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Allocation of Personnel to Local Administrative Units

Recommendations Regarding State Board of Education Formulas

**A Report from the Commission
Created by Resolution 91 of the 1977
North Carolina General Assembly**

April, 1978

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North Carolina General Assembly
 House of Representatives
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 MENTAL HEALTH
 NATURAL AND ECONOMIC
 RESOURCES
 STATE GOVERNMENT

TO: Governor James B. Hunt, Jr.
 Lt. Governor James C. Green, President of the Senate
 Representative Carl J. Stewart, Jr., Speaker of the House
 H. David Bruton, Chairman, State Board of Education
 A. Craig Phillips, State Superintendent of Public Instruction
 Members of the State Board of Education

Pursuant to Resolution 91 of the 1977 Session of the General Assembly, a Commission was established by the State Board of Education to study the formulas and funding procedures by which the Board allocates funds to local administrative units. After thoughtful study and deliberation and input from various groups, the Commission has developed recommendations which we feel will significantly contribute to the quality of public elementary-secondary education for the youth of our State.

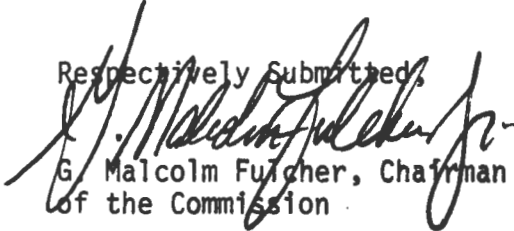
As the Commission went about its work, several key ideas guided the development of its recommendations. First, the formulas for allocating personnel should enable the State Board of Education and local boards of education to be responsive to the changing needs of children. Second, flexibility in making decisions concerning assignment of personnel in the most effective manner to meet local conditions should rest with the leadership of local school administrative units to staff a balanced educational program for all children.

While the Commission's Report lays out strategies as the Commission sees them, the needs of the public schools are so serious that the

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Commission recommends that the presiding officers of the two Houses take steps to continue the Commission for the purpose of providing guidance and direction in implementing the recommendations in this Report on a long-range basis.

Respectively Submitted,

G. Malcolm Fulcher, Chairman
of the Commission

cc: Senator Livingston Stallings, Chairman, Senate Education Committee
Representative Dwight Quinn, Chairman, House Education Committee
Senator Ed Renfrow, Chairman, Senate Appropriations Subcommittee
on Education
Representative Jay Huskins, Chairman, House Appropriations Subcommittee
on Education
Representative Lura S. Tally, Chairman, Legislative Research Commission's
Committee on Public School Employee Salaries
Representative Jo Graham Foster, Chairman, Legislative Research
Commission's Subcommittee on Public School Employee Salaries
Eddie Knox, Chairman, Advisory Budget Commission
John Williams, State Budget Officer
John Allen, Fiscal Research Division
Joe Porter, Controller, State Board of Education

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Acknowledgements

Providing local school systems with the resources and personnel necessary to ensure excellence in our public schools is perhaps the single most important function of State government. The quality and quantity of resources provided public education have a direct impact on the excellence of our schools and the future of the students who attend them. Undertaking a major study to determine the adequacy of current methods for funding public education represented a considerable challenge. Without a dedicated Commission, a considerable amount of hard work and sacrifice, and a great deal of assistance from a wide variety of individuals and organizations, the work of this Commission could not have been completed.

The recommendations in this report represent the ideas and input from a great many people across the State. Appreciation is expressed to the teachers, principals, superintendents, central office personnel, citizens, legislators, members of local boards of education, and county commissioners for their support and interest in this study. The position papers, written materials, and other communications were invaluable in helping the Commission develop its recommendations.

Special thanks is given to members of the Department of Public Instruction and the Controller's Office for providing information, statistics, and general staff assistance to the Commission.

I would like to express my personal gratitude to the members of the Commission for their willingness to serve, their hard work, and the excellence of their recommendations. I feel certain that implementation of the recommendations contained in this report will provide an additional measure of quality to the public schools of North Carolina.

G. Malcolm Fulcher, Jr.
Chairman of the Commission

Introduction

Over the past several years, a number of State goal studies have been conducted to determine the public's opinion on a variety of policy issues facing the State. The priority attached to various goals and the action or inaction to implement new policy directions will impact heavily on the future quality of life in North Carolina. Regardless of which survey one examines, it is clear that public education is an area of great concern to the citizenry of North Carolina. It is also notable that all the other top areas of public concern--higher paying jobs, more employment opportunities, less crime, and reduced welfare--are closely related to education. Education, then, is not only a top priority itself, but it is also a viable strategy for addressing many of the important goals that the public feels are important.

It was against this background of citizen concern for improved educational opportunities that House Bill 1291 was introduced in the 1977 General Assembly. Emanating from this legislation was Resolution 91, which authorized the State Board of Education to appoint a Study Commission to investigate the adequacy and equity of current school funding procedures and to recommend needed changes.

