

Human Resources Administrators Newsletter - January 13, 2008

Colleagues,

Happy New Year and welcome back. Hope everyone had a great holiday. Due to economic constraints, this New Year brings great challenges for all of us. We'll continue to provide timely information to help remind and assist you as we face the challenges ahead.

Here's the latest:

1. TENURE AND CAREER STATUS REMINDER:

Just a reminder of key dates in the career teacher process. North Carolina General Statute 115C-325 identifies some important dates that must be followed. All career decisions must be made and the employee(s) notified in writing on or before June 15. Also, local boards of education must be notified of the names of those eligible for career status AT LEAST 30 DAYS prior to voting (115C-325(c)(2a).

2. ADMINISTRATIVE CONTRACTS:

It's also not too early to begin the conversation about administrative contracts. As you are aware, G.S. 115C-287.1 addresses administrative contracts. Administrators, whose contracts will end on June 30, must be notified of non-renewal of the contract by May 1. This notification must be in writing. Refer to G.S. 115C-287.1(d) for full details.

3. EVALUATIONS:

G.S. 115C-333 requires 4 observations and a (summative) evaluation for teachers without career status. One observation is by a peer and the remainder by the principal or the principal's designee. If problems are identified in the observations, corrective actions should be initiated promptly. If performance is below standard or unsatisfactory on an evaluation, the teacher must be placed on an action plan, in the event the superintendent does not recommend dismissal, demotion, or non-renewal.

4. REEMPLOYING RETIREES EXEMPT FROM THE EARNINGS CAP:

The provision that allows a "retired teacher" to be employed exempt from the earnings cap expires October 1, 2009. A "retired teacher" is a beneficiary of the Teachers' and State Employees' Retirement System of North Carolina who retired on or before October 1, 2007, and who has been retired at least six months, has not been employed in any capacity for at least six months, immediately preceding the effective date of reemployment, is determined by a local board of education or a charter school to have had satisfactory performance during the last year of employment by a local board of education or a charter school, and who is employed to teach as provided in G.S. 135 3(8)c. A retired teacher at a school other than a

charter school shall be treated the same as a probationary teacher except that (i) a retired teacher is not eligible for career status and (ii) the performance of a retired teacher who had attained career status prior to retirement shall be evaluated in accordance with a local board of education's policies and procedures applicable to career teachers.

"Retired teacher" also means a beneficiary of the Teachers' and State Employees' Retirement System of North Carolina who retired after October 1, 2007, after attaining (i) the age of at least 65 with five years of creditable service; or (ii) the age of at least 60 with 25 years of creditable service; or (iii) 30 years of service; who has been retired at least six months, has not been employed in any capacity for at least six months immediately preceding the effective date of reemployment, is determined by a local board of education or a charter school to have had satisfactory performance during the last year of employment by a local board of education or a charter school, and who is employed to teach as provided in G.S. 135 3(8)c. A retired teacher at a school other than a charter school shall be treated the same as a probationary teacher except that (i) a retired teacher is not eligible for career status and (ii) the performance of a retired teacher who had attained career status prior to retirement shall be evaluated in accordance with a local board of education's policies and procedures applicable to career teachers.

5. RETIREMENT SYSTEM PLANNING CONFERENCES:

The Retirement System is proud to partner with Prudential Retirement to provide information on the 401(k) and Deferred Compensation (457) plans at Retirement Planning conferences that are geared toward all members of the Local Governmental Employees Retirement System and the Teachers and State Employees Retirement System. The conferences last about 2 hours and provide an orientation for newer members, and pre-retirement planning information for members closer to retirement. Registration is not required. Some locations may charge a parking fee. Please see attachment for schedule.

6. THE NORTH CAROLINA CENTER FOR THE ADVANCEMENT OF TEACHING (NCCAT):

Provides a collegial and engaging environment for teachers - a place to learn, think, debate, and explore. Please join NCCAT's Connect to Your Future: Celebrating Success in the Classroom seminar, designed specifically for beginning teachers in their second or third year of teaching - at no expense to you or your school. NCCAT covers all program costs, including seminar expenses, meals, lodging, travel, and pay for the substitute teacher. Apply today by calling NCCAT Teacher Services at 800-922-0482. Please share this information with the beginning teachers in your school. For further details, please review attachments.

7. 2009 SCHOOL LAW ACADEMY:

Lex-IS Services has announced its 2009 Winter/Spring Regional Law Clinic and Symposium schedule. Topics address updates, issues and strategies in Special Education, Personnel Practices, Student Rights & Discipline, and School Cyberlaw. Programs, co-sponsored by various North Carolina law firms and professional organizations, include the following:

- January 29: Law Clinic-Charlotte
- February 24-25: Law Clinic-Smithfield
- March 4-5: Law Clinic-Asheville
- March 30-31: Law Clinic-Greensboro
- April 29-30: School Cyberlaw Symposium (Chapel Hill)

The latest school law program announcement is now available online at <http://archive.constantcontact.com/fs006/1101851386224/archive/1102402584233.html>.

Information and registration are available at: <http://lex-is.com/programs.php>. Early registration and other discounts are available.

8. NEW INSTITUTE: NORTH CAROLINA VIRTUAL PUBLIC SCHOOL INSTITUTE

NC VPS is meeting the needs of more students each year by providing access to courses not otherwise available to public school students. Every student in NC is eligible to take courses through NC VPS. 3-person teams from middle or high schools are encouraged to attend this institute to learn everything you ever wanted to know about online courses through NC VPS. During this 2-day institute for high school principals, middle school principals, curriculum leaders and superintendents the NCVPS leadership team focuses on virtual student learning and how to add online courses to your school schedule. The institute includes getting access to courses not available at your local school, online make up credits, completing courses faster and flexible time management by setting your own schedule. Learn how students can get courses and programs they want, available anywhere they can access the Internet.

Date: February 3-4, 2009

Cost: \$200.00 per person -- materials and most meals included

Capacity: 54 participants

www.ncpep.org/content.php/programs/ncvps/index.htm

9. HELP PRINCIPAL'S EXECUTIVE PROGRAM (PEP) STAY IN TOUCH WITH YOU

Your district may have changed email addresses for everyone or you may have taken a position in another school system. Please send your new contact information (job title, school name, telephone number, and email address) to Jeff Bell jbelle@northcarolina.edu.

10. UPDATE ITEMS FROM THE FINANCIAL AND BUSINESS SERVICES (FBS) NEWSLETTERS:

The Newsletters for Finance Officers and Personnel Administrators are posted online. For details click on www.ncpublicschools.org/fbs/resources/newsletters/

11. WHAT'S NEW ON THE WEB - DECEMBER 19, 2008 - NCDPI WEB HIGHLIGHTS:

For updates, access www.ncpublicschools.org/whatsnew/.

12. NEWSROOM:

The Communications and Information Division provides the online newsroom as a central resource of news and current information about K-12 education events, report releases and other initiatives in North Carolina public schools. Check weekly for current updates. www.ncpublicschools.org/newsroom/

ARTICLES OF INTEREST

THE PUBLIC SCHOOL FORUM OF NC - JANUARY 9, 2008:

The Forum is a not for profit policy think tank which is a partnership of business leaders, education leaders, and government leaders in North Carolina. Since opening its doors in 1986, the Forum has evolved into an organization that has made a significant contribution to schools across North Carolina. Articles reflect current issues about school systems. www.ncforum.org/

PUBLIC EDUCATION NETWORK WEEKLY NEWSBLAST

January 9, 2008: For details on articles, click:

www.publiceducation.org/newsblast_current.asp

GRANT AND FUNDING INFORMATION

UnitedHealthcare/YSA: HEROES Service-Learning Grants

UnitedHealthcare and Youth Service America are offering UnitedHealth HEROES service-learning grants for youth-led community education projects in selected states and areas. The program supports teachers, service-learning coordinators, and

students in the health professions who lead service-learning projects around childhood obesity, engaging children and youth ages 5 to 25 as volunteers. Maximum award: \$1,000. Eligibility: teachers, service-learning coordinators, students in the health professions, and non-profit organizations in selected cities and states. Deadline: January 15, 2009.

<http://servenet.org/Toolkit/ContentManagement/ServiceWireNews/tabid/122/articleType/ArticleView/articleId/805/Default.aspx>

National Center for Summer Learning: Excellence in Summer Learning Award
The Excellence in Summer Learning Award recognizes an outstanding summer program that demonstrates excellence in accelerating academic achievement and promoting positive development for young people between kindergarten and 12th grade. Award: national recognition, increased press opportunities, conference presentations and complimentary registrations, professional development opportunities for staff, and increased publishing opportunities. Eligibility: public or private organizations or agencies (schools, community-based organizations, libraries, universities, faith-based organizations, etc.) serving young people between the ages of kindergarten and 12th grade over the summer months. Deadline: January 21, 2009.

www.summerlearning.org/index.php?option=com_content&task=view&id=100&Itemid=422

Intel Foundation: Schools of Distinction

The Intel Foundation Schools of Distinction Program honors U.S. schools that have demonstrated excellence in math and science education. In order to be considered as an Intel School of Distinction, schools must develop an environment and curriculum that represents the intersection of benchmarks laid out by the Partnership for 21st Century Skills in their ICT literacy maps for math and science and national content standards for that content area. Maximum award: \$25,000 cash grant and \$100,000 in products and services from sponsors. Eligibility: K-12 public, private, charter, parochial schools in the United States, Department of Defense Dependents Schools, and Bureau of Indian Affairs schools. Deadline: February 17, 2009.

www.intel.com/education/schoolsofdistinction/

NABT/Vernier: Ecology/Environmental Teaching Award

The National Association of Biology Teachers Vernier Software & Technology Ecology/Environmental Teaching Award honors a teacher who has successfully developed and demonstrated an innovative approach in the teaching of ecology/environmental science and has carried his/her commitment to the environment into the community. Maximum award: \$1,000 toward travel to the NABT Professional Development Conference, and \$500 of Vernier equipment. Eligibility: secondary school teachers. Deadline: March 15, 2009.

www.nabt.org/sites/S1/index.php?p=290

Legacy Project: Listen to A Life

The Legacy Project Listen to A Life Contest connects generations through oral history. To enter, a young person must interview an older person about his or her hopes and goals throughout life, how he/she achieved goals and overcame obstacles, or how his/her dreams may have changed along the way. The young person then writes a 300-word essay based on the interview. Maximum award: a Lenovo ThinkCentre, iPod Classic, and \$800 worth of Orchard Software; young person's school receives \$25,000 worth of Orchard Software. Eligibility: each team must consist of a young person 8-18 years and a grandparent or grandfriend 50 years or over (co-entrant cannot be a parent; he or she can be a grandparent, older friend, mentor, neighbor, nursing home resident, etc.) Deadline: March 30, 2009.

www.legacyproject.org/contests/Ital.html

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Human Resources Administrators Newsletter - January 29, 2009

Colleagues,

Hope everyone is having a productive week.

Here's the latest:

1. TRAINING FOR NEW TEACHER EVALUATION INSTRUMENT: DPI will be training districts for the new teacher evaluation instrument. Please see attachment for training dates.

2. NORTH CAROLINA GENERAL ASSEMBLY: The 2009-2010 session of the North Carolina General Assembly convened on January 28, 2009. The website is now active. www.ncga.state.nc.us/

3. STATE BOARD OF EDUCATION WILL MEET FEBRUARY 3-5, 2009: The agenda is online at: www.ncpublicschools.org/sbe_meetings/.

