

Who

We

Are

Office of Financial
and Business Services

Public Schools of NC
NC Department of Public Instruction
State Board of Education

September 2010

Overview of the Office of Financial and Business Services

- The **Chief Financial Officer for Financial and Business Services** provides day-to-day oversight management for the Division of School Business, Division of Financial Services, Division of School Support, Office of Charter Schools, Licensure Section, and the Systems Accounting Section. This office manages nearly \$10.5 billion in state and federal funds and provides various technical support services to local education agencies (LEAs), their schools, their employees, and the Department of Public Instruction.
- The **Division of Financial Services** is responsible for the general accounting functions of the Department. This includes recording and reporting of all financial transactions for the Department which include the receipt, disbursement, and transfer of funds, child nutrition claim reimbursements, and LEA cash processing (daily cash transfer to LEA bank accounts). The Division is also responsible for the procurement of goods and services and supporting miscellaneous internal control and reporting functions for the department such as fixed asset accounting and preparation of the Comprehensive Annual Financial Report. The Budget Management Section of the Division is responsible for establishing and managing the \$10.5 billion state, federal, and receipt supported budget of DPI and the State Public School Fund (SPSF). This involves ensuring proper alignment of resources to meet the Agency's and SBE goals, as well as, compliance with state and federal budget regulations.
- The **Division of School Support** is responsible for providing auxiliary services for the 115 LEAs in the areas of Child Nutrition, Insurance, Plant Operation, School Planning, Transportation, and Textbooks. LEAs are assisted with proper use of federal dollars related to the school food services, in the Child Nutrition program. The Insurance Section provides property insurance coverage for 95 LEAs and 28 community college administrative units; manages the third party contract for the Worker's Compensation, and provides assistance and expertise to LEAs on Unemployment Insurance. The Plant Operation Section provides engineering support for the LEAs. The School Planning Section advises the LEAs on school planning and construction. The Transportation Section responsibilities include funding allocations, school bus inspections, and replacement as well as the management of two statewide information systems; all related to the transportation of students to and from school. In addition, the Transportation Section oversees third party contracts for collection and sale of DWI seized vehicles. The Textbook Section purchases and distributes between 60 to 95 million dollars of textbooks for all LEAs. The Division Director services as the department's representative of the Governor's Utility Savings Initiative, Emergency Management, H1N1, and Food Safety and Security Task Force; along with building support management for the agency.
- The **Office of Charter Schools** provides leadership in policy development at the State and school level in compliance with North Carolina Charter Schools Act (NCGS 115C.238.29). The Office of Charter Schools provides technical assistance to groups interested in starting a public charter school. The Office of Charter

Schools provides leadership in development, management and distribution of Federal Charter School Grants, technical assistance to charter schools requesting renewal, leadership, training, skills, and knowledge to the boards and administrators to ensure high quality education for all students. Assists boards and administrators in compliance with laws and regulations found in the State Statutes and State Board of Education Policy. The Office of Charter Schools provides opportunities for growth of skills of teachers, educators, and interested citizens to share knowledge and interact with colleagues through a high quality charter school conference.

- The **Division of School Business** is responsible for the interpretation, dissemination, and compliance of all fiscal, personnel, student accounting issues, and allotments to the LEAs and charter schools as it pertains to the \$10.5 billion of state and federal funds administered by the Department. This division must ensure the correct interpretation and implementation of the general statutes, federal legislation, and State Board of Education policy as they pertain to fiscal, student accounting, personnel policies, and allotment policies applied by the LEAs and charter schools. This division obtains and ensures compliance with the necessary student related data, which provides the basis of our funding (Average Daily Membership-ADM). This student data also provides details on teacher assignments, class sizes, demographics, etc. The compliance aspects of this division continue to increase due to Leandro, Medicaid funding collaborative efforts with DHHS, and increased federal and state compliance requirements. This division provides 90% of all fiscal, student, and personnel related analysis as required by the General Assembly and Office of State Budget and Management, as well as others. This division is responsible for all financial, personnel, salary, and allotment policies for the LEAs and charter schools.
- The **Systems Accounting Section** is responsible for supporting all areas of Financial and Business Services to ensure accurate and timely data management. This requires the planning, development, implementation, and maintenance of both automated and manual processes. They also align internal and external procedures to comply with all applicable statutes and policies, ensuring they are in line with the State Board of Education's missions and priorities.
- The **Licensure Section** is responsible for evaluating teaching credentials and issuing new and renewal licenses that qualify individuals to seek and to be employed in North Carolina public, non-public schools, as well as in federal, charter, and some private schools. The Licensure Section serves all existing and potential public school teachers, administrators and other special service personnel within the state of North Carolina, as well as existing and potential teachers throughout North America and the Globe who are interested in teaching in North Carolina.

