



An Analysis of North Carolina's Private School Landscape

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Executive Summary

We survey North Carolina’s private school landscape, describing: the agencies and associations that most frequently interact with schools in this sector; relevant legislative and policy developments that have shaped the private school sector in recent years; and the availability and usefulness to researchers, policy makers, and practitioners alike of relevant administrative data. Paying particularly close attention to the state’s means-tested private school voucher program—the North Carolina Opportunity Scholarship Program—we summarize key trends since 2014-15 to 2017-18 and digitize original data that have never before been analyzed in a comprehensive manner to shed light on this understudied but diverse school sector. Our primary findings are as follows:

- **Data availability:** Data on North Carolina’s K-12 private schools are available from three primary sources: The Division of Non-Public Education (DNPE), the North Carolina State Education Assistance Authority (SEAA), and the National Center for Education Statistics’ Private School Universe Survey (PSS).
 - o Each data source is limited in scope and quality, with the primary limitations being their format and accessibility, the extent of their coverage, and the use of identification numbers assigned to private schools that are non-transferrable not only between sources but sometimes within sources across years as well.
- **Private school density:** Although private schools are distributed somewhat evenly across the entire state, there are visible clusters of schools that accept students through the state’s Opportunity Scholarship voucher program. These clusters occur in the following urban areas: Burlington, Charlotte, Durham, Greensboro, and Raleigh. These cities represent the following geographic regions: the Piedmont, Charlotte Metro, Triangle, and Triad regions.
- **Private school diversity:** We summarize the religious affiliation of private schools participating in the state’s Opportunity Scholarship voucher program. The largest group is Christian schools with no specific religious denomination (30 percent), followed by nonsectarian private schools (24 percent), Baptist schools (21 percent), and Roman Catholic schools (10 percent).
 - o The remaining affiliations each represent less than five percent of the total number of schools but demonstrate the rich diversity of offerings for a wide range of religious groups, including Islamic, Presbyterian, and Jewish students.
 - o Approximately two-thirds of students who participated in the Opportunity Scholarship voucher program in 2017-18 attended either a Christian school with no specific denomination (37 percent) or a Baptist school (32 percent).
- **Demand:** The regions of the state experiencing the greatest demand for private school choice (as expressed by the relative size of populations enrolled in the Opportunity Scholarship voucher program) include the areas surrounding Burlington, Charlotte, Durham, Fayetteville, Greensboro, Jacksonville, Raleigh, and Winston-Salem. These cities represent the following geographic regions: the Piedmont, Charlotte Metro, Triangle, Sandhills, Triad, and Coastal regions.
 - o The top ten most popular private schools of choice (by total enrollment of voucher-holding students) represent a rich diversity in terms of locales (Charlotte, Durham, Fayetteville, Greensboro, Monroe, Raleigh, and Richlands) and faith traditions (Baptist, Other Christian, and Islamic).

- **Proximity:** Distance between school and home appears to play a role in whether or not an eligible student ultimately enrolls in a private school for which they applied by way of the Opportunity Scholarship program. Among the top ten private schools with Opportunity Scholarship enrollees:
 - o The median distance between a student’s home ZIP code and his or her school of choice is 4.3 miles for those who enrolled in a private school, compared to 5.7 miles for those who applied but did not ultimately enroll in a private school of choice.
 - o The median time travelled from a student’s home ZIP code to his or her school of choice is 9.5 minutes for those who enrolled, compared to 10.5 minutes for those who did not enroll
 - o The two schools for which state-funded scholarship students travel the farthest to attend, on average, are Liberty Christian Academy in Richlands (on average, recipients of the Opportunity Scholarship travel 12.2 miles to attend this school) and Victory Christian Center School, in Charlotte (on average, recipients of the Opportunity Scholarship travel 12.1 miles to attend this school).

- **Testing:** The most commonly used nationally-normed standardized assessment among private schools that participated in the Opportunity Scholarship program in 2017-18 was the Iowa Test, used either alone or in conjunction with another assessment (54 percent of schools).
 - o By religious affiliation: Among the Roman Catholic schools that participate in the Opportunity Scholarship program, the Iowa Test is the most popular, used in all but two schools. In contrast, the Islamic schools in Durham and Raleigh rely on the TerraNova assessment.
 - o Consistency: Most schools are remarkably consistent over time in their choice of nationally-normed standardized assessment, rarely changing to a different one.

- **Tuition:** In the 2016-17 school year, the median tuition charged in North Carolina private schools was \$5,483. The minimum tuition value was \$2,025 and the maximum tuition value was \$27,500.

Introduction

The purpose of this report is to describe the private school landscape in North Carolina, with particular attention given to aspects of the landscape that are most relevant to the state’s voucher program, the Opportunity Scholarship. The report includes an analysis of the major federal and state agencies that interact with and collect data on North Carolina’s private schools, important legislative and policy shifts that have affected this sector in recent years, and a comprehensive assessment of the availability and usefulness of data for public or research use. Using extant and original data, we also provide a statistical overview of the contemporary private school landscape. We begin by providing an overview of the regulatory landscape and relevant agencies and organizations that interact with the private school sector.