4. LEX-IS SERVICES SCHOOL e-LAW UPDATE, Vol. 09-01: The new year has brought with it more new developments in school law. The latest update is now online: <http://lex-is.com/docs/update0901.htm>.

Highlights include the following:

- The U.S. Supreme Court expanded remedies for certain student sexual harassment claims.
- The Fourth Circuit ruled that a school system did not sufficiently evaluate special needs and, consequently, had to compensate parents.
- Prompted by the Virginia Tech shootings, new FERPA rules taking effect this month allow for more extensive sharing of information between schools for safety purposes.
- A school system can be "deliberately indifferent" and therefore liable for sexual harassment even though officials take some remedial actions after reported incidents.
- The National Council of School Attorneys has reported the top ten legal issues facing schools (and related legal information).
- Abandoned students left on school buses is a problem getting more attention by school officials and legislatures.

Hopefully, you will find these updates helpful. You're also invited to attend any of the upcoming school law. The next Law Clinic is January 29 in Charlotte.

5. UPDATE ITEMS FROM THE FINANCIAL AND BUSINESS SERVICES

(FBS) NEWSLETTER: The Newsletters for Finance Officers and Personnel Administrators are posted online. For details click on www.ncpublicschools.org/fbs/resources/newsletters/

6. WHAT'S NEW ON THE WEB – JANUARY 16, 2009 - NCDPI WEB

HIGHLIGHTS: For further updates, access online at www.ncpublicschools.org/whatsnew/.

- Graduation Requirements and More for Math Now Online
Graduation requirements for the Future Ready Core Course of Study for Mathematics are available on the Graduation Requirements Web site at www.ncpublicschools.org/gradrequirements/resources/.

7. NEWSROOM: The Communications and Information Division provides the online newsroom as a central resource of news and current information about K-12 education events, report releases and other initiatives in North Carolina public schools on the following: (Check weekly for current updates)

www.ncpublicschools.org/newsroom/

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- THE PUBLIC SCHOOL FORUM OF NC - JANUARY 16, 2009:

A not for profit policy think tank which is a partnership of business leaders, education leaders, and government leaders in North Carolina. Since opening its doors in 1986, the Forum has evolved into an organization that has made a significant contribution to schools across North Carolina. Articles reflect current issues about the school system. Further details: www.ncforum.org/.

- PUBLIC EDUCATION NETWORK WEEKLY NEWSBLAST - January 23, 2009:

Further details on other articles, click:

www.publiceducation.org/newsblast_current.asp .

Significant scientific learning takes place outside the classroom - A new report from the National Research Council stresses that scientific learning undertaken in informal settings like museums or through educational television can significantly contribute to scientific understanding, according to Science Daily. "Learning is broader than schooling, and informal science environments and experiences play a crucial role," said Philip Bell, co-chair of the committee that wrote the report, and associate professor of learning sciences at the University of Washington, Seattle. "These experiences can kick-start and sustain long-term interests that involve sophisticated learning." The study notes that these types of informal

experiences can have a particular impact on groups that are typically underrepresented in science, such as women and certain minorities. For those who design scientific experiences in non-academic settings such as museums, the report offers a number of guidelines for engaging visitors, and also offers recommendations for professional and volunteer staffs of institutions and programs that interact with the public about science. Further updates: www.publiceducation.org/newsblast_current.asp#10

- GRANT AND FUNDING INFORMATION

American Association of School Librarians: Collaborative School Media Library Award

The AASL Collaborative School Library Media Award recognizes and encourages collaboration between school library media specialists and teachers in meeting goals through joint planning of a program, unit, or event in support of the curriculum and using media center resources. Maximum award: \$2,500 to the recipient's school library media center. Eligibility: school library media specialists and teachers who have worked together to execute a project, event, or program to further information literacy, independent learning, and social responsibility using resources of the school library media center. The library media specialist must be a personal member of the AASL. Deadline: February 2, 2009.

www.ala.org/ala/aasl/aaslawards/collaborativeslm/aaslcollaborative.htm

Humane Society of the United States Youth: KIND Teacher Award

The Humane Society Youth National KIND Teacher Award recognizes an outstanding teacher who consistently incorporates humane and environmental education into his or her curriculum. Maximum award: recognition. Eligibility: teachers K-6. Deadline: February 15, 2009.

www.humanesocietyyouth.org/awards/national_kind_teacher_award.asp

BP: A+ for Energy Grants

BP's A+ for Energy program gives grants for implementing creative and innovative educational programs to teach students about energy use, alternative and sustainable energy types and sources, and energy conservation. Maximum award: \$10,000. Eligibility: teachers K-12 in Alabama, California, Illinois, Indiana, New Mexico, Ohio, South Carolina, and Texas. Deadline: March 9, 2009.

www.aplusforenergy.org

U.S. Dept. of Education: Teaching Ambassador Fellowship

The U.S. Department of Education is accepting applications for the 2009-2010 Teaching Ambassador Fellowship program, which offers highly motivated, innovative public school teachers the opportunity to contribute their knowledge and experience to the national dialogue on public education. Washington

Fellows become full-time federal employees at the U.S. Department of Education in Washington, D.C., participating in policy discussions and working alongside staff on education programs and strategies aimed at educational improvement. Classroom Fellows remain in their local schools under their regular teaching contracts and provide their experience and perspectives to the Department through various assignments and part-time projects. Maximum award: fellowship compensated at the federal GS-12 level. Eligibility: state certified pre-K-12 public school teachers of all subjects who have spent at least three years in the classroom. Deadline: March 16, 2009.

www.ed.gov/programs/teacherfellowship

Nike: Jordan Fundamentals

The Jordan Fundamentals Grant Program recognizes outstanding teaching and instructional creativity in public secondary schools that serve economically disadvantaged students. Maximum award: \$10,000. Eligibility: public K-12 teachers in the U.S. Deadline: April 15, 2009.

www.nike.com/jumpman23/features/fundamentals/overview.html

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Human Resources Administrators Newsletter - March 4, 2009

Colleagues,

Hopefully, the worst weather is over and spring is on the way. There are still great challenges and demands yet to be met this school year. As we continue to face the great challenges ahead, we will keep you informed with updates. We appreciate all you do from day-to-day.

Here's the latest:

1. NEW FAMILY MEDICAL LEAVE ACT (FMLA) INFORMATION:

In November 2008, the US Department of Labor published its final rule to implement the first ever amendments to the Family Medical Leave Act (FMLA). The amendments include new military family leave entitlements and updated clarity for both workers and employers about their responsibilities and rights under the FMLA. The new military provisions are already in effect. However, the general amendments to the FMLA went into effect January 16, 2009.

Attached is the new revised 8.2 Federal Medical Leave Act of 1993 (FMLA) document containing new information as well as a compilation of links to resources to assist you in understanding and administering the amended FMLA provisions. This document has been updated on the web. In addition, we are providing the link to a FMLA Fact Sheet on policy, practice and legal update for quick reference.

www.blr.com/samples/31500900/newsletter%20sample.pdf

We encourage you to share and review the resources with your benefits administration designee(s) and should you have questions, please contact either Joan at 919.807.3366 (jcrump@dpi.state.nc.us), or Larry at 919.807.3364 (lsimmons@dpi.state.nc.us).

2. STATE HEALTH PLAN - RIF and Health Coverage:

Employees who lose their job as a result of a reduction in force (RIF) will continue to have coverage under the State Health Plan for up to twelve months, as long as the employee has twelve or more months of service and the employee was covered by the State Health Plan at the time of separation from service. Further details: www.shpnc.org/hbr-updates/february-2009/rif-and-health-care-coverage.html (Attachment)

3. PERSONNEL ADMINISTRATORS OF NC (PANC) SPRING CONFERENCE:

The PANC Spring Conference will be held on April 6-8, 2009 at the Hilton Wilmington Riverside in Wilmington, NC. To review conference information, please access: www.pancweb.org/.

4. NORTH CAROLINA GENERAL ASSEMBLY:

The 2009-2010 session of the North Carolina General Assembly convened on January 28, 2009. The website is now active. www.ncga.state.nc.us/

5. STATE BOARD OF EDUCATION WILL MEET March 3-5, 2009:

The agenda is online at: www.ncpublicschools.org/sbe_meetings/.

6. RETIREMENT PLANNING CONFERENCE SCHEDULE:

The State Retirement System is proud to partner with Prudential Retirement to provide information on the NC 401(k) and NC Deferred Compensation (457) plans at conferences across the state that are geared toward all members of the Local Governmental Employees' Retirement System and the Teachers' and State Employees' Retirement System. The conferences provide an orientation for new members, and pre-retirement planning information for members closer to retirement. Registration is not required. Some locations may charge a parking fee.

There are two presentations: one for Teachers' and State Employees' Retirement System (TSERS) members and one for Local Governmental Employees' Retirement System (LGERS) members. Note: The presentations have been updated for 2009.

Attached is the schedule of Retirement Planning Conferences. TSERS sessions will begin at 9:30 a.m. and LGERS sessions will start at 1:30 p.m. For dates please refer to the Employer section of the Retirement Systems website at www.myncretirement.com.

7. UPDATE ITEMS FROM THE FINANCIAL AND BUSINESS SERVICES (FBS) NEWSLETTER:

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8. WHAT'S NEW ON THE WEB – FEBRUARY 27, 2009 - NCDPI WEB HIGHLIGHTS: For updates, access online at www.ncpublicschools.org/whatsnew/.

Request Form for 2009 Academic Scholars Program Seals Online
The request form for seals for the 2009 Academic Scholars program is available online at www.ncpublicschools.org/studentssupport/news/.

NCDPI invites potential providers of Supplemental Educational Services (SES) to submit an application for approval. Applicants must submit a completed SES Provider application by March 27:
www.ncpublicschools.org/program-monitoring/sesresources/.

Help High School Students Earn Free College Credit:
www.ncpublicschools.org/learnandearnonline/.

9. NEWSROOM:

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ARTICLES OF INTEREST

- THE PUBLIC SCHOOL FORUM OF NC – FEBRUARY 27, 2009: A not for profit policy think tank which is a partnership of business leaders, education leaders, and government leaders in North Carolina. Since opening its doors in 1986, the Forum has evolved into an organization that has made a significant contribution to schools across North Carolina. Articles reflect current issues about the school system.
www.ncforum.org/

- PUBLIC EDUCATION NETWORK WEEKLY NEWSBLAST – February 27, 2009: For details on articles, click:
www.publiceducation.org/newsblast_current.asp

GRANT AND FUNDING INFORMATION

Do Something: Awards for Teen Do-ers

The Do Something Award honors the nation's best young world-changers - pivotal "do-ers" in their field, cause, or issue - and rewards them with a community grant, participation in a special award ceremony, media coverage, and continued support from Do Something.