North Carolina statues specify that all professional employees of public schools hold the appropriate license for the subject or grade level taught or for the professional assignments. The North Carolina Constitution delegates responsibility for setting those standards to the State Board of Education (SBE), whose regulations for licensure are in turn administered by the Licensure Section.

Chief Financial Officer

Staffing Overview

The total number of personnel in the Chief Financial Officer's office is 4.

Area Goals

- Effective and efficient accounting, budgeting, and business processes
 - Strong internal accounting controls to mitigate risks
 - Exceptional customer and employee service
 - Clear and current policies and procedures which are adequate in scope
-

Area

Management – Philip Price, Chief Financial Officer 807-3600

Responsibilities

- Provides day-to-day oversight management for the Division of School Business, Division of Financial Services, Division of School Support, Office of Charter Schools, Licensure Section, and the Systems Accounting Section. This office manages nearly \$10.5 billion in state and federal funds and provides various technical support services to local education agencies (LEAs), their schools, their employees, and the Department of Public Instruction.

Executive Assistant – Teresa Matthews 807-3600

- Assist Chief Financial Officer with day-to-day operations,
- Maintains scheduling of Chief's calendar,
- Attends monthly TCS SBE meetings; responsible for gathering and distributing materials, and taking minutes at the TCS Committee meetings,
- Provides assistance to Financial and Business Services staff in BEACON as a Time Approver and Time Administrator on an as needed basis,
- Provides customer service to callers and visitors, and
- Provides administrative assistance to the entire Area of Financial and Business Services as needed.

Accounting Technician – Debby Jackson 807-3603

- Assist Chief Financial Officer with review and approval of contracts for the agency,
- Maintains database for Finance Officers' certification,
- Communicates financial information to Finance Officers' thru a weekly newsletter,
- Reviews and processes for approval, meetings, workshops, and conferences for the agency,
- Provides assistance to Finance Officers' upon request.

Special Assistant/Research Analyst – Vacant 807-3754

- Makes annual, five year, and 10 year student population projections for budgeting, allotments, and school planning,
- Maintains the Education Statistics Access system,
- Prepares and provides fiscal and non-fiscal data required by the US Department of Education,
- Conducts educational and fiscal research as required,
- Maintains EVASS system data security and support,
- Provides statistical/technical support to others, and
- Writes programs on the mainframe to PC to respond to data requests.

Division of Financial Services

Staffing Overview

The total number of personnel in the Division of Financial Services is 34.

Division Goals

- Effective and efficient accounting, budgeting, and business processes
 - Strong internal accounting controls to mitigate risks
 - Exceptional customer and employee service
 - Clear and current policies and procedures which are adequate in scope
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Division Responsibilities

Management – **Becky McConkey, Director 807-3741**
Sarah Harris, Assistant Director 807-3636

Responsibilities by Section

- Provides leadership, policy development, and direction for the work of the division.

Accounting Controls and Reporting – **Peta-Gaye Shaw, Section Chief 807-3621**

- Prepares and certifies monthly accounting reports and annual (CAFR) financial statements,
- Analyzes, reconciles, and supports general ledger records,
- Safeguards fixed assets
- Collects agency receivables, and
- Assesses agency internal controls

Cash Management and Collections – **Vacant, Section Chief 807-3611**

- Deposits and records agency cash collections,
- Requisitions (transfers) state appropriation to DPI and LEA disbursing accounts,
- Analyzes and draws federal funds for DPI and LEA disbursing accounts and prepares related reports and reconciliations,
- Forecasts and projects cash requirements and cash reversions,
- Prepares monthly reconciliation of cash transactions between accounting systems and banking systems, and
- Processes and distributes checks.