Historical Background of State School Support in North Carolina

North Carolina's system of public education is a legal obligation of the State, although the responsibility for financing the schools is shared with local governments. In 1933, as a result of the Depression, the General Assembly passed the School Machinery Act which embodied the principle of complete State support for the operational costs of the public schools. Except for capital improvements and plant maintenance, which are primarily paid for at the local level, the State pays the basic costs of maintaining a state-wide school system. The basic structure of school finance in North Carolina has not changed since 1933. As new programs were adopted, new line items were added in the State budget. Local school systems, however, have the option of providing local funds to supplement the financial resources provided by the State.

Individual citizens and organizations with specific interests in various school programs and operations have worked diligently for the passage of legislation addressing their concerns. Undoubtedly, the work of these concerned individuals and groups has resulted in legislation which improved public education. At the same time, however, it has created a situation whereby various interest groups must compete with one another for the limited financial resources available. In addition, legislation passed to accommodate specific interest groups and new programs has resulted in a

hodge-podge, complex State funding system and a reduction in the flexibility local school systems have in the use of State educational monies.

While the current State funding program is not extremely inequitable, the system does not ensure that all children will have access to the programs and services needed to achieve state-wide excellence in public education. The wealthier school systems are able to provide local funds for programs and services which the State does not adequately fund. Less affluent school districts, however, are unable to generate the local resources necessary to provide the same level of quality. If North Carolina is to promote state-wide educational excellence and equal opportunities for all children, progress must be made in establishing a comprehensive state system of funding the public schools at a level sufficient to support adequate programs and services in every school in North Carolina.

Background of Legislation Creating the Commission

The Study Commission established by the 1977 General Assembly under Resolution 91 was the result of legislation introduced by Representative Malcolm Fulcher in House Bill 1291 and supported by 93 legislators who signed the bill. This legislation called for improvements in the public schools through reductions in class size and the separate allotments of classroom teachers, principals, assistant principals, and other supervisory personnel. While House Bill 1291 received considerable support in the General Assembly, a shortage of funds and the feeling that additional study on the topic was necessary resulted in the passage of Resolution 91, which created the Study Commission. As contained in Resolution 91, the purpose of the Study Commission was to study the various formulas for allocating funds to local administrative units and address the issues of equity in funding, pupil-teacher ratios, and program cost. The recommendations resulting from the Commission's work are to be reported to the State Board of Education in time for them to be reflected in the Board's requests to the Advisory Budget Commission in early 1978 and to the May, 1978 Session of the General Assembly.

Organization and Study Procedures Used by the Commission

The Study Commission began its deliberations in October, 1977, with a general orientation to the various position allocation formulas and the current system of allocating positions and/or resources to local school administrative units in North Carolina. A study of local school

administrative units indicated four major areas that should be targeted for study. These were: (1) instructional personnel and class size; (2) instructional support personnel; (3) school level administration and support; and (4) central office administration and support. A subcommittee was appointed to study each of these areas.

Subcommittees met periodically to study current procedures, identify problems and needs, and develop recommendations for consideration by the full Commission. The Department of Education provided information and staff services to the Commission. Interested organizations submitted written recommendations concerning problems, needs, and changes they felt should be addressed in the study.

Upon completion of its work, each subcommittee presented its recommendations to the full Commission for review in terms of merit and costs. After considerable deliberation, the Commission developed the following recommendations regarding needed changes in the allocation procedures to local school administrative units.

Recommendation #1 Class Size

THE MAXIMUM CLASS SIZE, K-12, SHOULD BE REDUCED TO ONE TEACHER FOR TWENTY-SIX STUDENTS. THE ONLY EXCEPTIONS TO THIS LONG-RANGE GOAL ARE BAND AND CHORUS, WHICH REQUIRE MORE THAN TWENTY-SIX STUDENTS TO ADEQUATELY PROVIDE AN INSTRUCTIONAL/LEARNING EXPERIENCE

1. The first priority for using additional teaching personnel should reduce the daily class load to 150 students per day in junior high schools and other departmentally organized schools.
2. After the daily class load in junior high schools and other departmentalized schools has been reduced to 150 students per day, the second priority for using additional teaching personnel should reduce the maximum class size to one teacher for twenty-six students in grades four through eight.
3. The additional teaching positions should be used to reduce maximum class size to one teacher for twenty-six students in grades nine through twelve. This will complete the maximum class size of one teacher for twenty-six students, K-12.
4. After a class size of one to twenty-six is achieved, K-12, the Commission then recommends that the maximum total daily contact hours per teacher be 135 students in departmentalized schools. The only exception to this are band and chorus, which require larger numbers of students to effectively have a program.
5. Where exceptional children are assigned to regular instructional programs, the maximum class size for that class should be reduced by one student for every two exceptional children enrolled. It would be desirable that no more than six exceptional children be enrolled in a class.