Historical Regulatory Landscape

In 1979, the state legislature transferred legal oversight over the private school sector from the State Board of Education and Department of Public Instruction to the Office of the Governor. Thus, today the state entity with primary jurisdiction over private and home schools in North Carolina is the Division of Non-Public Education (DNPE), which resides within the Department of Administration, a division of the Executive Branch. The relevant legislation from which DNPE derives its purpose and authority is Article 39, Chapter 115C of the North Carolina General Statutes.¹ Regulations required under Article 39 (described below) are limited in scope. As such, DNPE does not have extensive contact and interaction with private schools, and the records maintained and posted for public use are not comprehensive.

Article 39 requires private schools to maintain attendance and disease immunization records and to conduct fire, health, and safety inspections. Furthermore, standardized testing is required in grades three, six, and nine, using an assessment selected by the private school that measures achievement in the areas of English grammar, reading, spelling and mathematics. Records of student results must be maintained by the school for one year. Eleventh grade students also must take a high school competency exam, scoring above a minimum threshold determined by the school in order to graduate.

Beyond initial registration with the state, Article 39 does not require state or third-party private school accreditation or licensing. Upon establishment of a new private school, a representative must simply notify the DNPE of the intent to operate a school, the name of the owner and chief administrator, and the school name and address. Similarly, a representative must notify the DNPE when a private school closes. Article 39 does not require teacher certification or any curriculum requirements and, unlike states such as Louisiana, where private schools receive state assistance for purchasing textbooks, North Carolina’s private schools do not receive any form of reimbursement from the state for this expense (U.S. Department of Education, 2009).

State-Funded Private School Choice Programs

The enactment of three private school choice programs in recent years—the Opportunity Scholarship program, the Disabilities Grant program, and the Education Savings Account program—has brought a second state agency into more frequent contact with the state’s private schools: the North Carolina State Education Assistance Authority (SEAA). This state agency originally was established to promote access to

¹ https://www.ncleg.gov/EnactedLegislation/Statutes/HTML/ByArticle/Chapter_115C/Article_39.html

higher education in North Carolina by administering financial aid and college savings programs, but in recent years, the agency's responsibilities have expanded to include administration of state-funded K-12 scholarship programs. Specific administrative responsibilities for these programs include interacting with families and schools to manage the application and award processes, ensuring that participating private schools meet program requirements, verifying student eligibility, and disbursing grant funds.

The Opportunity Scholarship program is the largest of these three private school choice programs. In 2019-20, 12,009 students enrolled in 447 private schools with assistance from the Opportunity Scholarship program. The Disabilities Grant is the next largest school choice program, with recent data indicating 1,850 students (240 new students and 1,610 renewal students) enrolled in this program in 2019-20. Finally, 282 students (47 new students and 235 renewal students) enrolled in the Education Savings Account program in 2019-20. Participating school lists by program are overlapping, as some students qualify for multiple vouchers (e.g., a low-income student with a disability could qualify for both the Opportunity Scholarship program and the Disabilities Grant), and individual private schools can serve students through one, two, or all three programs. Thus, it is hard to discern the total number of unique private schools that interact with SEAA but it is over 62 percent of all private schools in the state.²

Third-Party Support

Finally, North Carolina has a number of national and state-level private school organizations with which private schools may associate voluntarily. These include the American Association of Christian Schools, the American Montessori Society, the Association of Christian Schools International, the Council for American Private Education, the National Association of Independent Schools, the National Council for Private School Accreditation, the National Independent Private Schools Association, the North Carolina Association of Independent Schools, the North Carolina Christian School Association, the Roman Catholic Dioceses of Raleigh and Charlotte, the Seventh Day Adventist Schools, and the Southern Association of Independent Schools.

² In 2019-20, 447 unique private schools participated in the Opportunity Scholarship program alone. DNPE reports there were 720 total private schools in operation in the state that year.

Data Sources

Data on North Carolina's K-12 private schools are available from three primary sources.

First, DNPE publishes an annual report of limited private school statistics that consists of enrollment counts by county, grade, gender, and school type (i.e., whether a school classifies itself as a religious or independent school). Historical data on these enrollment counts is available as far back as the 1961-62 school year. DNPE also publishes lists of schools that have closed or opened in the past year, and a private school directory that includes a physical and mailing address and the name of the school's chief administrator. The information that is summarized for the annual enrollment report and private school directory is collected in one-page, hard copy forms that are mailed to DNPE by private schools annually (a sample is provided in Appendix A). These data collection instruments gather more information than what is compiled for public reporting, but these individual school records can be accessed via public records request only. Additional variables not reported in the summary files but accessible in the individual school reports include whether or not the school is a boarding school, term dates, which specific standardized test is administered, when the tests are administered, and the school's religious affiliation. Unfortunately, not every school submits this form every year (schools that received an in-person visit from DNPE, which visits a proportion of all private schools each year, are not required to complete the standard data collection form that year), leading to nontrivial missing data.