Accounts Payables and Child Nutrition Claims – **Regetta Darden, Section Chief 807-3652**

- Processes payments for invoices, contracts, and travel claims,

- Processes and reports on Child Nutrition reimbursements to school systems, and
- Responsible for 1099, sales tax and withholding tax determination and reporting.

Budget Management - Rose Page, Section Chief 807-3743

- Plans and develops all budgets,
- Aligns, establishes, and manages all budgets,
- Monitors, analyzes, and reviews budgetary activity,
- Projects state and federal fund reversions, and
- Provides budgetary guidance and direction.

Purchasing and Contracts – Chuck Clements, Section Chief 807-3661

- Administers purchasing and contracting,
 - Supervises bidding (quotes, RFPs) and vendor selection, and
 - Provides central receiving of goods.
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**Current
Initiatives**

Major current initiatives include:

- Supporting annual audit of agency by State auditors,
- Reviewing core processing (e.g., purchasing) procedures,
- Revising method for establishing and recording budgets and expenditures, and
- Assessing agency internal controls.

Division of School Support

Staffing Overview

The total number of personnel in the Division of School Support is 78.

Division Goals

- Assist clients to achieve educational goals, safe environments, and economy of operation
 - Meet statutory requirements by providing leadership, training, support, and other needed services to those involved in Education
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Division Respon- sibilities by Section

Management – Ben Matthews, Director 807-3501

- Provides leadership/direction for the work of the division
- Represents State Superintendent on Capital Planning Commission
- Serves as Utility Savings Initiative representative for Governor's Utility Initiative
- Serves as Building Maintenance Director
- Serves as Sustainability Officer for Governor's Project Green Initiative
- Serves as H1N1 lead for the State Agency

Child Nutrition – Lynn Harvey, Section Chief 807-3506

- Administers the National School Breakfast and Lunch Programs, After School Snack Program, Seamless Summer Food Service Program, Fresh Fruit and Vegetable Program, the Special Milk Program and the State Administrative Expense Plan for Child Nutrition Programs
- Approves and monitors the Annual Agreement between each School Food Authority (SFA) and the State Board of Education to administer the above-listed programs
- Provides technical assistance and training for all SFAs as required by law and upon request to assist SFAs in achieving individual goals related to the successful operation of the above-listed Child Nutrition Programs
- Manages the Child Nutrition Leadership Academy to promote continuous professional development among Child Nutrition Personnel who administer the above-listed programs locally,
- Analyzes each SFAs operational and financial status and makes recommendations to maximize efficiency and effectiveness
- Utilizes state-of-the art technology systems to effectively, efficiently and accurately manage program operations and the distribution of State and Federal Child Nutrition funds to SFAs
- Conducts federally-mandated School Meals Initiative (SMI) Review to assess compliance with nutrition standards, local wellness policies, and food safety management programs which, when implemented, prevent

the intentional and unintentional contamination of food in the school nutrition environment

- Conducts the Federally-mandated program, operational and financial audit (Coordinated Review Effort) of all SFAs; reports audit results to Federal, State and local Education Authorities

Insurance – Eileen Townsend, Section Chief 807-3522

- Provides insurance coverage and risk management for school and community college property
- Administers Self Insured Workers' Compensation Fund and Claims Administration
- Provides expertise on unemployment issues

Plant Operation – Kim Lawson, Section Chief 807-3548

- Provides engineering services and technical assistance in areas of plant operation and maintenance to local school systems
- Provides technical training workshops for maintenance/custodial personnel
- Provides consultations and designs for modification of heating/air conditioning systems, structural modifications, roof replacements, lighting retrofits, electrical service updates, water supply replacement, and wastewater design
- Provides consulting services in environmental areas such as drinking water, wastewater discharge, underground storage tank, indoor air quality, and mold/mildew remediation

School Planning – Steve Taynton, Section Chief 807-3560

- Assists local boards of education with expert assistance and utilization of educational facilities and support for environmentally sound school construction
- Maintains the prototype school design website
- Reviews plans for new schools, additions and renovations to existing schools
- Evaluates existing and new educational programs to determine type of classroom spaces required
- Maintains data base to provide up-to-date information
- Provides support for the Qualified Zone Academy Bonds (QZAB), Qualified School Construction Bonds (QSCB), the administration of the Public School Building Capital Fund (PSBCF), and Education Lottery distributing for school construction
- Provides support for effective energy use in school buildings
- Publishes planning and design guides for school construction
- Coordinates and administers each LEA's long range plan every five years