JUSTIFICATION:

Achieving a goal of a maximum class size of one teacher for twenty-six students, K-12, would provide a teacher-pupil ratio to assure effective and individualized learning programs for each pupil. The reduction in the number of different pupils that must be taught by each teacher would result in a better understanding of each pupil, improved diagnosis of learning problems, the development of a more individualized learning program for pupils tailored to their specific learning abilities, and more personal and individual attention to a pupil's educational needs. The achievement of these goals and practices will enable the public schools to more effectively deal with discipline problems and improve student achievement in the basic skills.

Recommendation #2 Instructional Personnel

Allotment

CLASSROOM TEACHERS SHOULD BE ALLOTTED ON THE BASIS OF ONE TEACHING POSITION FOR EACH TWENTY-THREE STUDENTS, K-12. SUCH POSITIONS SHOULD BE USED ONLY FOR TEACHING POSITIONS, STATIONED IN CLASSROOMS AT THE SCHOOL LEVEL. SEPARATE ALLOTMENTS SHOULD BE MADE FOR ADMINISTRATIVE, INSTRUCTIONAL SUPPORT SERVICES, AND SYSTEM-WIDE SUPERVISION. UNTIL SUFFICIENT FUNDS CAN BE APPROPRIATED TO FUND TEACHING POSITIONS ON THE BASIS OF ONE TEACHER FOR TWENTY-THREE STUDENTS, K-12, ALL APPROPRIATIONS FOR ADDITIONAL TEACHING PERSONNEL SHOULD BE IN KEEPING WITH THIS LONG-RANGE GOAL

1. Until an allotment of one teacher for twenty-three students, K-12, can be achieved, the Commission recommends that appropriations for additional teaching personnel be directed toward reducing the daily class load at the junior high school and other departmentally organized schools to 150 students per day.
2. After the daily class load in junior high schools and other departmentally organized schools has been reduced to 150 students per day, additional teaching personnel should be provided in grades kindergarten through twelve to achieve an allotment of one teacher for twenty-three students.
3. As the allotment goal of one teacher for twenty-three students is implemented, these new resources should be used to achieve the class size provisions in Recommendation #1.
4. Instructional personnel for exceptional children should be allotted on the basis of one position for each fifteen exceptional children, K-12, to adequately meet the educational needs of handicapped and gifted students.

JUSTIFICATION:

Separating regular classroom teacher allotments from other personnel allotments would assure compliance with established class size and make the system for allotting teachers more understandable to professionals, members of the General Assembly, and the public. The separate allotment for teachers would assure that teaching positions would be used for personnel who are assigned teaching duties. Adjusting the position allotment could be done more easily when fluctuations occur in the average daily membership (ADM) in local administrative units. In addition, striving for a goal of allotting one teacher for twenty-three students would provide the adequate personnel needed to assure learning for all students.

Reducing the daily class load in junior high schools and other departmentally organized schools to 150 students per day would alleviate many of the problems associated with attempts to maintain class size requirements in departmentalized schools. It would bring teaching loads in departmentalized schools down to the same level currently established for senior high schools.

Allotting personnel for exceptional children on the basis of one position for fifteen exceptional children would provide the instructional services for all exceptional children, age five through seventeen, mandated in Federal legislation (P. L. 94-142) and State legislation (H. B. 824) by September 1, 1978. The positions allotted under this formula would be used for teachers, speech/language specialists, physical therapist, occupational therapists, teacher aides, and other personnel. The one for fifteen allotment would be achieved by adding to the positions currently funded by the State for exceptional children.

Recommendation #3 Personnel Allotment on Basis of Average Daily Membership (ADM)

ALL PERSONNEL ALLOTMENTS TO LOCAL ADMINISTRATIVE UNITS SHOULD BE MADE ON THE BASIS OF AVERAGE DAILY MEMBERSHIP

1. All personnel allotments should be made to local administrative units on the basis of average daily membership (ADM) for the best continuous three of the first four months using system-wide data of the previous year. All students, K-12, should be counted in the ADM data. The one exception to this recommendation is the allotment of principals, assistant principals, and professional office personnel at the school level.

JUSTIFICATION:

Currently, some of the formulas for allotting positions and funds to local administrative units use the best continuous six of the first seven months of the previous year, while other formulas use the best continuous three of the first four months in calculating average daily membership (ADM). Moving to a uniform best continuous three of the first four months on a system-wide basis for allotting positions would eliminate the inconsistencies which now exist. In addition, it would provide local administrative units with more lead time for planning programs. Using system-wide data would retain and strengthen local responsibility in providing leadership for the most effective use of the resources within the local administrative unit.