Second, SEAA publishes annual lists of the private schools that participate in the three K-12 private school choice programs it administers: The Opportunity Scholarship program, the Disabilities Grant, and the Education Savings Account program. In addition to posting lists of participating private schools, SEAA documents and makes publicly available the number of new applicants and the number of scholarship recipients by private school. SEAA also is required to collect additional private school data that are not posted to their website for the general public to access but potentially could be requested under a data sharing agreement with the agency. These data include documentation of the school's current tuition and fees and a criminal background report for the private school staff member with the highest decision-making authority. Finally, SEAA is required to collect individual test score data for all students who participate in the Opportunity Scholarship program, in addition to summaries of aggregate test scores for private schools that enroll more than 25 Opportunity Scholarship students. Private schools that receive more than \$300,000 from any one of the choice programs in a single school year also are required to submit a financial review that has been prepared by a certified public accountant licensed by the state.

Third, the federal government conducts a biennial survey of elementary and secondary private schools known as the Private School Universe Survey (PSS). Since the 1989-90 school year, the National Center for Education Statistics (NCES) has been collecting biennial data on the total number of private schools, teachers, and students in the United States. The target population for this survey is all private schools in the United States, and to reach this desired sampling frame, the list of private schools targeted by NCES is updated regularly with information provided by national private school associations, state departments of education, other private school guides, and the Bureau of the Census. Beginning with the 1997-98 school year, PSS data for all 50 states are available through the Elementary and Secondary Information System on the NCES website, which is a publicly accessible database.³ Fields include: school location; school characteristics, such as the length of the school day and the presence of a library or media center; grades taught; religious affiliation; school enrollment

³ <https://nces.ed.gov/ccd/elsi/>

by grade and race/ethnicity; the pupil teacher ratio; and the number of full-time equivalent teachers on staff.

The primary limitations of these three data sources for researchers interested in studying the private school sector relate to their format and accessibility, their coverage, and non-transferrable identification numbers assigned to private schools within and between sources. We explain the details of these three challenges below.

Data Challenge 1: Format and Accessibility

To gain a better understanding of precisely what data are collected by DNPE, we submitted a two-part public records request in August of 2016. Specifically, we asked for copies of:

1. The spreadsheet or database used for the past five years by DNPE to compile the data summarized in the annual public report; and
2. The single-sheet data collection forms submitted by every private school, for the past five years.

After submitting this request, we learned that the spreadsheet used to summarize data for the annual report is not saved from year to year, which means that there are no historical copies of the file available from prior years—only for the current year. As one staff member explained:

“We input data from the Annual Report form in the database, and then use the database information to generate our Non-Public Schools Directory —Conventional Schools Edition (posted as a PDF on our website each June). This PDF is automatically generated by the database after clicking Print → Directory. After generating the Directory, we then begin over-writing the database information with the school’s information from the current school year, so all past data is no longer in the database, and not able to be loaded into a spreadsheet.” (Email correspondence with DNPE, August 2016)

In 2016, we also learned that DNPE’s one-page data collection forms for individual private schools were not collected electronically, such as through a web form, nor were they stored electronically in a manner that would allow for easy sharing. Thus, to access these records, we hired a research assistant to visit their offices in-person, where cardboard boxes full of historical binders of handwritten documents were made available to her for scanning over several days. Data later were extracted from these scanned documents by a team of research assistants working over several months to digitize the records and build a usable electronic database. Without the resources to pay for research assistants or access to a portable scanner, we would not have been able to access these data, raising questions about equity of accessibility to the private school data collected by the state of North Carolina.

Issues related to data format and accessibility also were apparent in SEAA records. For example, although DNPE unfortunately does not collect information on private school tuition that would allow the general public to gain a sense of the average, minimum, and maximum tuition rates charged in private schools across the state, SEAA does request this information for private schools that participate in a publicly-funded K-12 private school choice program. We requested access to these documents, but in part because of its small staff, SEAA only was able to provide the records in the formats in which they were received (.pdf, .doc, .jpg, .xls, .tif), and

the records contained widely varying levels of information (examples are provided in Appendix B). After recent upgrades to the data system at SEAA, it has become much easier to download data about the tuition schools are actually charging students. During payment processing, schools “certify” their students, which means they report several data points regarding tuition: annual tuition which would be charged to a student at that grade level, actual annual tuition charged to that particular student (the first data point minus any special deals), and the fall and the spring tuition. These data differ from the public-facing tuition information documents the public can access but are very helpful to the research community analyzing actual tuition payments.

Data Challenge 2: Incomplete Coverage

All three databases suffer from some form of missing data, resulting in incomplete coverage of North Carolina’s private school landscape.

The issue of missing data in DNPE files is pervasive, due in large part to the division’s practice of declining to collect annual data from those private schools that receive an on-site visit in a given year. All schools receive such visits in their first year of operation and every two to three years thereafter, which guarantees substantial missing data in longitudinal records.