Maximum award: \$100,000 community grant. Eligibility: U.S. or Canadian citizens under 25. Deadline: March 1, 2009.

www.dosomething.org/programs/awards_guidelines

NCSS: Grant for Geographic Literacy

The National Council for the Social Studies Grant for Geographic Literacy promotes geography education in the schools with the aim of enhancing the geographic literacy of students at the classroom, district, or statewide level and encouraging the integration of geography into the social studies curriculum or classroom. Maximum award: \$2,500. Eligibility: programs, not individuals, individual lessons, or units, that will enhance the geographic literacy of students at the classroom, district, or statewide levels. Recipients may be individuals or groups in school districts, public institutions, or universities. Deadline: postmarked by March 21, 2009.

www.socialstudies.org/awards/geographiclit/

Dominion Foundation: Grants for Math and Science

The Dominion Foundation is currently accepting applications for Education Partnership grants to encourage the development of new programs that strengthen math and science education through the study of energy and the environment in K-12 education. Maximum award: \$10,000. Eligibility: certain accredited public and private elementary and secondary schools and public school divisions in Connecticut, Maryland, Massachusetts, North Carolina, Pennsylvania, Ohio, Rhode Island, West Virginia, and Virginia. Deadline: May 1, 2009.

www.dom.com/about/education/grants/grants.jsp

American Honda Foundation: Grants for Youth and Scientific Education

The American Honda Foundation makes grants to K-12 schools, colleges, universities, trade schools, and other youth-focused non-profit organizations for programs that benefit youth and scientific education. Maximum award: \$60,000. Eligibility: schools and youth-focused nonprofit organizations. Deadline: Grant applications are accepted four times per year; next deadline is May 1, 2009.

<http://corporate.honda.com/america/philanthropy.aspx?id=ahf>

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Human Resources Administrators Newsletter - March 17, 2009

Colleagues,

We can't say enough how much we appreciate all you do. Please continue to contact us and keep us informed on how we can better serve you. Have a great and productive week.

Here's the latest:

1. Days Missed for Inclement Weather Survey:

All LEAs and Charter Schools are REQUIRED by Legislation to complete the Days Missed Survey for school year 2008-2009. Please complete the online survey and submit by June 1, 2009. The survey can be found on the Financial Business Services website at www.ncpublicschools.org/fbs/ under "What's New". If you have questions about the survey, please contact Ozella Wiggins at owiggins@dpi.state.nc.us or 919.807.3757.

2. STATE HEALTH PLAN - ANNUAL ENROLLMENT:

The dates for Annual Enrollment have not yet been finalized. In order to avoid two enrollments, the State Health Plan will wait to conduct Annual Enrollment until after the State Health Plan bill is signed into law. An HBR alert announcing Annual Enrollment will be issued. Enrollment kits will be posted on the State Health Plan web site and will be mailed to all currently enrolled members shortly after the bill is signed. The link for the SHP newsletter is www.shpnc.org/images/HBR_Update/HBRNews_Mar09.html.

3. PANC SPRING CONFERENCE:

The Personnel Administrators of North Carolina (PANC) Spring Conference will be held on April 6-8, 2009 at the Hilton Wilmington Riverside in Wilmington, NC. To review conference information, please access: www.pancweb.org/.

4. Legislative News from Jones Street - March 13, 2009:

Updates for Bill Activity for Week of March 9-13, can be accessed at: www.ncpublicschools.org/legislative/details?view=legislature&id=6.

5. STATE BOARD OF EDUCATION WILL MEET March 31 - April 2, 2009:

The agenda is online: www.ncpublicschools.org/sbe_meetings/.

6. THE FINANCIAL AND BUSINESS SERVICES (FBS) NEWSLETTERS:

The Newsletters for Finance Officers and Personnel Administrators are posted online: www.ncpublicschools.org/fbs/resources/newsletters/.

- Annual Leave payout rate of pay:

Please remember when calculating annual leave or bonus leave payout for a school based employee on the 215 day calendar that the daily rate of pay is always calculated as 1/22 of the employee's full monthly pay line.

For all other types of employees, the annual leave or bonus leave payout daily rate is variable based on the work days in the month that the employee leaves. (For a variable employee who retires March 1, the payout is made on the employee's last workday at the end of February at a daily rate of 1/20 of the monthly salary, while for an employee who retires April 1, the payout is made the end of March at a daily rate of 1/22 of the monthly salary.)

All employees are paid out for only the number of days in their annual leave balance, up to a maximum of 30 days. The balance is not to be spread over weekends and holidays to increase the number of days paid out. Should you have questions please contact Ally Barfield at abarfield@dpi.state.nc.us.

- Governor's Recommended Budget:

Governor Purdue released her budget recommendations for the FY 2009-2011. Following is the web link that provides the detail of each line item: www.osbm.state.nc.us/ncosbm/osbm_library/superpubs/bqt0911.shtm.

In addition, we have attached a comparison of the Governor's recommendations and the State Board of Education's request. We will update this file as the budget continues through the legislative process like we do each year.

Step Increase –

The step increase is in the budget for personnel paid on the Teacher, Assistant Principals and Principals salary schedules.

Longevity and Bonus Leave –

For FY 2009-2011 the governor proposes a freeze to teacher and state employee longevity payments for two years, saving about \$170 million per year of the biennium. Teachers' and state employees' final retirement calculations will be held harmless from this longevity reduction. State employees who are not on the Teacher Salary Schedule will receive bonus leave for each year of the biennium in lieu of longevity payments. The amount of bonus leave is commensurate to the employee's years of service in state government.

Flexible Reduction –

The budget recommendation includes a \$144 million reduction to be at the discretion of the LEA of where the cuts are to be made within their allocations.

The cut equates to a \$98.30 reduction per ADM. Attached is a list of the impact to the local education agencies.

Please understand, the items in the Governor's recommended budget may or may not be part of the final budget passed by the General Assembly. Again, we will keep you posted of changes that may occur due to General Assembly action.

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- PUBLIC EDUCATION NETWORK WEEKLY NEWSBLAST - MARCH 13, 2009: For details on articles, click: www.publiceducation.org/newsblast_current.asp.

Retooling our global edge

In his first address to deal exclusively with education, President Barack Obama proposed lengthening the school year and increasing pay for high-performing teachers to regain an American edge in the world economy, Reuters reports. "Despite resources that are unmatched anywhere in the world, we have let our grades slip, our schools crumble, our teacher quality fall short, and other nations outpace us," Mr. Obama told the U.S. Hispanic Chamber of Commerce. "The future belongs to the nation that best educates its citizens, and my fellow Americans, we have everything we need to be that nation." To fulfill this potential, the president outlined a "cradle-to-career" plan that expanded early childhood programs and gave more money to states that raised student standards, tracked student progress, and cut drop-out rates. The president made clear that his administration will put the full weight of the federal government behind the reforms, tripling funds for education in the 2010 fiscal

year beginning October 1. "In a 21st-century world where jobs can be shipped wherever there's an internet connection, where a child born in Dallas is competing with children in Delhi... education is no longer just a pathway to opportunity and success, it is a prerequisite," he said.

Bureaucracy can't teach

School reformers for decades have tried different ideas and techniques to try to make schools work better. All these reforms have been based on an unspoken assumption: that better organization is the key to fixing whatever ails schools. The theory is that by imposing more organizational requirements -- better teacher credentials, more legal rights, detailed curricula, the pressure of tests -- schools will get better. That's the theory. The effect, however, is to remove the freedom needed to succeed at any aspect of teachers' responsibilities -- how they teach, how they relate to students, and how they coordinate their goals with administrators. The extent and effects of bureaucracy may indeed surprise people from the real world, writes Philip K. Howard, a civic leader and public policy activist, in his lively new book, "Life Without Lawyers."

The battle over "21st-century" skills

At least 10 states have committed to "21st-century skills" -- the idea that kids need to think critically and creatively, be technologically savvy, and work well with others, according to USA TODAY. The idea is now commonplace in curriculum reform, but a group of education scholars fears the trend is eating up classroom time better spent learning essential content. The issue, they say, is whether kids learn to think by reading great literature, doing difficult math, and learning history, philosophy, and science -- or if they can tackle those on their own if schools teach them to problem-solve, communicate, use technology, and think creatively. The 21st-century skills movement is "a fragmented approach with uncertain cognitive goals," according to E.D. Hirsch, Jr., founder of the Core Knowledge Foundation and author of a series of books on what students should learn year-by-year in school. Most likely to suffer, he says, are low-income students, who get less background information in history, science, and literature at home than middle-class students. Ken Kay, co-founder of the Arizona-based Partnership for 21st Century Skills, calls criticisms by Hirsch and others "a sideshow that distracts people from the issue at hand: that our kids need world-class skills and world-class content." Kay notes that virtually all of the industrialized countries with which the USA competes "are pursuing both content and skills."

Working for professional development that works

Professional development (PD) in education is a "tarnished brand" whose consumers are "angry," "unsatisfied," and "resigned," according to Hayes Mizell in an article in the spring issue of JSD, a publication of the National Staff Development Council. PD's brand, which he poses as a group of associations

and experiences unintentionally built up over decades, must change its "context, content, and process" if it is to be something educators will value and consume. This will happen, Mizell writes, if educators knowledgeable about PD through personal study, conferences, and collegial networking become advocates for PD reform. "The most direct and naturalistic approach [to this advocacy] is through informal conversation. In one-on-one or small group exchanges, advocates for a new brand of professional learning can begin by casually raising the subject of staff development." The focus should be on whether educators consider their professional development to be useful and how it can be more so, even in schools with recent innovations like instructional coaches and learning communities. Advocates can eventually approach other educators in positions of authority with specific, workable proposals, and move on to civic groups and institutions to engage the public over strategies to make professional development more effective.

Choosing pragmatic experimentation over rigid ideology

The Century Foundation has released "Educational Strategies That Work," which examines Oklahoma's universal pre-K program; the voluntary inter-district transfer program in St. Louis, Missouri; and New Jersey's innovative, low-income "Abbot" public schools. The brief is a response to President Obama's declared intention to identify, support, and expand successful domestic programs and eliminate those that don't work. In each program examined in the brief, "the ideas pursued were an outgrowth of pragmatic experimentation, as opposed to adherence to rigid ideology," writes Greg Anrig, vice-president for policy at the foundation and author of the paper. Anrig suggests the federal government should create incentives for states and localities to pursue similar strategies, and launch an active campaign to explain their implementation across the country. "All of these ideas would promote long-term, broadly shared benefits, and at least in some cases, have the dual virtue of helping to create productive jobs during a period when the United States is experiencing what may be the worst economic crisis since the Great Depression," Anrig states in his introduction.

- GRANT AND FUNDING INFORMATION

Get free donations of classroom supplies

Rather than reach deeper into their own pockets, a few creative educators are waging grassroots fundraising efforts. In this Edutopia article, educators share tips for stocking up -- without reaching into their own wallets. Some strategies are controversial, but all are worth considering.

www.edutopia.org/free-school-supplies-fundraising-donation

Project Learning Tree: Green Works!

Project Learning Tree GreenWorks! gives grants for community action and service-learning projects. GreenWorks! projects should address an

environmental issue, and can involve students from preschool to high school in hands-on community action. Maximum award: \$5,000. Eligibility: applicant must have received training in PLT; youth must implement the project; project must integrate student learning and community service; project must include at least one community partner, such as a local organization or business; project must acquire 50 percent matching funds. Deadline: April 30, 2009.

www.plt.org/cms/pages/21_22_18.html

NEA Foundation: Learning & Leadership Grants

NEA Foundation Learning & Leadership Grants support public school teachers, public education support professionals, and/or faculty and staff in public institutions of higher education for one of two purposes: grants to individuals fund participation in high-quality professional development experiences, such as summer institutes or action research; grants to groups fund collegial study, including study groups, action research, lesson study, or mentoring experiences for faculty or staff new to an assignment. Maximum award: \$5,000. Eligibility: public school teachers grades K-12; public school education support professionals; or faculty and staff at public higher education institutions. Deadline: June 1, 2009.

www.neafoundation.org/programs/Learning&Leadership_Guidelines.htm

The National Association of Independent Schools: Challenge 20/20 Partnership
The National Association of Independent Schools invites schools to participate in Challenge 20/20, a program that brings together two schools: one from the United States and one from outside of the United States. Teacher-student teams from both schools work together throughout the fall 2009 school semester to come up with a solution to a global problem. Challenge 20/20 is based on Jean François Rischard's book, "High Noon: 20 Global Problems, 20 Years to Solve Them." Maximum award: program participation. Eligibility: all U.S. schools, elementary and secondary, public or private. Deadline: August 17, 2009.

www.nais.org/resources/index.cfm?ItemNumber=147262

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Human Resources Administrators Newsletter - April 2, 2009

Colleagues,

Please continue to contact us and keep us informed on how we can better serve you. We look forward to seeing everyone at PANC next week. Don't forget to register.