Recommendation #4 Administrative Leadership at School Level

SEPARATE POSITION ALLOTMENTS FOR PRINCIPALS AND ASSISTANT PRINCIPALS SHOULD BE MADE TO PROVIDE INSTRUCTIONAL LEADERSHIP AT THE SCHOOL LEVEL

1. A full-time, non-teaching principal should be allotted for each organized school with seven or more teachers. This position should be allotted over and beyond the allotment of classroom teachers. For small schools with fewer than seven teachers, one of the teaching positions should be designated as a leadership position and supplemented in salary.
2. Non-teaching assistant principals should be allotted for schools over and beyond the allotment of classroom teachers. These positions should be allotted on the basis of the following formula:

<u>School ADM</u>	<u>Positions</u>
400- 899	1
900-1,499	2
1,500-2,199	3
2,200 & above	4

3. The salaries of principals should be based on experience ratings and total average daily membership (ADM) for the schools in which they serve. The ADM should be based on the best continuous three of the first four months.
4. A salary schedule for assistant principals, based upon experience and certification should be established.¹

JUSTIFICATION:

Separate allotments for principals and assistant principals, which now come from the teacher allotment, would clarify the intent and purpose of the allotment and would provide the instructional leadership and administration needed in each school. Class specifications defining the role of assistant principals should be established and might include responsibilities for instructional programs, instructional support such as media, pupil personnel services, and staff development or non-instructional functions such as transportation, school food services, building management, community education, and student activities.

¹ A salary schedule is being considered by the Legislative Research Commission's Subcommittee on Public School Employee Salaries.

A key responsibility of school administration at the school level is the management of facilities, housekeeping, auxiliary services, and other non-instructional functions essential to the operation of an effective school program. The Commission believes strongly that any school with more than one assistant principal should define as part of the work load of one assistant principal as being that of building manager.

When a school has fewer than seven State-allotted teachers, it should be eligible for a non-teaching principal if it can justify its existence in terms of the school being essential for the health and safety of the students, geographical location, and similar factors.

Recommendation #5 Instructional Support Personnel

SEPARATE POSITION ALLOTMENTS FOR PUPIL PERSONNEL SERVICES AND LIBRARY/MEDIA SERVICES SHOULD BE MADE TO PROVIDE ADEQUATE INSTRUCTIONAL SUPPORT SERVICES

A. Pupil Personnel Services

1. All pupil personnel services allotments for school-level services should be based on system-wide average daily membership (ADM), K-12, using the best continuous three of the first four months.
2. School counselors - one per 400 average daily membership (ADM), K-12
3. School psychologists - one per 3,000 average daily membership (ADM) (A minimum of one position will be allotted to each county administrative unit. City administrative units with less than 3,000 ADM will share the services of the psychologist position allotted to the county units in which the city unit is located.)
4. School social workers - one per 2,000 average daily membership (ADM)
5. School nurses - one per 2,500 average daily membership (ADM)

B. Library/Media Services

1. All library/media services allotments for school-level services should be based on system-wide average daily membership (ADM), K-12, using the best continuous three of the first four months.
2. The allotment formula should provide one position for each 500 average daily membership (ADM), K-12.

JUSTIFICATION:

A comprehensive and well organized pupil personnel program consists of a team of pupil personnel specialists, counselors, social workers, and school psychologists, who provide services which supplement and support the work of classroom teachers and school administrators. While these services are available to all students, emphasis is given to pupils with special problems and needs

Current staffing patterns in the area of pupil personnel services are extremely inadequate in relation to the number and magnitude of problems facing the public schools. School dropouts, drug abuse, truancy, underachievement, and poor discipline are examples of the problems the pupil personnel team attempts to alleviate. The current allotment system, however, provided less than 50 percent of the personnel recommended to adequately staff a pupil personnel program. Most of the positions now used for pupil personnel services come from the teacher allotment category.

Library and media services are an integral and essential part of a comprehensive instructional program. Not only do these services provide support to other curricular areas, they also are responsible for ensuring that students acquire the basic library reference skills which are critically important to functional literacy and future educational pursuits. Library personnel, at a current ratio of one to 681 students, fill positions that come from the teacher allotment at the expense of increased class size in the schools.

Recommendation #6 Administrative Unit Central Office Staffing

SEPARATE POSITION ALLOTMENTS FOR CENTRAL OFFICE PERSONNEL SHOULD BE MADE TO PROVIDE ADEQUATE EDUCATIONAL LEADERSHIP IN LOCAL SCHOOL ADMINISTRATIVE UNITS

1. Separate position allotments should be established for all central office personnel. System-wide leadership, administrative, and consulting personnel allotments should be based on system-wide average daily membership (ADM), K-12, using the best continuous three of the first four months. Allotments for classroom teachers, principals, assistant principals, pupil personnel services (except school psychologists, school social workers, and school nurses) and library/media services should not be permitted to be used for system-wide services.
2. One chief administrative officer (superintendent) should be allotted to each local school administrative unit.
3. Allotments for central office positions should be made on the following formulas:

(a) Assistant Superintendents

<u>ADM</u>	<u>Positions</u>	<u>ADM</u>	<u>Positions</u>
0-1,999	0	6,000- 6,999	2.2
2,000-2,999	.5	7,000- 7,999	2.4
3,000-3,999	1.0	8,000- 8,999	2.6
4,000-4,999	1.5	9,000- 9,999	2.8
5,000-5,999	2.0	10,000-19,999	3.0