Fortunately, because of the transfer of state funds to support eligible students’ private school tuition, the private school records that must be collected by SEAA are more comprehensive. Beyond student enrollment confirmation, however, there is no consistency in the other types of data collected. For example, every private school that accepts students through the Opportunity Scholarship program is required to submit test score information, but some may do so in a format that is unreadable, incomplete, or in a corrupted file format. If the evaluation mandate in the legislation that enacted this voucher program⁴ were to be funded, its completion likely would necessitate changes in the format and types of test score data that are submitted, as well as a scale-up in SEAA personnel to allow for persistent follow-up communication with private schools that fail to submit scores altogether.

Finally, federal records also suffer from incomplete coverage. The goal of the PSS is to allow researchers to “address a variety of policy- and research-relevant issues, including the growth of religiously affiliated schools, the number of private high school graduates, the number of days in the school year, and the number of private school students and teachers,” but because the PSS is a volunteer survey of private schools, it inevitably has incomplete coverage (NCES Handbook of Survey Methods, 2008). NCES estimates the traditional private school coverage rate was 89.1 percent in 2015-16 (NCES handbook of Survey Methods, 2008); the coverage rate for private schools in which the highest grade is Kindergarten was even lower (76.5 percent).

Data Challenge 3: Non-Transferable Identification Numbers

One of the primary challenges for researchers wishing to study North Carolina’s private schools is the issue of non-transferable identification numbers.

DNPE assigns all new private schools an identification number when the school first opens and a representative files a Notice of Intent, but this number is only intended for internal use and identification purposes by DNPE staff. Thus, it is not shared with the general public, other agencies, or researchers. The

⁴https://www.ncleg.gov/EnactedLegislation/Statutes/HTML/BySection/Chapter_115C/GS_115C-562.2.html; no such evaluation has been funded since the inception of the program in 2013

rationale for maintaining the confidentiality of these numbers is unclear but the benefits for researchers would be far-reaching.

Second, the private school data publicly posted on SEAA's website include no identification numbers, simply listing school name and the city in which a school is located. For internal purposes, SEAA does assign schools unique identification numbers but these are not the same identification numbers used by DNPE, making it challenging to accurately and comprehensively merge data from both sources. For example, our efforts to merge on school name and location alone resulted in multiple matches given the frequency of certain school names (e.g., "Trinity Academy").

Finally, NCES issues a third, distinct identification number to all private schools that voluntarily participate in data collection for the PSS. Schools are not required to participate in this federal data collection activity, so the NCES identifier is not universal. Furthermore, we do not know of a cross-walk that connects all three types of private school identification numbers.

Methodology

Our research team collected and merged private school data from all three sources described above—DNPE, SEAA, and the PSS. In this section, we describe the process of accessing and analyzing data from these three sources, ranked from most to least effort required to generate a usable database.

In order to work with DNPE data, the data source requiring the most labor-intensive effort, we had to create a digital database from scratch. We sent a research assistant to the Department of Administration to scan PDF files of individual private school data collection forms from 2012-13 to 2017-18, then hired a team of research assistants to digitize these files over the process of several months. For each year of data, we independently vetted school openings and closings to ensure the accuracy of annual school lists.⁵ Because we did not have access to private school identification numbers from DNPE, we also invested considerable time in independently vetting individual school addresses to ensure we were tracking schools over time accurately. One of the most serious data limitations uncovered during this process was the discovery that all state-supplied data for 2013-14 were just duplicates of 2012-13 data—in other words, the data from 2012-13 had been transposed and re-labeled as 2013-14 data, without any actual updates. Our final database included the following fields: county, school name, mailing address, physical address, website, email, chief administrator, owner, number of staff members, school type (independent or religious), an indicator for boarding schools, calendar type (traditional or non-standard), standardized test(s) administered, tested grades, enrollment by grade and gender, and grades served.

SEAA data were easy to download as PDF files from their website, which we then converted to Excel files for analysis. These data are regularly updated and historical records remain publicly posted over time. The specific data fields available to the public include: the number of new and renewal students for each private school choice program each year; the number of recipients by private school, by ethnicity, and by county; and the dollar amount disbursed to each individual private school, by year. We used SEAA lists of private schools participating in the state's largest private school choice program to add a variable to our newly-created digital database of DNPE records so that we could identify school participation in this choice program by year. To access additional restricted-use data in an editable format at the student and school level, we established a data sharing agreement with the agency. We also worked with the agency to provide two research assistant interns to help organize data files, such as extracting information on private school tuition and tests from individual files into a common, usable database.

Finally, PSS records are easy to access by the general public and researchers alike, as they are posted online at the website of the U.S. Department of Education and can be downloaded immediately in Excel format through the Elementary and Secondary Information System's Table Generator, which does not require a formal data sharing agreement. Private school data are available for all fifty states in the following years: 2017-18, 2015-16, 2013-14, 2011-12, 2009-10, 2007-08, 2005-06, 2003-04, 2001-02, 1999-00, and 1997-98.