Here's the latest:

1. PERSONNEL ADMINISTRATORS OF NC (PANC) SPRING CONFERENCE:

The Personnel Administrators of North Carolina (PANC) Spring Conference will be held on April 6-8, 2009 at the Hilton Wilmington Riverside in Wilmington, NC. To review conference information, please access: www.pancweb.org/.

2. SCHOOL ACTIVITY REPORT TERMINATION DATE:

Three important dates have now been established pertaining to the School Activity Report for 2008-2009.

- April 2, Noon - Deadline for data to be included on second NCLB Rough Cut
- April 9 - Release of the second NCLB Rough Cut on the LicSal Website
- April 29 - Last SAR data transfer via AS400 (SIMS method)
- April 30, Noon - Last acceptance of SAR Data for 2008-2009 (NCWISE Method)

If you have questions or concerns, please contact Scott Douglass at sdouglass@dpi.state.nc.us or 919.807.3737. Please see attachment for further details.

3. STATE HEALTH PLAN BULLETIN - RIF AND HEALTH COVERAGE:

Employees who lose their job as a result of a reduction in force (RIF) will continue to have coverage under the State Health Plan for up to twelve months, as long as the employee has twelve or more months of service and the employee was covered by the State Health Plan at the time of separation from service.

Employees may continue coverage for their eligible dependents during this 12-month period. The employee and any dependents will remain on the employing unit's billing statement while receiving RIF benefits. The employing unit is responsible for collecting and remitting any applicable premiums.

The State Health Plan will allow employees who have been RIF'd to change their health plan coverage (move from 80/20 to 70/30) and coverage type (employee-family to employee only), as long as the request is made within 30 days from the date of separation from service. Please indicate in the comments field (line 16) on the Change Form (C48) that the change is due to RIF, and designate the plan option in which the member would like to

enroll. For an example of the Change Form correctly completed: www.shpnc.org/hbr-updates/february-2009/change-form-example.pdf.

Employees who elect not to continue coverage under RIF immediately following separation may not obtain coverage at a later date.

After one year, the former employees and their eligible dependents may continue health coverage on a fully contributory basis. Former employees who choose to continue their coverage after their initial 12 months will be directly billed by Blue Cross Blue Shield of North Carolina.

Employees who do not have 12 months of consecutive service may continue health care coverage at full cost under COBRA (for themselves and any eligible dependents). (Attached)

4. STATE BOARD OF EDUCATION

Met March 31 - April 2, 2009: The agenda is online at: www.ncpublicschools.org/sbe_meetings/.

5. UPDATE ITEMS FROM THE FINANCIAL AND BUSINESS SERVICES (FBS) NEWSLETTER:

The Newsletters for Finance Officers and Personnel Administrators are posted online. For details click: www.ncpublicschools.org/fbs/resources/newsletters/.

6. WHAT'S NEW ON THE WEB - MARCH 13, 2009 - NCDPI WEB HIGHLIGHTS:

For updates, access online at: www.ncpublicschools.org/whatsnew/.

7. NEWSROOM:

The Communications and Information Division provides the online newsroom as a central resource of news and current information about K-12 education events, report releases and other initiatives in North Carolina public schools:

www.ncpublicschools.org/newsroom/. (Check weekly for current updates)

8. SCHOOL CYBERLAW SYMPOSIMS - April 29-30 (NC) and May 12 (SC).

The symposium will examine system-wide, comprehensive policies and practices that help ensure a systematic approach to legally integrating technology in schools and avoiding common pitfalls. For details: <http://lex-is.com/index.php?page=programs>.

ARTICLES OF INTEREST

- THE PUBLIC SCHOOL FORUM OF NC:

A not for profit policy think tank which is a partnership of business leaders, education leaders, and government leaders in North Carolina. Since opening its doors in 1986, the Forum has evolved into an organization that has made a significant contribution to schools across North Carolina. Articles reflect current issues about the school systems. Further details: www.ncforum.org/.

- PUBLIC EDUCATION NETWORK WEEKLY NEWSBLAST - MARCH 27, 2009:

For details on articles, click: www.publiceducation.org/newsblast_current.asp.

- Teaching to tests that are worth teaching to
- New recognition for multiracial children
- A snapshot of American literacy
- New recognition for multiracial children
- Pre-K nationally: middle-class kids left behind

- GRANT AND FUNDING INFORMATION

[Driver's Edge: Driving Instruction for Teens](#)

Driver's Edge empowers young drivers through a combination of classroom discussions and behind-the-wheel defensive driving instruction to erase the "Fast and the Furious" and video-game mentality that many of today's young drivers have and that has skyrocketed automobile fatalities. The program is free. Eligibility: students between the ages of 15 and 21 who have a learner's permit or driver's license. Deadline: see tour schedule for relevant dates.

www.driversedge.org/

[Nokia/YouthActionNet: Global Fellows](#)

YouthActionNet Fellows are social entrepreneurs who participate in a week-long capacity-building workshop whose key focus is facilitating peer-to-peer learning and networking opportunities. Participants develop a customized learning plan based on individual leadership learning needs and focused on six dimensions of leadership: personal, visionary, political, collaborative, organizational, and societal. Eligibility: youths 18-29 as of November 1, 2009; applicants should be founders of existing projects/organizations, or leading a project within an organization. Maximum award: all-expenses-paid retreat, November 1-8. Deadline: April 15, 2009.

<http://youthactionnet.org/index.php?fuse=aboutfellowship>

[Student Awards for Creative Nonfiction](#)

The Norman Mailer Writers Colony and the National Council of Teachers of English is sponsoring the Norman Mailer High School and College Writing Awards, which in 2009 will be given for creative nonfiction. Maximum award: \$5,000; travel and lodging to the Norman Mailer Writers Colony's National Awards Ceremony. College winner will also

receive a scholarship to the Norman Mailer Writers Colony for 2010. Eligibility: high school students who will be seniors in fall 2009; college students who will be seniors, juniors, or sophomores in fall 2009. Deadline: May 1, 2009.

www.ncte.org/awards/student/nmwa

Rosetta Stone: Communicate and Connect

The Rosetta Stone Communicate and Connect Scholarship invites high school seniors that have learned English as a Second Language to write about discovering the world of possibilities that learning the English language opened up to them. Sample essay topics include how learning English enabled excellence in other courses, such as mathematics or science; a personal memoir about how getting cast in a play because of English-speaking abilities awakened a desire to perform and to create; and an examination of how learning English transformed your perspective of life in the United States.

Maximum award: \$3,000 scholarship for continuing education purposes. Eligibility: high school seniors graduating in spring of 2009 that learned English as a second language. Deadline: May 15, 2009.

www.rosettastone.com/scholarship

Youth Award for Outstanding Activism in Environmental and Social Justice

The Earth Island Institute Brower Youth Award recognizes young people for their outstanding activism and achievements in the fields of environmental and social justice advocacy. Maximum award: \$3,000, a trip to California for the awards ceremony, and a wilderness camping trip. Eligibility: youth ages 13-22. Deadline: May 15, 2009.

www.broweryouthawards.org/article.php?list=type&type=12

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Human Resources Administrators Newsletter - April 13, 2009

Colleagues,

Hope everyone had a great holiday. I am providing the following updated information to assist you as the changes take place.

1. HEALTH BENEFITS REPRESENTATIVE (HBR) ALERT UPDATE FOR COBRA SUBSIDY:

On February 17, 2009, President Obama signed into law the American Recovery and Reinvestment Act of 2009 (ARRA). This act provides for COBRA premium reductions and additional election opportunities. Eligible individuals pay only 35 percent of their COBRA premiums and the remaining 65 percent is reimbursed through an employer tax credit.

- Changes Regarding COBRA Continuation Coverage Under ARRA

Premium Reduction: The premium reduction for COBRA continuation coverage is available to "assistance eligible individuals".

An "assistance eligible individual" is the employee or a member of his/her family who:

- is eligible for COBRA continuation coverage at any time between September 1, 2008 and December 31, 2009;
- elects COBRA coverage; and
- is eligible for COBRA as a result of the employee's involuntary termination between September 1, 2008 and December 31, 2009.

Those who are eligible for other group health coverage (such as a spouse's plan) or Medicare are not eligible for the premium reduction. There is no premium reduction for premiums paid for periods of coverage prior to February 17, 2009.

ARRA treats assistance eligible individuals who pay 35 percent of their COBRA premium as having paid the full amount. The premium reduction (65 percent of the full premium) is reimbursable to the employer as a credit against certain employment taxes. If the credit amount is greater than the taxes due, the Secretary of the Treasury will directly reimburse the employer.

- State Health Plan Process - Abbreviated Summary

Retroactive Process for Individuals Involuntarily Terminated Between September 1, 2008 and February 16, 2009

The State Health Plan will issue the COBRA subsidy notice to all individuals that received a COBRA notice from September 1, 2008 to February 16, 2009. For employees who lost their job due to a reduction in force (RIF), the HBR will need to complete the

attached RIF spreadsheet and return it to BCBSNC. BCBSNC will mail a COBRA subsidy notice to these RIF employees. These notices will be mailed prior to April 17, 2009.

- Ongoing Process for Individuals Involuntarily Terminated after February 16, 2009

On an ongoing basis, BCBSNC will issue the COBRA subsidy notice along with the normal COBRA offer letter to all COBRA eligible individuals. HBR's will need to continue to complete the RIF spreadsheet for employees who lose their job due to a RIF after February 16, 2009 and return the spreadsheet to BCBSNC.

The complete processes are outlined in attached documents along with FAQs and the question and answers on what constitutes involuntary termination from the IRS Notice 2009-27. All of the documents that will be sent to former employees will be posted on the SHP Web site early next week.

For additional information on ARRA go to the Department of Labor Web site at www.dol.gov/ebsa/cobra.html or the Internal Revenue Web site at www.irs.gov/newsroom/article/0,,id=204505,00.html.

2. CHANGE TO REVISED GRADUATE PAY POLICY:

At the December 4, 2008, meeting of the State Board of Education (SBE), the Board approved revisions to the graduate pay policy that recognized all graduate degrees earned through regionally accredited institutions for salary purposes. This provision was to go into effect July 1, 2009.

Based on the state of the economy, the SBE approved at their April board meeting to delay the implementation of this policy change until July 1, 2010, rather than implementing the policy change on July 1, 2009, as previously approved.

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Human Resources Administrators Newsletter Brief Update - April 22, 2009

Colleagues,

Brief Update:

Days Missed for Inclement Weather Survey: All LEAs and Charter Schools are **REQUIRED** by Legislation to complete the Days Missed Survey for school year 2008-2009. Please complete the online survey and submit by June 1, 2009. The survey can be found on the Financial Business Services website at www.ncpublicschools.org/fbs/ under "What's New". If you have questions about the survey, please contact Ozella Wiggins at owiggins@dpi.state.nc.us or 919.807.3757.