One for each additional 10,000 ADM

(b) Instructional Consultants (Consultants at grade level and/or instructional areas)

<u>ADM</u>	<u>Positions</u>
0- 1,999	1
2,000- 4,999	2
5,000- 9,999	3
10,000-14,999	4

One for each additional 5,000 ADM

(c) Auxiliary Services Consultants and Directors

<u>ADM</u>	<u>Positions</u>
0- 1,999	2
2,000- 4,999	3
5,000- 9,999	4
10,000-14,999	5

One for each additional 5,000 ADM

JUSTIFICATION:

Separate position allotments for central office personnel would correct the current practice of using teaching positions to provide system-wide educational leadership and administration. Adequate central office personnel are needed to provide leadership and administration of those functions which are essential to the operation of a local school administrative unit. These functions are: overall leadership and direction of the education system, instruction, administration, personnel, and pupil personnel services.

Instructional consultants would serve as grade level and/or instructional consultants in such areas as the basic programs, educational media, exceptional children, and vocational education. Their responsibilities would include working with teachers in curriculum design and development, improvement of existing programs, identifying and designing new instructional programs, coordination of programs, and cooperative development of new teaching strategies for implementation in the classrooms. Some of the current positions used for these services now come from the general teacher allotment or from positions/funds targeted to specific instructional programs.

Auxiliary services consultants and directors would provide leadership and administer specific programs/services on a system-wide basis. These programs/services would include school food services, transportation, maintenance, and fiscal affairs.

Recommendation #7 Professional Office Personnel

SEPARATE POSITION ALLOTMENTS FOR PROFESSIONAL OFFICE PERSONNEL SHOULD BE MADE TO PROVIDE SUPPORT SERVICES IN THE CENTRAL OFFICE AND THE SCHOOLS

A. Administrative Unit (Central Office)

1. Professional office personnel allotments should be based on system-wide average daily membership (ADM), K-12, best continuous three of the first four months.
2. Allotments for the following service areas should be made on the basis of the formulas listed below:

(a) Secretarial Services

<u>ADM</u>	<u>Positions</u>
0- 1,999	3
2,000- 4,999	5
5,000- 9,999	6
10,000-14,999	7

One for each additional 5,000 ADM

(b) Accounting Services

<u>ADM</u>	<u>Positions</u>
0- 1,999	1
2,000- 4,999	1
5,000- 9,999	2
10,000-14,999	3

One for each additional 5,000 ADM

(c) Technical Services

<u>ADM</u>	<u>Positions</u>
0- 1,999	1
2,000- 4,999	1
5,000- 9,999	2
10,000-14,999	2

One for each additional 5,000 ADM

3. A classification system and salary schedule should be established for professional office personnel.¹

B. School-Level Services

1. Professional office personnel allotments for school-level services should be based on school average daily membership (ADM), K-12, best continuous three of the first four months.
2. Allotments should be made on the following formula:

<u>School ADM</u>	<u>Positions</u>
0- 399	1
400- 899	2
900-1,499	3
1,500-2,199	4
2,200 & above	5

3. A classification system and salary schedule should be established for professional office personnel.¹

JUSTIFICATION:

The current procedures for allocating resources for professional office personnel is based on an average daily membership (ADM) money allocation to the local administrative units. The absence of a salary schedule and position allotment formula results in a wide range of responsibilities and salaries currently being paid to professional office personnel. The establishment of a salary schedule and allotment formula would bring about more uniformity in salary and provide professional office personnel to carry out the secretarial/clerical services in the central office and at the school level.

Secretarial services would provide support to superintendents, assistant superintendents, and consultants in the central office. These persons would perform the regular secretarial/clerical duties established for these positions.

Accounting services would provide the support needed to carry out the fiscal and accounting procedures which must be conducted in each local administrative unit. The recently enacted Fiscal Control Act requires a uniform and more comprehensive and detailed budgeting and accounting system in all local administrative units.

¹ A salary schedule is being considered by the Legislative Research Commission's Subcommittee on Public School Employee Salaries.

Technical services would provide the system-wide support needed in a number of essential areas of school operations. These areas include audio-visual equipment repair and maintenance, media production, and small instructional equipment maintenance and repair.

Secretarial services in the school would provide general secretarial support at the school level. Responsibilities would include general secretarial services, maintaining student records, filling out attendance reports, preparing payroll data, summarizing data and compiling reports, and performing receptionist duties.

Recommendation #8 Statewide Bond Referendum for School Construction

A STATEWIDE BOND REFERENDUM TO PROVIDE ADEQUATE PUBLIC SCHOOL FACILITIES SHOULD BE PRESENTED TO THE VOTERS OF THE STATE

1. Consideration should be given to presenting a Statewide bond referendum to the voters as early as 1979 for the purpose of improving and upgrading current school facilities, replacing old and outdated school buildings, and providing additional facilities to house new educational programs and practices.