Having merged data from all three sources, we analyzed the newly-created database to generate insights about North Carolina's private school landscape. The primary findings are described in the next section.

⁵ It was not uncommon for a school to have closed in a prior year but still be listed as open the following year.

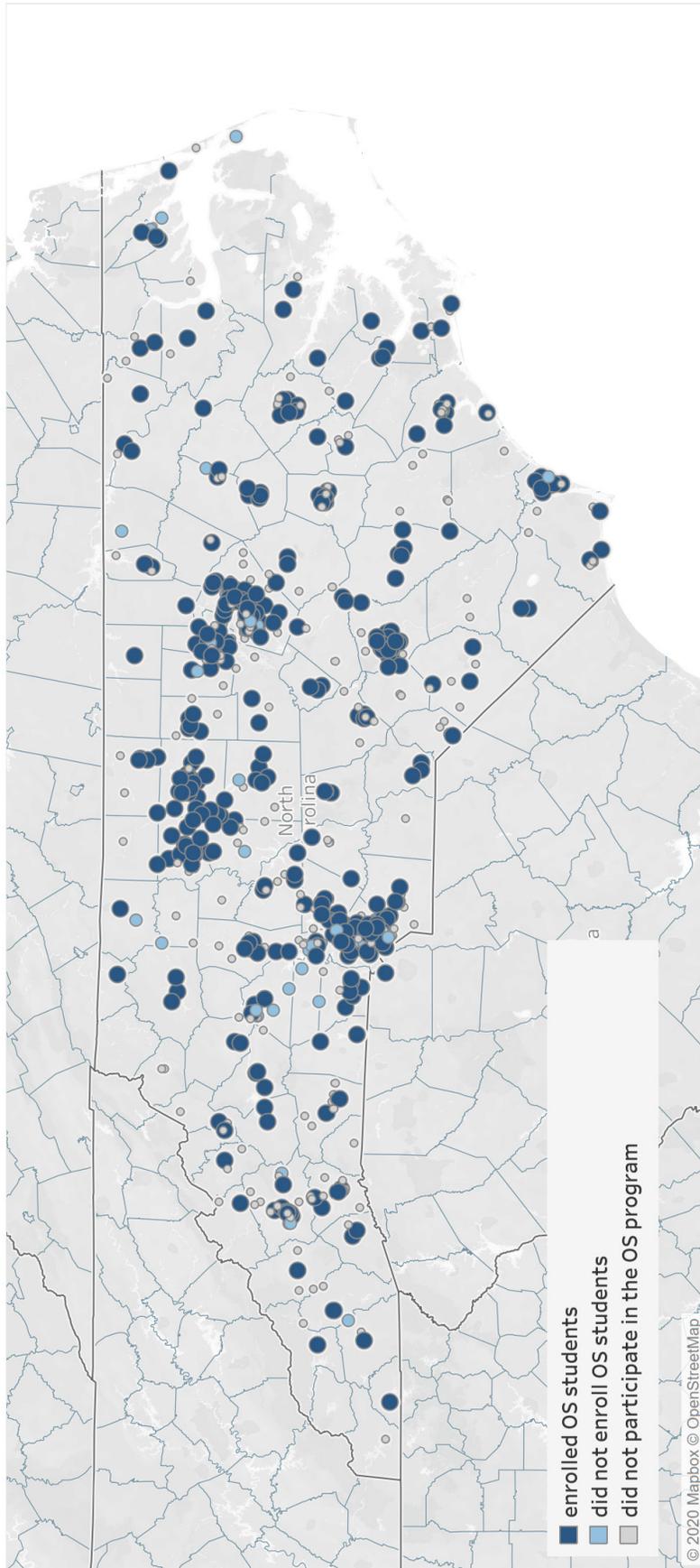
Finding 1: Private School Participation in Publicly Funded Choice Programs

In order to systematically track changes in the distribution of private schools across the state, generally, and to identify changes in the subset of private schools accepting students through the Opportunity Scholarship program, specifically, we mapped all private schools in the state over time (Figure 1). Schools are color-coded to show three distinct groups:

1. Private schools that accepted applications from and ultimately enrolled students through the Opportunity Scholarship program (dark blue)
2. Private schools that accepted applications from but did not ultimately enroll any students through the Opportunity Scholarship program (light blue)
3. Private schools that did not accept any applications from students wishing to participate in the Opportunity Scholarship program (grey)

Figure 1 displays the 2016-17 map, and Appendix C includes maps for all years from 2014-15 through 2017-18. Although private schools are distributed somewhat evenly across the entire state, there are visible clusters of schools that accept students through the Opportunity Scholarship program in the following areas: Burlington, Charlotte, Durham, Greensboro, and Raleigh. These cities represent the following geographic regions: the Piedmont, Charlotte Metro, Triangle, and Triad regions. Although this figure does not capture the density of student participation (i.e., private school participation is coded in a binary fashion, regardless of how many students were enrolled through the Opportunity Scholarship program), it does show the variation in the number of individual participating private schools by region, which allows the reader to identify those regions of the state with little to no access to private schooling, as compared to other areas of the state that have access to the greatest density of private school choices. Private school access is associated with but does not entirely track population density.