Emergency Cash Flow Directive:

Many of you have contacted us with questions regarding the memos concerning the State Cash Flow Emergency. Thank you for your patience and understanding as we try to respond to all the questions. We have compiled the questions we received in the last 48 hours into one document and posted the Q&A on the website www.ncpublicschools.org/fbs/ (under "What's New"). For questions specifically related to transportation, please see the "Memo to Transportation Directors". We will update this regularly as we receive more questions. We hope that this will provide guidance to you and your staff during these trying times.

If you have questions contact Alexis Schauss at aschauss@dpi.state.nc.us or 919.807.3553.

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Human Resource Administrators Newsletter - May 22, 2009

Colleagues,

1. The General Assembly is still in session. Last Thursday, May 14th was the last day for crossover. Through their continued pursuit, these are the current updates on some bills of interest:

- HB 94 was passed earlier, an act to amend the definition of retirement to clarify that service as an unpaid volunteer in a local school administrative unit is not considered service. This bill will give new retirees the opportunity to return to schools as unpaid bona fide volunteers. We are currently working out the details of clarity on the impact of this bill and how it should be administered along with a Q&A. This information should be forthcoming very soon.
- HB 917 an act to make the effect of executive order number eleven applicable to the legislative and judicial branches and to protect state employees under this order. For further details: The full Ratified Bill can be read at www.ncleg.net/Sessions/2009/Bills/House/PDF/H917v4.pdf
- HB956 – An act to modify the provision that permitted retired Teachers to return to the classroom without a loss of retirement benefits. We have received quite a few questions in reference to this bill. This bill is due to Sunset October 1, 2009. As soon as we have confirmation on the status of this bill, we will communicate the information to the field along with additional information on how to address the issue on re-employed retirees. Hopefully, this information will be forthcoming soon.
- The House Appropriations Committee on Education discussed their budget proposal yesterday afternoon. The attached outlines major reductions to all areas of Education.

Stay in touch with Legislative News from Jones Street:

www.ncpublicschools.org/legislative/archives/details?year=2008&id=0&p=1&orderBy=report_date&order=DESC&view=legislature

2. RETIREMENT SYSTEMS MONITOR, MAY 15, 2009 - Monthly Reporting Data Change to Enhance Service Credit Accuracy for Education Employees:

In order to ensure that retirement service credit is accurately and equitably reported and credited for all education employees, the following changes will be implemented: Effective August 1, 2009, for your July 2009 ORBIT report, the Retirement System will ask you to report a "retirement service type" and a "retirement service period" instead of a "contract type" and "contract period" for each employee. For further details, please see attached.

3. STATE BOARD OF EDUCATION MET MAY 5 – 7, 2009: The agenda is online at: www.ncpublicschools.org/sbe_meetings/. Actions Items Approved:

- *2009-2010 Writing Instruction Plan (GCS 2)* – Proposed adjustments to the 2009-10 Writing Instruction Plan were approved.
- *Changes to Policy Providing Annual Performance Standards Under the ABCs Model (GCS 3)* – Proposed amendments to State Board Policy HSP-C-021 were approved.
- *Changes to North Carolina's NCLB Consolidated State Application Accountability Workbook (GCS 4)* – Based upon approval of the US Department of Education, Board members approved changes to North Carolina's NCLB Consolidated State Application Accountability Workbook.
- *Occupational Course of Study – Proposed Temporary Waiver of Paid Employment Graduation Requirement (GCS 6)* – Board members approved amending temporarily the Occupational Course of Study.
- *Temporary Policy for Flexible Furlough Leave (TCS 3)* – A temporary policy addressing flexible furlough leave was approved. Full-time public school employees may take 10 hours of flexible furlough leave between May 1, 2009 and Dec. 31, 2009. The leave, which may be taken in any increment, must be coordinated through the employee's immediate supervisor or principal. Classroom teachers, media specialists and teacher assistants who require substitutes or bus drivers may not use flexible furlough leave at any time that students are scheduled to be in attendance. The furlough is in recognition of the .5% reduction in state employees' and school employees' annual salary. More guidance is online at www.ncpublicschools.org/fbs.
- *Principal and Teacher Evaluation Instrument State Level Ratings (TCP 1)* – Board members approved identifying and adopting a process whereby a random sample of principal ratings utilizing the North Carolina Principal Evaluation Instrument and a random sample of teacher ratings utilizing the North Carolina Teacher Evaluation Instrument would be collected and analyzed.

For further details: www.ncpublicschools.org/stateboard/highlights/2009/05highlights

4. UPDATE ITEMS FROM THE FINANCIAL AND BUSINESS SERVICES (FBS) NEWSLETTERS: The Newsletters for Finance Officers and Personnel Administrators are posted online. For details click on www.ncpublicschools.org/fbs/resources/newsletters/

HB917 is law. The full Ratified Bill can be read at www.ncleg.net/Sessions/2009/Bills/House/PDF/H917v4.pdf.

Two significant items of the Bill:

Section 2: Related to retirement contributions. The Retirement fund will receive both the employer and employee contribution related to the 0.5% reduction.

Section 8: All employees, regardless of funding source, are now subject to the pay reduction, including locally funded.

Yesterday, the Retirement Office sent communication to the LEAs stating that employee gross pay (without the furlough reduction) must be reported, and the retirement contributions must be pre reduction. In April, DPI advised the LEAs based on directions received from the State Budget Office, but these directions are now not inline with the Retirement Office's directions. The legislation is clear that we must now pay the retirement amounts and we are in the process of talking with the Retirement Office and the vendors to come up with an acceptable process to adhere to the legislation. **We understand that the LEAs are in the late stages of May payroll and preparing for year end. At this point, you should continue with the reduction directions previously provided i.e. R47.** We will keep you informed.

Reduction to Allotments related to the 0.5%:

Executive Order #11 requires the pay reduction of all employees of 0.5% of their annual salary. This reduction is necessary in order to ensure that the State's 2008-09 budget is balanced. To ensure that the pay reduction to public school employees results in the intended consequences of Executive Order #11, allotments will be reduced. The Division of School Business has calculated a dollar amount for each PRC for each LEA. This calculation is 0.5% of the year-to-date salary expenditure for the LEA for the PRC. The resulting dollars were then assessed and materiality determined. The following PRCs were deemed to include material salary expenditures and will be reduced.

- PRC 002 Central Office
- PRC 003 Non instructional support
- PRC 027 Teacher Assistants
- PRC 031 Low wealth
- PRC 032 Exceptional Children
- PRC 056 Transportation
- PRC 069/068 At risk

The attached file provides the amount by LEA, by PRC. If you have further questions, please contact Alexis Schauss at aschauss@dpi.state.nc.us.

Furlough Update:

VIF employees are included in the furlough.

Attached is an updated Q&A on the Furlough. It is also online at www.ncpublicschools.org/fbs. You may contact Alexis Schauss with questions at aschauss@dpi.state.nc.us.

Budget Freeze - Driver Education Cars:

A few LEAs had ordered Driver Education cars prior to the budget freeze and had asked if they could receive these cars. DPI has received a waiver for these cars based on the fact that the cars are special order and the orders can not be canceled. If you ordered a car prior to April 9th, you may receive and pay for that car from state funds if there is no cancellation option. There is a Budget Freeze Q&A online at www.ncpublicschools.org/fbs. If you have questions contact Alexis Schauss at aschauss@dpi.state.nc.us.

Transportation Reimbursements for 2008-2009:

Any expenditure of state Transportation funds (PRC56) to provide transportation other than to-and-from-school and mid-day IEP-required transportation must be reimbursed from the funding source of the relevant program. Please ensure that these reimbursements are up-to-date by the end of May, 2009. Reimbursements should also be done weekly or bi-weekly in June, 2009, to ensure payment within the current fiscal year. Questions about the allowable use of school buses (covered by the state Tort Claims Act) and reimbursements can be found in the following document: www.ncbussafety.org/documents/buses/TortReimbursements.pdf

If you have questions contact Derek Graham at 919.807.3571.

5. STATE HEALTH PLAN HBR UPDATE: State Health Plan annual enrollment for the 2009/2010 benefit year is now underway. Annual Enrollment will conclude on May 29. Annual Enrollment for Wake County Schools will conclude on June 1.

- All annual enrollment kits have been mailed to members. Please remind your employees that they should allow time for the kits to be delivered to their homes.
- Annual enrollment kits are available for members to download and print from the [State Health Plan Web site](#).
- It is not necessary to stockpile annual enrollment kits.
- Due to the shortened timeframe for annual enrollment this year, it is imperative that HBRs send all completed forms to Blue Cross and Blue Shield of North Carolina (BCBSNC) as soon as they are received and processed. (They should not be held until the end of annual enrollment).

Please remember that members do not need to do anything during annual enrollment unless they wish to make changes. *Exception: Charlotte-Mecklenburg Public School employees must enroll electronically during the annual enrollment period in order to maintain coverage.*

6. WHAT'S NEW ON THE WEB - MARCH 13, 2009 - NCDPI WEB

HIGHLIGHTS: For updates, access online at www.ncpublicschools.org/whatsnew/

7. NEWSROOM: The Communications and Information Division provides the online newsroom as a central resource of news and current information about K-12 education events, report releases and other initiatives in North Carolina public schools on the following: (Check weekly for current updates)

www.ncpublicschools.org/newsroom/

ARTICLES OF INTEREST

THE PUBLIC SCHOOL FORUM OF NC – MAY 8, 2009:

The Forum is a not for profit policy think tank which is a partnership of business leaders, education leaders, and government leaders in North Carolina. Since opening its doors in 1986, the Forum has evolved into an organization that has made a significant contribution to schools across North Carolina. Articles reflect current issues about the school system. For details: <http://www.ncforum.org/>.

PUBLIC EDUCATION NETWORK WEEKLY NEWSBLAST – MAY 15, 2009:

For details on articles, click: www.publiceducation.org/newsblast_current.asp.

- New insight on females and 'math phobia': overcoming 'stereotype threat'
- Study indicates less-known learning disorder with significant impact
- A case for student analysis of 'To Kill A Mockingbird'
- A rapidly growing demographic that needs immediate intervention

GRANT AND FUNDING INFORMATION

Dollar General Stores: Youth Literacy Grants

Dollar General Youth Literacy Grants provide funding to schools and local nonprofit organizations to help with the implementation or expansion of literacy programs for new readers, below-grade-level readers, and readers with learning disabilities. Maximum award: \$3,000. Eligibility: Schools and non-profits located in Dollar General's 35-state operating territory and within 20 miles of the nearest Dollar General Store. Deadline: May 22, 2009.

www.dollargeneral.com/servingothers/Pages/GrantPrograms.aspx

ePals, Inc.: free In2Books curriculum

In2Books, the curriculum-based e-mentoring program from ePals, Inc., will be offered for free to some Title I schools. Students participating in In2Books select and read age-appropriate, high-quality books from a list compiled by a team of children's literature experts. The students are matched with carefully screened adult pen pals who read the same books as the students. After reading each book, students and their pen pals exchange thoughts about the important issues in the book via online letters. Teachers reinforce these activities in the classroom with related lessons and discussion. Maximum award: the online program, books and professional development (valued at more than \$500). Eligibility: all 3rd-5th grade classrooms in Title I schools from any one district.