JUSTIFICATION:

North Carolina has made substantial progress in constructing new school facilities; however, there are still unmet needs for school construction across the State. Many of our current facilities require extensive renovation to make them more appropriate for newly implemented instructional programs and teaching techniques. These new programs include expanded use of specialists, volunteers, aides, tutors, new programs emphasizing the basic learning skills, and community education programs.

The current emphasis on energy conservation will demand increasing attention, and it will require building renovations to make current facilities more energy efficient.

Federal and State laws require that all programs and activities be accessible to the handicapped. Considerable expenditures will be required to make school facilities constructed prior to 1973 accessible to handicapped persons.

Although local school administrative units and county commissioners have expanded their efforts in school construction, these units of government have not been able to keep up with the needs for new school facilities. New facilities and teaching stations are needed to house kindergarten students and new programs in appropriate learning stations. New facilities are needed to replace mobile units, outdated schools, and buildings which have deteriorated due to a lack of adequate maintenance funds.

Conclusion


The work of the Commission was primarily directed toward developing recommendations that will provide adequate personnel to carry out the work of the public elementary-secondary schools across the State. With approximately 85-90 percent of the State education dollar currently being used for personnel, the Commission strongly recommends increased support for a comprehensive staff development program. This program should enable all personnel who are working in the schools to continually upgrade and improve their knowledge, competencies, and skills in the field of education.

The recommendations contained in this document were developed to serve as a blueprint for the long-range improvement in the quality of public education offered to the citizens and youth of North Carolina. While the Commission realizes that not all of the recommendations can be implemented at one time, the only priorities for action in this Report are Recommendation #1, Class Size, and Recommendation #2, Instructional Personnel Allotment. The remaining recommendations are also considered essential to the improved quality of public education; however, these recommendations have not been placed in order of the highest priority.

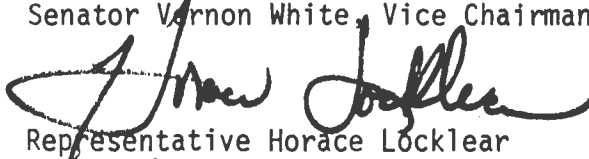
The recommendations developed by the Commission would increase the investment of State resources in public education. The Commission commends the aggressive leadership of local governmental units for their increased investment in public education, and encourages their continuing effort and support for the improved quality of the public schools in their communities. As this Report is presented, another commission, Governor's Commission on Public School Finance, is doing an extensive study on financing public education in North Carolina. The results of that study will have an impact upon state-local funding relationships and will develop a new partnership in providing the needed resources for public education. Together, the work of the two Commissions will provide the quality of public education needed and desired by the citizens of the State.

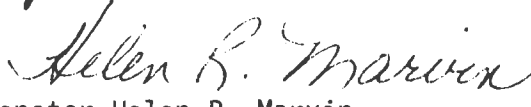
In the long discussions that took place to develop the recommendations in this Report, all of us presented our own ideas as to how the allocation of personnel to local school administrative units can be done in the most effective manner. Not every idea of each Commission member was incorporated into the Report; however, a consensus was reached regarding the final recommendations and are presented and supported without a dissenting vote of the Commission.

Signatures of Commission Members:


Representative Malcolm Fulcher, Chairman


Senator Vernon White, Vice Chairman



Representative Horace Locklear


Senator Helen R. Marvin


Senator Carolyn Mathis


Representative Betty D. Thomas


Mr. John A. Pritchett


Mr. John I. Wilson


Mrs. Jeanette Council

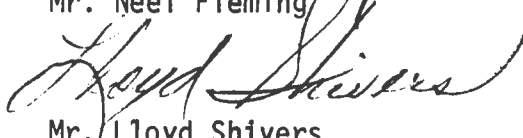

Mr. R. Thorpe Jones


Mr. Donald Jones


Mrs. Patricia H. Neal


Mr. Ralph Hunt


Mr. Neel Fleming


Mr. Lloyd Shivers



Appendix

GENERAL ASSEMBLY OF NORTH CAROLINA

SESSION 1977

RATIFIED BILL

RESOLUTION 91

HOUSE JOINT RESOLUTION 1291

A JOINT RESOLUTION TO PROVIDE FOR A STUDY OF THE FORMULAS AND FUNDING PROCEDURES WHEREBY THE STATE BOARD OF EDUCATION ALLOCATES FUNDS TO LOCAL ADMINISTRATIVE UNITS.

Be it resolved by the House of Representatives, the Senate concurring:

Section 1. The State Board of Education is hereby directed to appoint a commission to study the various formulas for allocating funds to local administrative units. The commission's membership shall reflect representation from the legislature, boards of education and local administrators.

Sec. 2. The commission shall address the issues of equity in funding, pupil-teacher ratios, and program costs as encompassed in House Bill 1291 as originally introduced in the 1977 General Assembly.