Transportation – Derek Graham, Section Chief 807-3571

- Administers state funds allotted for school transportation (includes operations and replacement of school buses)

- Participates in the development and monitoring of rules and regulations including specifications and maintenance of buses
- Oversees systems initiatives for vehicle fleet management and the implementation of the Transportation Information Systems (TIMS) for routing and scheduling school buses
- Determines requirements for replacing equipment, including buses and service vehicles
- Provides advice to LEAs concerning their transportation system
- Provides feedback on the condition of each LEA bus fleet through on-site inspections
- Provides oversight of the DWI vehicle seizure contract
- Provides training in school bus safety inspection

Textbook Services – Drew Fairchild, Section Chief 715-5379

- Processes orders and ships textbooks to LEAs and Charter Schools
- Procures and maintains modified textbooks inventory (large print and Braille) for LEAs
- Assists with shipping requested items to LEAs

Current

- Retrofitting school buses with emissions-? technology

Initiatives

- Representing Department on Governor’s Food Safety and Security Task Force
- Seeking expansion of insurance coverage for community colleges
- Managing initiatives to enhance better nutrition in public schools
- Providing leadership for more secure public schools
- Furnishing Rapid Response Technical Services to LEAs in emergency conditions
- Equipping LEA School Maintenance Personnel with Electrician Exam, Asbestos Abatement, and Wastewater Treatment training seminars
- Supplying LEAs with maintenance centered design services
- Providing expertise relating to more environmentally-sound public schools
- Working with third party administrators to settle workers’ comp claims in excess of \$75,000
- Working with committee to gather data and facts related to the cost with bringing the workers’ compensation process back to DPI
- Working directly with Employment Security Commission and LEAs resolving unemployment issues
- Serving schools through annual inspections of school property and sending in loss control specialists to schools when there is a loss within the first 24 hours of the loss
- Negotiating reinsurance for Public School Insurance Fund
- Putting together a liability program for schools to purchase insurance for students involved in work-based learning curriculum
- Investigating Motor Coach permit process (legislative directive)

- Setting up new financing contracts to make arrangements for LEA to order 1000 new replacement school buses
- Developing certification process for school bus inspectors
- Coordinating school bus driver security teaching
- Pilot program of external camera on school buses
- Managing the PSBCF, and the lottery funds
- Managing Qualified Zone Academy Bonds and Qualified School Construction Bonds
- Updating and managing our website (schoolclearinghouse.org) with more information, more prototypes and more publications that are useful to designers and planners
- Collecting data on school construction, capacities and costs
- Continuing with outreach, training and consultation to school officials, designers and others on issues of school facility design
- Expanding technology services to automate operations and internal controls in the management of the Child Nutrition Program
- Developing a national model for a Direct Certification/Verification Process to automatically qualify eligible students for Free and Reduced price meals, thus maximizing student access to school meals and minimizing administrative error
- Implementing a state-wide Procurement Alliance among LEAs to maximize the purchasing power of all districts combined; the Alliance will streamline the purchase of food, supplies and equipment in the Child Nutrition Program
- Developing an automated Food Recall Alert System to immediately notify SFAs of a mandatory or voluntary food recall; developing procedures to quarantine questionable food from the SFA's food supply
- Developing school-based protocols for providing meals and snacks for students with special nutrition needs (allergies, chronic diseases, disabilities, etc.)
- Developing template documents to standard practices state-wide and to assist SFAs in the preparation of required documents where central office staff in the Child Nutrition Program is limited
- Automating the Federal Review/Audit to enable Reviewers/Auditors to record audit results immediately, at the time of observation or finding
- Developing and testing nutrition standards for middle and high schools to promote an optimal school nutrition environment
- Expanding the Fresh Fruit and Vegetable Program from 25 schools to 35 schools in high risk communities (provides free fresh fruits and vegetable snacks to students in selected elementary schools)
- Developing and managing a website to keep Child Nutrition Administrators informed of Regulations, Policies, Procedures and other tools needed for effective program administration
- Collaborating with other state agencies and universities to develop social marketing resources (targeting students) to encourage students to choose more healthful foods and beverages
- Coordinating with the Childhood Obesity Study Committee to identify and implement strategies for the prevention of childhood obesity

- Meeting with local Boards of Education to discuss the unique challenges and opportunities of their individual Child Nutrition Programs
- Informing Federal, State and local decision-makers about the funding crisis in North Carolina's Child Nutrition Program

Office of Charter Schools

Staffing Overview

The total number of personnel in the Office of Charter Schools is 7.