Figure 1. The distribution of North Carolina private schools that did and did not enroll students through the Opportunity Scholarship program, 2016-17.



In addition to examining the density of private schools, it is also instructive to examine the diversity of private school offerings across the state. There are many dimensions along which private schools might distinguish themselves—including their approach to pedagogy, curriculum choices, leadership style, the language of instruction, and approach to assessment— but data availability presents a significant challenge to actually analyzing these differences. Fortunately, data are collected systematically on one dimension by which private schools might differentiate themselves: their religious affiliation. We summarize the religious affiliation of private schools participating in the state’s Opportunity Scholarship program in Table 1, both by number of private schools and by the number of scholarship students accepted, to give a sense of the diversity of offerings available to program-eligible families.

Table 1. Religious affiliation of private schools that participate in the Opportunity Scholarship program, 2017-18

Religious Affiliation	Schools		OS Students Accepted	
	Count	Percent	Count	Percent
Christian (no specific denomination)	129	30	2,700	37
Nonsectarian	101	24	630	9
Baptist	91	21	2,337	32
Roman Catholic	43	10	604	8
Seventh-Day Adventist	14	3	130	2
Pentecostal	8	2	136	2
Assembly of God	7	2	147	2
Islamic	6	1	308	4
Episcopal	5	1	14	0
Lutheran	5	1	20	0
African Methodist Episcopal	4	1	31	0
Presbyterian	4	1	46	1
Friends	3	1	18	0
Methodist	3	1	85	1
Church of Christ	2	0	44	1
Church of God	2	0	76	1
Jewish	2	0	11	0

The largest group of private schools that participate in the Opportunity Scholarship program are Christian schools with no specific religious denomination (30 percent), followed by nonsectarian private schools at 24 percent, Baptist schools at 21 percent, and Roman Catholic schools at 10 percent. The remaining percentages are all small (less than five percent) but demonstrate the rich diversity of offerings for a wide range of religious groups, including Islamic, Presbyterian, and Jewish students.

In addition to examining the distribution by school count, we also can examine the distribution of schools' religious affiliation by student count. Doing so reveals that approximately two thirds of students who participated in the Opportunity Scholarship program in 2017-18 attended either a Christian school with no specific denomination (37 percent) or a Baptist school (32 percent).

To help visualize these data, we also present the data on school counts by religious affiliation as an infographic, which demonstrates the dominance of four primary groups: Christian with no specific denomination, Nonsectarian, Baptist, and Roman Catholic (Figure 2).

Figure 2. Count of private schools participating in the Opportunity Scholarship program by religious affiliation, 2017-18