Sec. 3. As used in this resolution, the term "teacher-pupil ratio" includes the ratio of pupils to occupational education teachers, special education teachers, to classified principals and assistant principals and other supervisory personnel, and to instructional support personnel, as well as the ratio of pupils to general classroom teachers.

Sec. 4. The commission shall report to the State Board of Education in sufficient time for the board to reflect the recommendations in its interim budget request to the Advisory

Budget Commission in early 1978. The commission shall keep the Legislative Research Commission advised of its progress on the study, since the Research Commission will be undertaking a related study of school funding and personnel. The commission shall also report to the 1977 General Assembly, Second Session 1978.

Sec. 5. The State Board of Education is authorized to pay customary compensation and expenses to commission members and to pay the other reasonable expenses of the commission from funds appropriated to the board.

Sec. 6. This resolution shall become effective upon ratification.

In the General Assembly read three times and ratified, this the 1st day of July, 1977.

JAMES C. GREEN, SR.

James C. Green
President of the Senate

CARL J. STEWART, JR.

Carl J. Stewart, Jr.
Speaker of the House of Representatives

Resolution 91

Commission Membership

1. Representative Malcolm Fulcher, Chairman
Counselor, West Carteret High School
Morehead City, NC 28557
2. Senator Vernon White, Vice Chairman
P.O. Box 41
Winterville, NC 28590
3. Representative Betty D. Thomas
160 Glendale Avenue, SE
Concord, NC 28025
4. Senator Helen R. Marvin
Instructor, Gaston College
Dallas, NC 28034
5. Representative Horace Locklear
P.O. Box 877
Lumberton, NC 28358
6. Senator Carolyn Mathis
Exceptional Children Specialist
Charlotte/Mecklenburg Schools
Charlotte, NC
7. Mr. John A. Pritchett, Member
State Board of Education
Windsor, NC 27983
8. Mr. John I. Wilson, Teacher
Wake County Schools
1212 Schaub Drive
Raleigh, NC 27606
9. Mrs. Jeanette Council, Teacher
Lucile Souders School
Raleigh Road
Fayetteville, NC 28301
10. Mr. R. Thorpe Jones
Assistant Superintendent
Greensboro City Schools
P.O. Drawer V
Greensboro, NC 27402
11. Mr. Donald Jones, Superintendent
Asheville City Schools
Box 7347
Asheville, NC 28807
12. Mrs. Patricia H. Neal, Chairman
Durham County Board of Education
6313 Garrett Drive
Durham, NC 27707
13. Mr. Ralph Hunt, Chairman
Robeson County Board of Education
Box 1328
Lumberton, NC 28358
- 14.. Mr. Neel Fleming
Alamance County Board of Commissioners
Box 301, Route 1
Haw River, NC 27258
15. Mr. Lloyd Shivers, Principal
Mountain View School
Bouchelle Street
Morganton, NC 28655

COMMISSION SUBCOMMITTEES

Class Size and Teacher Allotment

Vernon White, Chairperson
Helen Marvin
Patricia Neal
John I. Wilson

Educational Leadership and Professional Office Personnel in Schools

Horace Locklear, Chairperson
Donald Jones
Lloyd Shivers

Pupil Personnel and Library/Media Services

Malcolm Fulcher, Chairperson
Jeanette Council
Ralph Hunt

Central Office Staffing

Betty Thomas, Chairperson
Neel Fleming
R. Thorpe Jones
Carolyn Mathis
John Pritchett

PHASE-IN IMPLEMENTATION SCHEDULE

Recommendations	1978-79 Session	1979-81 Biennium	1981-83 Biennium	1983-85 Biennium	Total
1. & 2. Class Size and Instructional Personnel Allotment ₁					
(a) Reduce Junior High and other departmentally organized schools daily class load to 1:150 ADM 3,097 positions	\$ 6,626,300	\$ 12,661,995	\$ 12,661,995	\$ 12,661,995	\$ 44,612,285
(b) Reduce allotment in Grades 4-8 to 1:23 ADM 3,080 positions		44,367,400			44,367,400
(c) Reduce allotment in Grades 9-12 to 1:23 ADM 2,884 positions			41,544,020		41,544,020
(d) Reduce allotment in Grades K-3 to 1:23 ADM 873 positions				12,575,565	12,575,565
(e) Reduce exceptional children allotment to one teacher for 15 exceptional children 5,952 positions	15,000,000	23,579,520	23,579,520	23,579,520	85,738,560
(f) Reduce regular class size by one pupil for each 2 exceptional pupils, 3,115 pos.				44,871,575	44,871,575
3. Personnel Allotment on Basis of Average Daily Membership implementing best continuous 3 of first 4 months to calculate Average Daily Membership 548 positions	7,893,940				7,893,940
4. Administrative Leadership at School Level					
(a) Allot a full-time principal for each school 7 teachers or more 1,978 positions ₂	46,253,552				46,253,552
(b) Allot assistant principals 1,738 positions ₃	515,460	8,555,257	8,555,257	8,555,258	26,181,232
5. Instructional Support Personnel					
(a) School Counselors 2,959 positions		13,283,937	13,283,937	13,283,938	39,851,812
(b) School Psychologists 450 positions ₄	827,781	2,158,723	2,158,723	2,158,723	7,303,950
(c) School Social Workers 592 positions ₅		2,726,357	2,726,357	2,726,358	8,179,072