Division

- Support of 100 NC Public Charter Schools

Goals

- Exceptional customer and employee service
 - Timely and accurate delivery of information to the Charter Schools
 - Clear and current policies and procedures that are adequate in scope
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Division

Management - Jack Moyer, Director 807-3490

Responsibilities

- Provides leadership, policy development, and direction for the work of the division

Janice Ham, Administrative Assistant – 807-3491

- Administrative Duties

Joel Medley, Education Consultant – 807-3492

- Annual NC Charter Schools Conference
- Enrollment Increase/Grade Expansion
- Educational Consulting and Operations of Assigned Schools
- Certificate of Occupancy for schools
- Insurance and Bonding
- Board of Directors Training

Jackie Jenkins, Education Consultant - 807-3493

- Applications for new schools
- Training for new schools Board of Directors in conjunction with schools assigned Education Consultant
- Educational Consulting and Operations of Assigned Schools
- Certificate of Occupancy for schools
- Fingerprint
- Insurance and Bonding
- Administrators Summer Institute

Dottie Heath, Education Consultant III – 807-3263

- School Improvement for low performing and priority schools
- Develop and monitor instruction teams
- Professional development and training programs for instructional teams and school personnel.
- Charter Renewal Educational Consulting and Operations of Assigned Schools
- Certificate of Occupancy for schools
- Insurance and Bonding
- Educational Consulting and Operations of Assigned Schools

**Current
Initiatives**

Major current initiatives include:

- Applications for new schools
- Board training
- Operations and Governance
- Charter School Annual Conference
- Charter Renewal
- School Administrator Mentoring
- School Improvement

Division of School Business

Staffing Overview

The total number of personnel in the Division of School Business is 29.

Division Goals

- Provide reliable financial services, support, and information to fulfill the personalized needs of our clientele while ensuring financial integrity
 - Provide training and professional development opportunities through direct technical assistance to LEA and charter school personnel
 - Provide efficient, accurate, and timely reporting by utilizing data collection systems
 - Align internal and external procedures to comply with all applicable statutes and policies, ensuring they are in line with the SBE missions and priorities
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Division Responsibilities

Management – Paul LeSieur, Director 807-3700
Alexis Schauss, Assistant Director 807-3553

- Responsible for the day-to-day operations of the division and the direct supervision of the Section Chiefs,
- Provides leadership, direction, and resources for the division, and manages and directs staff on the following:
 - Maintains and updates the Financial and Business Services website,
 - Provides analyses and costing proposals on certified and non-certified salaries used for state budget purposes and proposed legislation,
 - Provides analyses and costing on state, federal, and local expenditures,
 - Provides reporting and analyses for the State Board of Education as required by policy and by request,
 - Provides analyses and data for the Comprehensive Support Teams, both to determine the priority school districts and to provide up to date information at the school level for the DPI consultants assigned to the LEAs and schools,
 - Compiles data on students, staff, and finances of the school systems,
 - Provides the 10 year projection of high school graduates,
 - Provides the data required for EDEN and CCD for the Federal Agencies
 - Maintains data bases on school personnel, students, and finances that are outside the operational areas,
 - AFT and NEA data collection on Education Salaries and other statistics,
 - Maintains the current enrollment for the Principal Fellows Program,
 - Disseminates quantitative information about the school systems through publications and electronic means,
 - Publications - Statistical Profile, Highlights of the North Carolina Public School Budget, Facts and Figures
 - Education Statistics Access System (ESAS)