<http://in2books.epals.com/login.aspx?ReturnUrl=%2fdefault.aspx>

Gale/Library Media Connection: TEAMS Award

The Gale/Library Media Connection TEAMS Award recognizes and encourages the critical collaboration between the teacher and media specialist to promote learning, increase student achievement and develop 21st century skills. Maximum award: \$2,500. Eligibility: All K-12 public and private schools in the United States and Canada. Deadline: June 15, 2009.

www.galeschools.com/pdf/TEAMS-form.pdf

Public Welfare Foundation: Grants for Organizations that Serve Disadvantaged Communities

The Public Welfare Foundation supports organizations that address human needs in disadvantaged communities, with strong emphasis on organizations that include service, advocacy, and empowerment in their approach. The Foundation provides both general support and project-specific grants. Maximum award: \$50,000. Eligibility: public and private entities, including nonprofit organizations and for-profit organizations. The foundation is currently focusing on three program areas: criminal and juvenile justice, health reform, and workers' rights. Deadline: July 29, 2009.

www.publicwelfare.org/ApplyGrant/Guidelines.aspx#deadlines

Adobe Youth Voices /What Kids Kids Can Do: International Photo Competition

Adobe Youth Voices and What Kids Kids Can Do invite youth around the world to submit photographs based on the theme of "Crisis and Hope," expressing themselves on both what is challenging and what gives hope in today's difficult world. Maximum award: Winning photographs will be showcased online, in a traveling exhibit, and in a book. Eligibility: all young people -- anywhere in the world -- between the ages of 12 and 19. Deadline: July 31, 2009.

www.wkcd.org/AYV_Photo_Competition/Home_.html

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Human Resource Administrators Newsletter - June 24, 2009

Colleagues,

Hope everyone had a great and successful school year in spite of all of the challenges and demands you had to face.

It is with mixed emotions to officially inform everyone of a delayed announcement of Larry Simmons departure from DPI - School Personnel Support. Larry has taken a position in Fayetteville. His new position will be involved with the Civil Workforce Development Program which is involved with the base realignment at Fort Bragg.

I know for many it is hard to believe that Larry is no longer with DPI. He will greatly be missed by his presence, encouragement, professionalism and most of all how he so greatly supported his customers and touched so many lives of the public school system.

We all had hoped that he would reconsider and withdraw his letter of resignation, but Larry felt it was time to share his great attributes with others and the pleasure to have to drive only 11 miles to his new office was very enticing.

Larry in his short tenure but a much endowed one has represented the Agency very well as Section Chief of School Personnel Support. His challenges were huge over the years and he met each challenge head on and conquered each of them with professionalism. We have lost a great employee and a conduit to the LEAs Human Resource Offices. I know we all wish him the best in his new endeavor.

Here's the latest:

1. 2009 FINANCIAL & BUSINESS SERVICES SUMMER CONFERENCE:

The FBS Conference will take place July 30th at the [Sheraton Imperial Hotel & Convention Center](#), Research Triangle Park, NC. The conference will provide essential information about new and continuing financial and personnel policies that impact local education agencies and charter schools.

Conference, registration, and hotel information is available on our web site at www.ncpublicschools.org/fbs/conferences/. If you have any questions about the conference, please contact Paul LeSieur or Doris McCain at 919.807.3700.

2. The General Assembly is continuing to work on the budget.

Through their continued pursuit, these are the current updates. Somewhat some good news: Lawmakers from both the Senate and the House announced on last Thursday that they are assembling a two-year budget that raises much of the money Governor Perdue is calling for in order to avoid some of the deepest proposed cuts to state government. Budget negotiators have been working several hours a day trying to narrow differences between the House and Senate spending plans in education. The goal is to get a final spending plan to Governor Perdue prior to the new fiscal

year beginning on July 1, 2009. The Education Subcommittee Chairs have been instructed to turn in the Conferee Recommendations to the full Appropriations Chairs on Monday (June 22, 2009).

- HB 94 was passed earlier, an act to amend the definition of retirement to clarify that service as an unpaid volunteer in a local school administrative unit is not considered service. Effective March 26, 2009, this bill will give new retirees the opportunity to return to schools as unpaid bona fide volunteers. We are currently working out the details of clarity on the impact of this bill and how it should be administered along with a Q&A. This information pending SBE approval and should be forthcoming soon.
- HB 2436, Section 26.21.(a) provides for classroom teachers and media specialists who require substitutes to use up to one (1) day of personal leave during the 180 instructional days per year, and receive full salary without a deduction for a substitute. This provision expires June 30, 2009. Final memo and Q&A should be forthcoming soon.
- HB 956 – An act to modify the provision that permitted retired Teachers to return to the classroom without a loss of retirement benefits. We have received quite of few questions in reference to this bill. This bill is scheduled to Sunset on October 1, 2009. As soon as we have confirmation on the status of this bill, we will communicate the information to the field along with additional information on how to address the issue on re-employed retirees. This Bill at this point has not been up for discussion. Hopefully, the final information will be forthcoming soon.
- HB 482, SECTION 1. G.S. 115C-336 has been ratified and signed by the Governor. This Bill has been amended by adding a new subsection to read:
an act relating to the reinstatement of unused sick leave when an employee who was employed on a 10-month contract at the time of separation returns to employment on a 10-month contract. Under these rules, the maximum period of separation after which unused sick leave is reinstated shall be three calendar months longer for school personnel employed on a 10-month contract than for school personnel employed on a 12-month contract."
This act becomes effective July 1, 2009.
- HB 213, SECTION 1. G.S. 126-8.3 an act to require the adoption of rules and policies for the Voluntary Shared Leave Program that will permit the donation of sick leave to a non-family member recipient for state employees subject to the State Personnel Act, Public School employees and Community Colleges employees.

NOTE: Stay in touch with Legislative News from Jones Street:
www.ncpublicschools.org/legislative/index?view=legislature.

3. RETIREMENT PLANNING CONFERENCES:

The Educational Retirement Group of the Retirement Systems Division with the Department of State Treasurer conducts retirement conferences for members of the Teachers' and State Employees' Retirement System and the Local Governmental Employees' Retirement System.

The conferences provide an orientation for new members, and pre-retirement planning information for members closer to retirement. The sessions also offer information on the N.C. 401(k) and N.C. Deferred Compensation (457) plans. Registration is not required. Some locations may charge a parking fee. Please see attached schedule.

4. STATE BOARD OF EDUCATION MEETS JULY 7 - 9:

The agenda is online at: www.ncpublicschools.org/sbe_meetings/.

5. UPDATE ITEMS FROM THE FINANCIAL AND BUSINESS SERVICES (FBS) NEWSLETTER:

The Newsletters for Finance Officers and Personnel Administrators are posted online. For details click on www.ncpublicschools.org/fbs/resources/newsletters/.

- Closing Procedures for Fiscal Year 2008-2009:
In order to comply with the closing deadline for 2008-09, as directed by the Office of State Budget and Management, please initiate the procedures as set out in the attached letter directed to LEA Superintendents and LEA Finance Officers. Should you have questions, please contact Paul LeSieur at plesieur@dpi.state.nc.us or by phone 919.807.3701.
- House Version of SB 202 - Sixth Edition, Budget Cuts by LEA:
Attached is an excel spreadsheet to provide you with an understanding of the affect of the House version of SB 202 approved June 13. Please note that these reductions are not final and the allotments are subject to change once the Senate and House Conference Committees agree on the education funding reductions and the final bill is passed by the General Assembly. Non-Recurring cuts are reflected in this document to Classroom Materials and Supplies \$46,448,981 and Noninstructional Support \$356,970,583. The nonrecurring cuts to these two categories will be replaced with the Federal, State Fiscal Stabilization Funds.
If you have any question on these calculations please feel free to contact Lydia Prude at lprude@dpi.state.nc.us 919.807.3739 or Paul LeSieur at plesieur@dpi.state.nc.us 919.807.3701.
- Matching Retirement Rate - use 8.14% to accrue AND pay installments:
As stated in the June 3rd newsletter, SB 287 increases the Matching Retirement Rate to 8.54%, effective July 1, 2009. LEAs should use the 8.54% rate for all new FY 10 payrolls BUT since it is very unlikely that a final State budget will be passed by June 30, DPI is recommending that the LEAs use the current rate of

8.14% as the matching retirement rate for the Installment accruals. This will have the least amount of impact on your FY 09 expenditures and 13th period reporting. Make final FY 09 expenditures accordingly. Even though SB 287 increases the rate to 8.54% July 1 (and the final budget may establish yet another rate), LEAs will still run the July (and in some cases August) installment payrolls at the accrued 8.14% rate so that the actual installment expense will closely match the installment accruals. Once the budget is passed, AP invoices will be manually accrued to adjust the July and/or August matching checks to the passed percentage. Any difference in the rate would be reflected in FY 10 expenditures. DPI will keep you posted, and notify you of the legal FY 10 rate once the budget is passed. If you have questions contact Ally Barfield at 919.807.3715 or abarfiel@dpi.state.nc.us.

- **INSTALLMENT ACCRUAL REMINDER:**

In order to ensure that we receive all of the installment accruals with the June datafile transmission, and to prevent us from unnecessarily contacting those of you who will have no accruals, we are requesting your help. If you do not pay your employees on traditional installments, and therefore will not have installment accruals, please email Alice Lambright at alambrig@dpi.state.nc.us by Friday, June 26, 2009. Simply put "No accruals - LEA (plus your three digit LEA number)" in the subject line. We appreciate your help.

6. POLICY SERVICES: NORTH CAROLINA SCHOOL BOARD ASSOCIATION – JUNE 2009:

One of the most important duties of a school board is to adopt policies that provide direction and guidance for the school system. To be effective, school board policies must be educationally and legally sound. As our federal and state legislative and judiciary bodies continue to adopt and revise statutes and issue legal decisions affecting school districts, it is imperative that school boards keep their policies updated.

NCSBA has staff, services and tools to help local boards fulfill their policy-making responsibilities. [Click here to download a copy of their policy brochure.](#)

Membership Policy Services

The association's [legal/policy staff](#) is available free of charge to:

- Answer policy-related questions by phone
- Provide individual sample policies and
- Assist in reviewing or revising individual school board policies.

[Policies to Lead the Schools](#)

Policies to Lead the Schools (PLS) is a policy reference manual developed by NCSBA. It provides to local boards of education a resource of up-to-date, legally compliant sample policies. NCSBA also provides an update service to PLS that reflects changes to the policies based upon changes in school law.

[Web Hosting Service: Putting Local Board Policies on the Internet](#)

NCSBA will put your local board policy manual on the Internet using Folio® Infobase, a powerful electronic publishing tool. Our Web Hosting Service allows extensive searching, links to legal references, fast updates and quick, easy access to the most up-to-date version of the policies.

[Policy Manual Customization](#)

NCSBA offers custom policy services to local boards. Our staff will analyze your current board manual and determine which policies need to be modified, added or deleted to meet state and federal requirements.

7. STATE HEALTH PLAN HBR UPDATE:

Please access the following link to review the current update:

www.shpnc.org/images/HBR_Update/HBRNews_Jun09.html

8. WHAT'S NEW ON THE WEB – JUNE 12, 2009 - NCDPI WEB HIGHLIGHTS:

For updates access online at www.ncpublicschools.org/whatsnew/.