PHASE-IN IMPLEMENTATION SCHEDULE
(Continued)

Recommendations	1978-79 Session	1979-81 Biennium	1981-83 Biennium	1983-85 Biennium	Total
(d) School Nurses 473 positions ₆		\$ 2,020,971	\$ 2,020,971	\$ 2,020,972	\$ 6,062,914
(e) Library/Media Specialists 2,366 positions		11,987,733	11,987,733	11,987,734	35,963,200
6. Central Office Staffing					
(a) Assistant Superintendents 278 positions ₇	\$ 2,788,929	3,837,757			6,626,686
(b) Instructional Consultants 436 positions ₈	6,690,840		2,659,180		9,350,020
(c) Auxiliary Services Consultants and Directors 581 positions ₉		3,461,211	3,461,211	3,461,210	10,383,632
7. Professional Office Personnel					
(a) Central Office ₁₀					
(1) Secretarial Services 853 positions	2,431,884	2,410,585	2,410,584	2,410,584	9,663,637
(2) Accounting Services 309 positions		1,166,887	1,166,887	1,166,887	3,500,661
(3) Technical Services 279 positions		1,053,597	1,053,597	1,053,597	3,160,791
(b) School-level Services ₁₁					
(1) Secretarial Services 2,017 positions ₁₂	9,833,578	3,511,363	3,511,363	3,511,362	20,367,666
(2) Secretarial Services 1,738 positions ₁₃		4,873,352	4,873,352	4,873,352	14,620,056
Total ₁₄	\$98,862,264	\$141,656,645	\$137,654,687	\$150,898,630	\$529,072,226

EXPLANATIONS OF ESTIMATED BUDGET REQUIREMENTS

1. Currently there are 48,713 regular positions allotted. To implement all phases of this recommendation, K-12 would require an additional 9,934 regularly allotted positions. (average salary including fringe \$14,405) 10 months.
2. During 1976-77, 1,985 principals were paid from the regular teacher allotment according to MIS. (average salary including fringe \$23,384) 12 months.
3. During 1976-77, 844 assistant principals were paid the supplement. 203 assistant principals were not paid the supplement. A total of \$515,460 was paid by the state. (average salary including fringe \$15,064)
4. During 1976-77, 51 psychologists were allotted. (average salary including fringe \$16,231) 12 months.
5. New positions. (average salary including fringe \$13,816) 10 months.
6. New positions (average salary including fringe \$12,818) 10 months.
7. During 1977-78, 117 assistant and associate superintendents were allotted. (average salary including fringe \$23,837) 12 months.
8. During 1977-78, 312 instructional consultants were allotted. (supervisors: average salary including fringe \$21,445) 12 months.
9. Average salary including fringe \$17,872 (12 months.)
10. Currently there are no positions allotted for this purpose; however, \$2,431,884 is allotted. New positions have a mean salary including fringe of \$11,329 for 12 months.
11. Currently there are no positions allotted for this purpose; however, \$9,833,578 is allotted.
12. This is the higher of two levels of secretarial services. The mean salary, including fringe is \$10,098 for 12 months.
13. This is the lower of two levels of secretarial services. The mean salary, including fringe is \$8,412 for 10 months.
14. The following estimated amounts are being allotted for the 1977-78 school year from state funds:

Principal		\$46,253,552
Assistant Principal		515,460
School Psychologist		827,781
Assistant Superintendent		2,788,929
Instructional Consultants		6,690,840
Auxiliary Services Consultants*		7,238,848
Secretarial Services Central Office		2,431,884
Secretarial Services School-level		9,833,578
		<u>\$76,580,872</u>
*Maintenance	29 positions	\$ 400,000
Transportation	118.5 positions	1,682,848
School Lunch	210 positions	5,156,000
		<u>\$ 7,238,848</u>

EXPLANATIONS OF ESTIMATED BUDGET REQUIREMENTS
(Continued)

Current teacher allotment is used to meet class size regulations with remaining positions used for principals, assistant principals, counselors and Library/Media specialists.

Vocational education allotments are made separately and not included in the above calculations.

All salaries are based on 1977-78 averages plus frings benefits or on proposed salary schedules prepared by the Legislative Research Commission Subcommittee on Public School Employees' Salaries.

Average daily membership is based on available statistics for 1977-78 on regular program from the Management Information Systems Division. Due to the nature of statistics available, departmentalized statistics might be off slightly.