Information Analysis & Reporting – Andrew Cox, Section Chief 807-3708

- Collects all monthly and annual UERS financial data from the LEAs,
- Performs reconciliations and cash closeout for the State Public School Fund and the federal grants,
- Assesses penalties for violation of policies pertaining to over expenditures of state and federal funds,
- Monitors the position allotment usage and ensure overdrafts are refunded in a timely manner,
- Monitors the compliance of all state and federal statutes, policies and guidelines as they pertain to the data received from the LEAs,
- Serves as a liaison between the LEAs system vendors, ISIS and SARTOX, and the Department,
- Manages and maintains the Uniform Chart of Accounts,
- Monitors the accuracy of salaries paid to all certified personnel and assists the LEAs in resolving audit exceptions,
- Manages and maintains the State Salary Manual and the State Salary Schedules,
- Provides interpretation on new legislation as it pertains to salaries, chart of accounts, and student accounting,
- Collects and calculates the Principals Monthly Report, Retentions, Promotion and Graduation, Full Time Personnel, Grade Race Sex, Local Salary Supplements from LEAs and charter schools,
- Responsible for the Graduation Verification Data collection, used as the official State record and in the calculation of the Cohort Graduation Rate.
- Responsible for the annual School Activity Report and consulting with LEAs to resolve compliance problems. Used for multiple reports and analyses, including the Highly Qualified Teachers.
- Provides the average daily membership figures for funding,
- Monitors the compliance of class size maximums and reports to the State Board and General Assembly,
- Reviews and investigate the requests for individual class size waivers,
- Performs audits of the average daily membership and class size at the schools,
- Manages and maintains the School Attendance and Student Accounting Manual,

School Allotments – Lydia Prude--807-3718

- Allots funds to LEAs and charter schools in accordance with formats,
- Assists LEAs and charter schools with understanding funding,
- Revises funding as requested by LEAs and allowed by legislation and board policy,
- Projects funding needs based on average daily membership (ADM) growth and average salary, and prepares continuation budget,
- Prepares adjustments to DPI's budget based on allotment revisions,
- Monitors LEAs' potential federal grant reversions and notifies the LEAs,
- Maintains the allotments on the BUD system,

- Prepares projections and analyses of allotment categories as requested by DPI leadership, OSBM, Fiscal Research, LEAs, etc.,
- Prepares the biennial and the continuation budgets for the State Public School Fund,
- Prepares the 1% Salary Increase sheets to be used in determining the cost of salary increases for school personnel,
- Prepares BD 606s to move funding on the Internal MSAS system when an LEA is using their Financial Flexibility,
- Calculates funding to distribute approximately \$6.0 billion dollars of the State Public School Fund to the 115 LEA's and the approximately 100 charter schools. This distribution is made during the Initial Allotment cycle.
- Calculates funding to distribute federal grant fund to the 115 LEA's,
- Calculates reversion amounts for the federal grants in accordance with federal guidelines,
- Develops funding formulas based on legislation and/or State Board approval,
- Prepares allotment revisions to allocate funds that were not distributed in the Initial Allotment,
- Prepares revisions for the School Building Bonds,
- performs special analysis at the request of the Legislature, State Board, LEAs, and other state and outside agencies,
- Updates the Allotment Policy Manual on a yearly basis, and
- Participates in financial conferences for LEAs and charter schools.

Monitoring & Compliance — Stephanie English—807-3686

- Calculates and negotiates LEAs' indirect cost rates,
- Prepares federal reports as required,
- Participates with program staff in training and updating LEA personnel as to the fiscal side of the federal grants,
- Participates in establishing procedures the Agency will implement for new grants to insure fiscal integrity,
- Monitors LEAs potential federal grant reversions and notifies the directors, associates, etc.,
- Reviews the schools' financial audits and follows up on material and/or reportable issues to ensure corrective action has been taken to prevent the error from reoccurring,
- Provides auditors with fund data for the preparation of each school's annual audit,
- Maintains and updates the Audit Compliance Supplements,
- 500, 000 audit threshold tracking (A-133 subpart sec...200(d),
- Indirect cost (EDGAR 76.561(b),
- Researches and maintains knowledge of current legislative guidelines,
- Carry-over limitation/Administration,
- Monitors (EDGAR 80.40) – participates in on-site monitoring visits that are headed up by the program administrators for the various grants, and