9. NEWSROOM:

The Communications and Information Division provides the online newsroom, www.ncpublicschools.org/newsroom/, as a central resource of news and current information about K-12 education events, report releases and other initiatives in North Carolina public schools on the following:

- NC Writing Instruction System Pilot Recognized as National Best Practice
- Learn and Earn Online Course Registration More than Triples in Two Years
Students Earn Free College Credit through E-Learning
- North Carolina Joins State-Led Effort to Develop K-12 Education Standards

ARTICLES OF INTEREST

THE PUBLIC SCHOOL FORUM OF NC – June 19, 2009:

A not for profit policy think tank which is a partnership of business leaders, education leaders, and government leaders in North Carolina. Since opening its doors in 1986, the Forum has evolved into an organization that has made a significant contribution to schools across North Carolina. Articles reflect current issues about the school system. For details: www.ncforum.org/

PUBLIC EDUCATION NETWORK WEEKLY NEWSBLAST – MAY 15, 2009:

For details on articles, click: www.publiceducation.org/newsblast_current.asp.

GRANT AND FUNDING INFORMATION

[Robert Wood Johnson Foundation: Active Living Research and Healthy Eating Research Grants](#)

Active Living Research and Healthy Eating Research are national programs that support research to identify promising policy and environmental strategies for increasing physical activity, promoting healthy eating, and preventing obesity. This call for proposals supports time-sensitive, opportunistic studies to evaluate changes in policies or environments with the potential to reach children who are at highest risk for obesity, including African-American, Latino, Native American, Asian-American, and Pacific Islander children (ages 3 to 18) who live in low-income communities or communities with limited access to affordable healthy foods and/or safe opportunities for physical activity. Research studies may focus on one or both sides of the energy balance equation -- on physical activity (including sedentary behavior), healthy eating, or both. Maximum award: \$150,000. Eligibility: 501(c)3 organizations in the United States whose program, event, or policy change to be studied justify the rapid-review process in order to answer the proposed research questions. Deadline: July 17, 2009, for letter of intent.

www.rwjf.org/applications/solicited/cfp.jsp?ID=20681

[LEGO: Grants for Early Childhood Education and Development](#)

The LEGO Children's Fund will provide grants for collaborative programs, either in part or in total, to organizations that focus on early childhood education and development; technology and communication projects that advance learning opportunities; or sport or athletic programs that concentrate on underserved youth. Maximum award: \$5,000. Eligibility: 501(c)3 organizations. Deadline: August 1, 2009.

www.legochildrensfund.org/Guidelines.html

[NEA: Learning & Leadership Grants](#)

NEA Foundation Learning & Leadership Grants are given to public school teachers, public education support professionals, and/or faculty and staff in public institutions of higher education for one of two purposes: Grants to individuals fund participation in high-quality professional development experiences, such as summer institutes or action research; Grants to groups fund collegial study, including study groups, action research, lesson study, or mentoring experiences for faculty or staff new to an assignment. Maximum award: \$5,000 for groups, \$2,000 for individuals. Eligibility: public school teachers grades K-12; public school education support professionals; or faculty and staff at public higher education institutions. Deadline: October 15, 2009.

www.neafoundation.org/programs/Learning&Leadership_Guidelines.htm

[American Management Association and Leader to Leader Institute: Year-long Scholarship](#)

The American Management Association (AMA) and Leader to Leader Institute scholarship program assists social-sector nonprofit organizations in developing strong leadership. The scholarship is designed to give nonprofit leaders an opportunity to step out of the day-to-day, interact with peers across sectors, and develop practical skills to apply immediately within their organizations. Maximum award: one-year scholarship. Eligibility: employees of 501(c)3 organizations with a minimum of three years of work experience in the social sector. Deadline: December 15, 2009.

<http://leadertoleader.org/collaboration/ama/index.html>

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Human Resources Administrators Newsletter - July 2, 2009

Colleagues,

The following information was sent to the Finance Officers and we thought this information was worth sharing with the hope of providing assistance and guidance in making decisions as you continue to meet challenges.

(1) Continuing Budget Resolution Passed, Extends Government Operations thru July 15, 2009. Session Law 2009-215 (S311):

The General Assembly passed the continuing resolution Tuesday afternoon.

- It allows state government to continue operations at an 85% funding level, knowing there are imminent cuts coming to the budget.
- Does not allow vacancies or positions with expected cuts to be filled.
- The retirement rate payments until a budget is passed must be paid at the 8.14% amount until the budget is passed.
- Employee salary schedules for FY 2008-09 remain in effect, no pay increases.

Web link to the bill: www.ncleg.net/Sessions/2009/Bills/Senate/PDF/S311v6.pdf.

(2) Budget Freeze is Lifted Effective July 1, 2009:

Though new year expenditures are allowed, please beware that the cash flow is still an issue.

At this time, the House budget reflects an 11% reduction in funding to the K-12 budget. Expenditures you incur maybe subject to elimination after the final budget is passed and will require being transferred to another appropriate funding source.

There has been no discussion of changing Longevity payments by either the Senate or House to date.

(3) Reduction in Force (RIF) and Health Insurance Guidance:

Attached are the following documents on:

- 2009 RIF Policy Guidance - Defines what is and what is not a reduction in force situation. Links included to NC School Boards Association sample RIF policies.
- Reduction in Force and Health Insurance - Provides options for RIF employees.
- 2009 Q&A Implications for RIF Actions - Provides frequently asked questions on RIF and Health Insurance options.

If you have questions or concerns, please contact Joan Crump at jcrump@dpi.state.nc.us or 919.807.3366.

(4) Guidance on Retirees and the October 1, 2009 Sunset of Working the Exempt from the CAP:

Attached are the following documents on:

- Retirement and Re-employment Changes 2009 - Outlines changes required of retirees hired exempt from the cap.
- 2009 Chart on Exempt from the Cap due to Sunset - Outlines options for retired teachers hired exempt from the cap.
- 2009 HB94 Retirees Volunteering - New retirees may volunteer in schools as unpaid "bona fide" volunteers during the six months waiting period.

If you have questions or concerns, please contact Joan Crump at

jcrump@dpi.state.nc.us or 919.807.3366.

(5) Reporting Matching Expenditures for Abstinence Grant (PRC 057):

The requirements of the Abstinence Until Marriage (AUM) grant (PRC 057) include a requirement for matching expenditures at the LEA level of 3 non-federal dollars for every 4 federal dollars. Matching expenditures are to be reported quarterly, and the final match report for 2008-09 should be submitted by July 15, 2009.

Additional information, including reporting forms and information regarding the types of matching expenditures to be reported, can be found on the DPI website at www.ncpublicschools.org/fbs/finance/federal/. The DPI program administrator for the AUM grant is Nakisha Floyd (nfloyd@dpi.state.nc.us). Please contact Stephanie English in the Monitoring & Compliance (senglish@dpi.state.nc.us or 919.807.3686) with questions related to the reporting of matching expenditures.

(6) Transportation Funding Information:

DPI Transportation has posted some important links dealing with transportation efficiency and transportation funding for 2009-2010, including a 45 minute webcast. Refer to www.ncbussafety.org/FundingTIMSLinks2009.html.

Contact Derek Graham at 919.807.3571 if you have questions.

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Changes to Reemployment Provisions

I. Current Guidelines to Reemploy Retirees

The Department of Public Instruction in collaboration with the Department of State Treasurer (Retirement Systems Division) recently completed a review and analysis of the changes for reemploying retirees.

The exception for Teachers' and State Employees' Retirement System (TSERS) retirees who wish to return to work as classroom teachers exempt from the earnings limitations expires October 1, 2009. The North Carolina General Assembly did not extend these provisions before officially adjourning on August 11, 2009, and the General Assembly is not scheduled to reconvene until May 12, 2010.

As a result of the expiration of these provisions, please remember that **any individual** retired from the TSERS who is reemployed with a public school on or after October 1, 2009 who wishes to continue to receive his/her monthly retirement benefit while reemployed will be subject to the provisions outlined for all TSERS retirees who return to work for any agency covered by TSERS in the "Return-to-Work Laws at a Glance" article located on the Retirement Systems Division's Web site at: www.nctreasurer.com/NR/rdonlyres/0C706A30-0FB5-4FEB-8CFE-4821DD44D216/0/ReturntoWorkLawsataGlance.pdf .

Please note that reemployed retired teachers, except those in full-time positions who must become contributing members, will now be subject to an earnings cap. A retiree may request his/her earnable allowance limit by contacting the Retirement System at 1-877-733-4191 (outside Raleigh) or 733-4191 (local to Raleigh) or by logging on to his or her secure ORBIT account at <https://orbit.myncretirement.com/orbit/Common/Pages/BPASLogin.aspx> .

Earnings prior to October 1, 2009 that was exempt from the cap while working under the classroom teacher exemption will not count against the retiree's 2009 earnable allowance limit. Also, if the retiree is reemployed in a position that requires him/her to become a contributing member of the TSERS, the Retirement Systems Division (RSD) should be contacted immediately so that the RSD can suspend the member's retirement benefit, and prevent the member from having an overpayment. Please note that, by law [NC General Statutes § 143-64.80(b)], the Retirement System cannot forgive an overpayment. For further details please link to: [TSERS' Retirement Monitor for September 1, 2009](#)

Please keep in mind when re-hiring retirees, the circumstances doesn't change the definition and requirement of the employment status. To avoid violation of the definition of employee as outlined in NC Statutes § 135-1(10), a retiree may be reemployed part-time or full-time in the following ways:

Part-time

1. Permanent status
 - less than 30 hrs a week
 - 20 – 29.9 hrs per week (prorata benefits)
 - less than 20 hrs (no benefits)
 - eligibility for benefits must be determined at the time of the initial assignment when the assignment status changes
2. Interim status
 - not more than six consecutive pay periods (after 6 months, the reemployed retiree should not still be working in the same position, same class nor with the same students)
 - individual must be filling in for an incumbent who is expected to return
 - no benefits

- two individuals may share the assignment with the same LEA to satisfy and meet requirements of the assignment in six months increments

3. Temporary status

- not more than six consecutive pay periods (after 6 months, the reemployed retiree should not still be working in the same position, same class nor with the same students)
- no benefits
- two individuals may share the assignments with the same LEA to satisfy and meet requirements of the assignment in six months increments.

4. Substitute

- filling in for an individual on paid leave
- no benefits

5. Fee for Service

- no benefits
- a classroom teacher can't be hired under a "Fee for Service" contract

Full Time

1. Interim status – not more than six consecutive pay periods

- individual must be filling in for an incumbent who is expected to return (after 6 months, the reemployed retiree should not still be working in the same position, same class nor with the same students)
- no benefits
- two individuals may share the assignments with the same LEA to satisfy and meet requirements of the assignment in six months increments

2. Temporary status

- not more than six consecutive pay periods (after 6 months, the reemployed retiree should not still be working in the same position, same class nor with the same students)
- no benefits
- two individuals may share the assignments with the same LEA to satisfy and meet requirements of the assignment in six months increments

3. Substitute

- filling in for an individual on paid leave
- no benefits

4. Fee for Service

- no benefits
- a classroom teacher can't be hired under a "Fee for Service" contract

NOTE: As stated in Statue G.S. 143-64.80(b), under no circumstance will a State Agency or a LEA of the Public School System be forgiven for an overpayment of State funds.

Beginning October 1, 2009, the Retirement System will be very watchful of all activities involving all retirees who were employed "exempt from the cap" and transitioned over to "subject to the cap". The Retirement System is technically prepared to run reports to identify this population of individuals through ORBIT. The Retirement System will be conducting audits to make sure the LEAs are conducting business according to what is required. Please carefully review the attached information and contact the Retirement System when in doubt regarding a specific "return to work" situation.