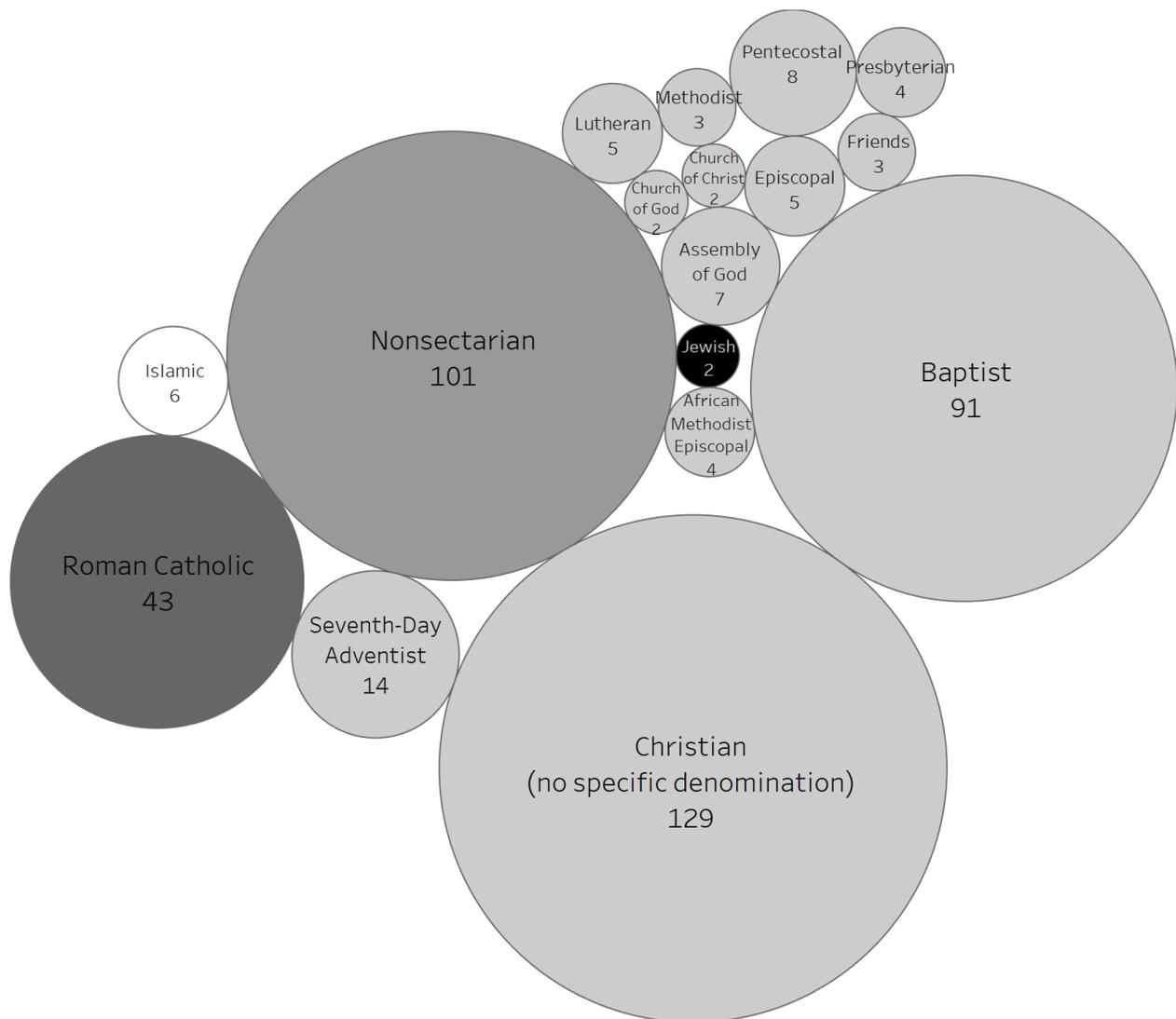
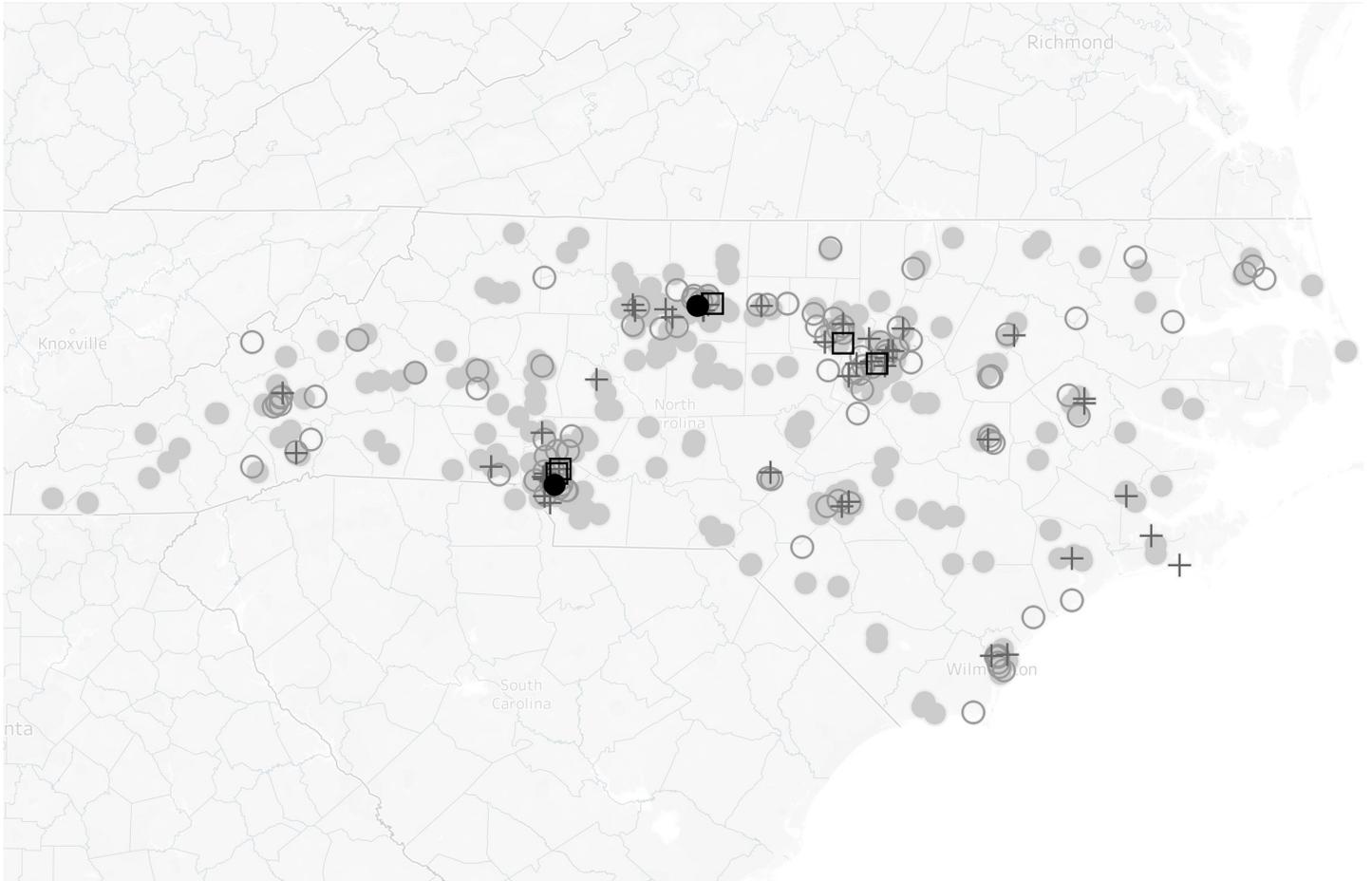