- Responsible for Impact Aid and maintaining the files for each application submitted to the federal government.
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**Current
Initiatives**

- Maintains FBS web site to inform and provide up-to-date policies, and information for LEAs and charter schools to access (Policy manual, COA, Finance Officer Certification), and
- Streamlines and re-focuses certain responsibilities and procedures so that all customers, both internally and externally are better served and satisfied. Updates and provides LEAs with latest changes in Medicaid reimbursement programs (Fee for Service and Administrative Outreach),
- Provides awareness of NC WISE and other system implementation processes and cost as DPI deploys new systems for data gathering,
- Responds to request for information from districts; state and federal government officials; organizations; and other interested parties; both written and verbal, and
- Attends, participates, and presents in workshops for both internal and external staff development.

Systems Accounting Section

Staffing Overview

The total number of personnel in the Systems Accounting Section is 5.

Section

Goals

- Support all areas of Financial and Business Services
 - Ensure accurate and timely data management
 - Planning, development, implementation and maintenance of both automated and manual processes
 - Align internal and external procedures to comply with applicable statutes and policies
 - Document processes and make recommendations for improvement to all Areas of DPI
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Section

Responsibilities

Management – Kris Knower, Section Chief 807-3616

- Provides leadership, policy development, and direction for the work of the section

System Support

- BUD/IRM
- Salary
- SAR – Student Activity Report
- SNA – School Name & Address – being replaced by EDDIE
- PMR – Principal Monthly Report
- AFR/MFR – Annual/Monthly Financial Report
- GL External
- Allotments
- Charter School Process
- Reversions System
- Federal Time Reporting Database
- Budget Status Reports
- Child Nutrition Claims System
- Accounts Payable
- Travel
- Textbook Warehouse
- Cash Management
- GEAC Internal – NCAS
- ACH/Common Payment System
- BEACON Reporting
- EVAAS
- School Insurance
- Licensure/Salary

- Multiple Access Databases used in FBS

Security

- IRM/BUD
- GL External
- Salary Web Security
- FBS Server
- eProcurement
- RACF
- NCAS
- Core Banking
- Budget Status Report
- Textbooks (NCAS & XPTR)
- Child Nutrition

Other

- Year-end coordination
- Assist with Project Management
- Audits as requested by management
- NCCEDARS (NC Common Education Data Analysis Reporting System)

Licensure Section

Staffing Overview

The total number of personnel in the Licensure Section is 24.

Section Goals

- Ensure operational excellence in issuing licenses according to the policy and laws set forth by the NC General Assembly and the North Carolina State Board of Education
 - Provide prompt and courteous customer service with a high degree of accuracy
 - Provide communication and support to the Local Education Agencies and teachers with their licensure needs
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Section

Management – Susan Ruiz, Section Chief 807-3316; Nadine Ejire, Asst. Section Chief; Shelia White, Program Manager; and Linda Rogers, Processing Supervisor 807-3310

Responsibilities

- Provides leadership, policy development, and direction for the work of the section
- Responds to policy issues from local education agencies' personnel administrators and licensure specialists
- Responds to policy issues for General Assembly staff
- Plans, coordinates and implements licensure training across the state for local school systems, charter schools, non-public schools and others
- Presents licensure updates to organizations such as State Board of Education, Education Oversight Committee, RESA Directors, PANC, School Leadership, etc.
- Issues licenses for all professional employees of public schools in North Carolina
- Ensures No Child Left Behind data is current in Licensure system
- Attends regional meetings for Personnel Administrators of North Carolina
- Attends national conferences related to Licensure and Professional Practices
- Maintains Licensure Section website content
- Receives daily fees for licensure processing

- Maintains renewal plans for non-public schools and charter schools

Licensure Request Types

- New Out-of-State Application
- New In-State Application
- Experience Review
- Upgrading a License
- New Application for Employed Person
- Lateral Entry License
- Clearing Provisions on a License
- Career & Technical Licenses
- Request for a Continuing License
- Renewal License
- Adding Experience to a License
- Emergency Permits for Non-Core Academic Teaching Areas
- Deleting an Area on a License
- Name Change
- Social Security Number Change
- Duplicate License Request
- Address Change
- Adding Provisional Areas
- Validation of Expired License