All LEAs need to be mindful in what employment status is being used to re-employ retirees. The employment status requirement must be complied. The circumstances will not change the definition or the requirement of the various employment statuses. We strongly recommend that LEA become familiar with the employment statuses and refer to the above information when re-employing retirees.

The following are areas of concern:

1. The primary focus of all of the employment statuses is to meet the requirement of the employment status, the earning cap and the beginning date of employment.
2. If there is a change in the employment status during the school year, this will raise awareness for the Retirement System.

Example: If John Doe is hired at the beginning of the school year in an interim status and John Doe's employment status changes to part-time permanent status in the same school year, this will raise awareness and will be questionable by the Retirement System.

3. Try to start the individual out in the same status they will end up in at the end of the school year. If it is necessary to make a change in employment status during the same school year, thoroughly document the reason for the change.
4. When re-employing retirees, have a contract to reflect how the retiree is being rehired such as the employment status, responsibilities, hours, duration of the contract and have retirees to sign the contract. If there is an audit by the Retirement System, contracts may be asked to be reviewed.
5. In those cases where a retiree is rehired in a part-time permanent status, working up to 29.9 hours per week, the LEA needs to make sure that this individual is not working more than the number of hours reflected in the contract. This is an example of where the written contract plays a crucial part. If the retiree is found to be working more than 29.9 hours, the Retirement System can suspend the member's retirement benefit and require a payback.

II. ORBIT Reporting Change for Reemployed Retired Teachers Effective October 1, 2009

Compensation paid to a rehired retiree teacher for services performed on and after October 1, 2009 should no longer be reported in your monthly ORBIT payroll report as STRE, but should be reported under STRS (subject to earnings restrictions) or STG (if the member meets eligibility as a contributing employee), and you will no longer remit an employer contribution of 11.7% on any compensation paid for services performed on or after October 1, 2009. (Attachment)

III. New ORBIT Reporting Requirement for all Rehired Retirees Effective July 1, 2009

Under the provisions of House Bill 642, which was recently enacted by the General Assembly, effective July 1, 2009, employers must report all rehired retirees to the Retirement System each month. These rehired retirees should be reported in ORBIT with the appropriate pay period, pay type, plan code, salary and all other applicable fields as defined by the ORBIT file format, www.nctreasurer.com/NR/rdonlyres/613E0FAA-C8F4-4273-8526-E18A5D637793/0/NCEmployerReport.pdf, via the monthly ORBIT payroll report. If the report is not received by the Retirement System within 90 days of the end of each month in which a beneficiary is reemployed, the Retirement System is required to assess a penalty of 10% of the compensation of the unreported reemployed retirees during the months the employer did not report the reemployed retirees, with a minimum penalty of \$25.00. These provisions apply to all TSERS employers.

Retirement Systems Contact Information

- Employers with questions or in need of information should contact the NC Retirement Systems Division's Employer Education and Services Unit at EESU@nctreasurer.com or call toll-free at 1-877807-3131 Option 2 (for outside Raleigh area) and 807-3131 Option 2 (Raleigh area only).

If you have questions regarding a specific return to work situation, please put your questions in writing with all relevant information and mail them to:

Department of State Treasurer
Retirement Systems Division
Member Services – Return To Work
325 N Salisbury Street
Raleigh, NC 27603-1385

Or, you can send an e-mail to the Retirement System at ncretirement@nctreasurer.com with the subject line marked as "Return To Work." (Attachment)

To: LEA Superintendents, Finance Officers, and HR Directors/Personnel Administrators

From: NCDPI Chief Academic Officer Rebecca Garland
NCDPI Chief Financial Officer Philip Price

Please see the following HR-related updates.

*** HR Support**

Quality public schools depend on having quality teachers, principals and other staff members. For that reason, Human Resource Issues are very important to local schools and districts, and we understand that it is important for you to have a strong support network in this area at the NC Department of Public Instruction.

On behalf of NCDPI, this memo is to update you on the new organizational structure for the School Personnel Support Section and to assure you that we will continue to offer support to you in the HR area. Formerly a part of the Department's Financial and Business Services area, the School Personnel Support function has been moved to the Department's Human Resources division. This move was necessary for NCDPI to meet its staff reductions required by the 2009 General Assembly session. NCDPI was directed to reduce its state-funded positions by 13.5 percent.

The two staff members in the School Personnel Support section, Ms. Sonya James and Ms. Joan Crump, are now in the Department's Human Resources division. Their contact information remains the same as before:

Sonya James - 919.807.3365 or sjames@dpi.state.nc.us

Joan Crump - 919.807.3366 or jcrump@dpi.state.nc.us

Their offices will be located in the Human Resources division on the second floor of the Education Building, 301 N. Wilmington St. Raleigh.

Questions and issues that previously were directed to Larry Simmons or Joe Parry-Hill should be addressed to Jack Stone, HR Director, 919.807.3395 or 807.3396 or jstone@dpi.state.nc.us.

The Department's Human Resources division is staffed with seasoned HR professionals with a great deal of experience in state or local government. In addition to Mr. Stone, three others in this area each have over 20 years in state or local government. While there will be a learning curve to issues specific to the local school districts, the HR staff as a whole is committed to providing responsive service and timely communication to you. Over the coming months, they will be meeting with many of you to learn more about your needs as they relate to LEA Personnel Administration.

The other HR staff members are

- Elena Viso, Classification/Compensation Analyst - 919.807.3390 or eviso@dpi.state.nc.us
- Rick Roberson, Employee Relations/Performance Management - 919.807.3798 or rroberson@dpi.state.nc.us

- Gail Walton, Benefits Specialist - 919.807.3392 or gwalton@dpi.state.nc.us
- Ayesha Elam, HR Supervisor, Recruiting and Staffing - 919.807.3387 or aelam@dpi.state.nc.us
- Sean Gutowski, Recruiting Specialist - 919.807.4190 or sgutowski@dpi.state.nc.us
- Althea Trantham, HR Representative - 919.807.3393 or atrantham@dpi.state.nc.us

*** New Director of Educator Recruitment and Development**

We are also pleased to announce that Dr. Lynne Johnson has joined the staff at the Department of Public Instruction as the Director of Educator Recruitment and Development (ERD). This division was formerly known as Talent Management and Development and was under the leadership of Dr. Jesse Dingle. Dr. Johnson was most recently a staff member at PEP. She has also been a principal in Wake County Schools and a member of Senior Leadership in Guilford County. Dr. Johnson will be revamping the ERD Division and filling the vacant position formerly held by Danny Holloman who left DPI to become the HR Director in Person County. Any questions that you may have regarding Title II, beginning teacher support, mentoring, etc. should be directed to Dr. Johnson. Her email address is ljohnson@dpi.state.nc.us.

*** Praxis 511 Update**

HR directors should have received a copy of the memorandum regarding Praxis 511 that went out from Dr. Atkinson to Superintendents last Thursday. The Department has been working with the US Department of Education to try to ameliorate this situation, but we did not prevail. Superintendents had been apprised of this situation as it unfolded over the summer and into fall. NCDPI staff consider this situation very sensitive since all teachers who have been regarded as highly qualified under 511 are not teaching in assignments that require them to be labeled as "not highly qualified." We appreciate your careful handling of this matter and soon hope to have specific suggestions for how to handle Praxis 511 in the future. NCDPI staff will be providing further guidance regarding action plans for any teachers who will remain "not highly qualified" due to Praxis 511 after principals have had an opportunity to reorganize services for students with disabilities for the spring semester.

*** Teacher Turnover Report Update**

HR Directors also have asked if NCDPI will modify the Teacher Turnover Report to allow proper notation of teacher turnover due to budget cuts and reduction in force. NCDPI staff will be adding a column to the report that will allow for those indications.

SS200 and SS300 Reports

Colleagues,

Please review and insure that your LEA submits the following.

(1) LEA Full-time Personnel Data:

LEA Full-time Personnel Data (SS200) is due November 25th. The form is online at www.ncpublicschools.org/fbs/. If you have any questions, contact Angela Harrison at 919.807.3734 or aharrison@dpi.state.nc.us.

(2) Salary Supplements Data:

Local Salary Supplements Data (SS300) is due November 25th. The form is online at www.ncpublicschools.org/fbs/. If you have any questions, contact Ozella Wiggins at 919.807.3757 or owiggins@dpi.state.nc.us.

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State Health Plan HBR Alert - Comprehensive Wellness

Colleagues,

The following information was previously sent on September 19th. In addition to re-sending the information, I am also sending the Tool and Resource information so you can have a complete package on the Comprehensive Wellness Initiatives (CWI).

This year, the North Carolina General Assembly enacted legislation requiring the State Health Plan to develop a Comprehensive Wellness Initiative (CWI). The State Health Plan has developed a wellness initiative to engage members in managing their health more effectively, while saving money for themselves, the Plan and taxpayers. The programs focus on quitting tobacco use and weight management. The tobacco cessation program will begin on July 1, 2010. The weight management program will begin on July 1, 2011.

It is important to note that as long as members **are actively trying** to quit tobacco use or to lose weight, they will be allowed to maintain their current level of benefits. In addition, members who have a documented health condition that prevents them from maintaining a healthy weight will be allowed to enroll in the 80/20 Standard plan.

The State Health Plan has provided a variety of supports to assist members in improving their health in these key areas. Be sure to review the Benefit Mailing www.shpnc.org/news-20090914.html from the State Health Plan, which all members will receive by October 1, 2009 and some members may receive as early as the end of this week. All of the attached materials will be posted on State Health Plan Web site, www.shpnc.org no later than Friday. You may find the *Frequently Asked Questions* section especially helpful.

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Human Resources Administrators Newsletter – December 12

Colleagues,

The following items were brought to our attention and we thought was worth sharing:

1. The concern of whether or not Workers Compensation should run concurrent with FMLA. After researching the FMLA regulations and The School of Government interpretation, both indicates that the two may, can or could run concurrent based on certain findings and medical documentation. To provide clarity on when the two can run concurrent, I am providing the following:

Q: Does workers' compensation leave count against an employee's FMLA leave entitlement?

A: It can. FMLA leave and workers' compensation leave can run together, provided the reason for the absence qualifies as both a serious illness (FMLA) or an on the job injury (WC) and the employer properly notifies the employee in writing that the leave will be counted as FMLA leave.

Under FMLA's broad definition of serious health condition, a variety of situations could arise involving overlap with ADA and workers' comp. However, FMLA does not apply to minor injuries that do not incapacitate for more than three days or do not require continuing treatment. When making an assessment, always refer to the Employment Benefit Policy Manual under FMLA 8.2 Definitions., of Serious Health Condition.

NOTE: The Benefit and Employment Policy Manual will be updated to reflect this change.

2. Unannounced Visits: The United States Citizen and Immigration Service (USCIS) could possibly show up at your LEAs unannounced. The USCIS, or the United States Citizen and Immigration Service, is a department within the [Department of Homeland Security](#) (DHS). The USCIS was created by the Homeland Security Act of 2002, and was formerly the benefit and service functions of the U.S. [Immigration and Naturalization Service](#) (INS).

One of the LEAs encountered an unannounced visit by a contractor from USCIS. The visit was referred to as an administrative state visit to audit files. If you're visited by the USCIS, please feel free to ask for some form of ID. You can also call 1.800.375.5283 to verify further information.

Please continue to bring to our attention and inform us of ways to better perfect the service that we provide. Thank you for all you do.

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