Figure 3. Statewide map of private schools participating in the Opportunity Scholarship program in 2017-18 showing schools' religious affiliation.



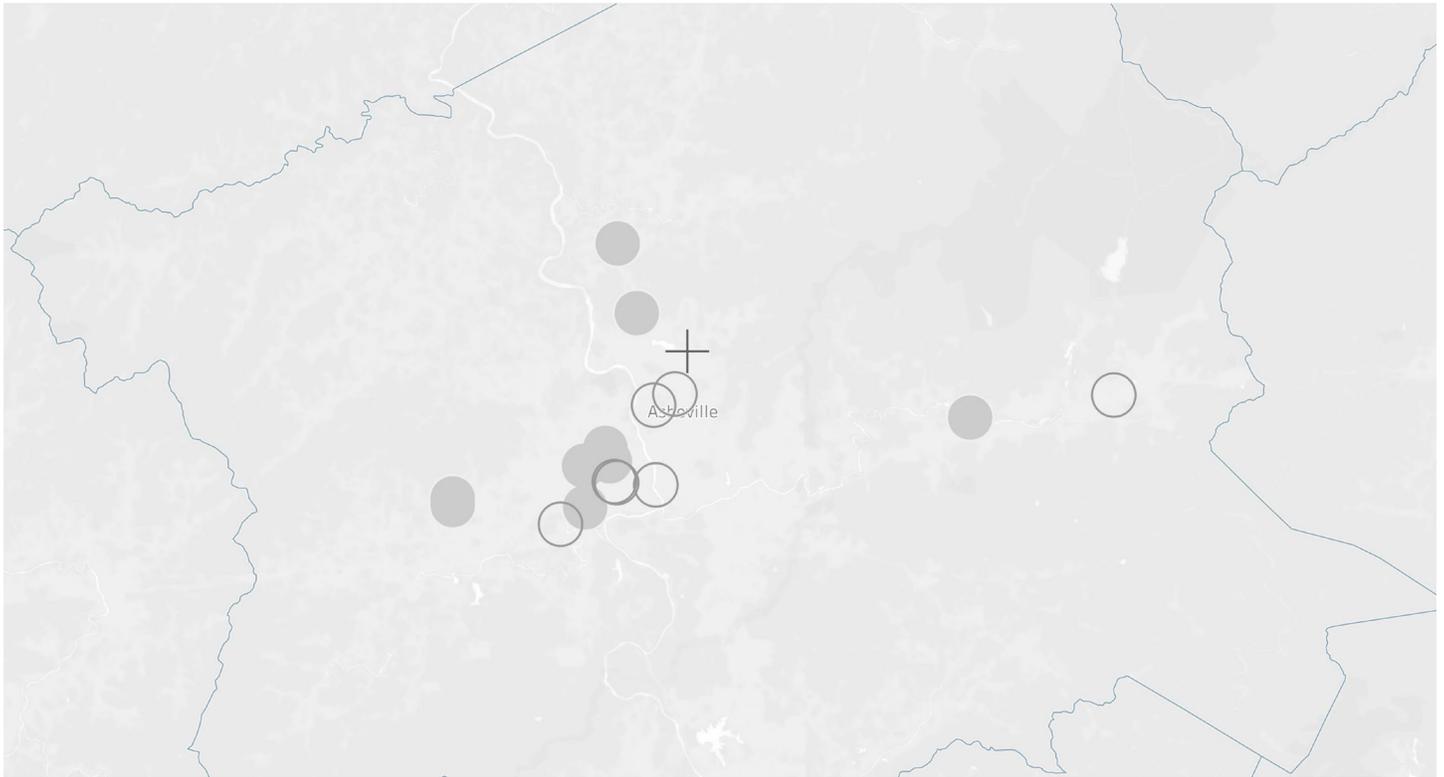
Key:

Jewish	Islamic	Roman Catholic	Nonsectarian	Protestant
●	□	+	○	●

We also created more detailed maps of particularly dense counties to help the reader focus in greater detail on particular regions that might be of interest (Figure 4). Maps are included for Buncombe, Cumberland, Mecklenburg, and New Hanover counties, in addition to the Triad and Triangle regions.

Figure 4. *Inset maps of private schools participating in the Opportunity Scholarship program in 2017-18 showing schools' religious affiliation for high-density counties and regions.*

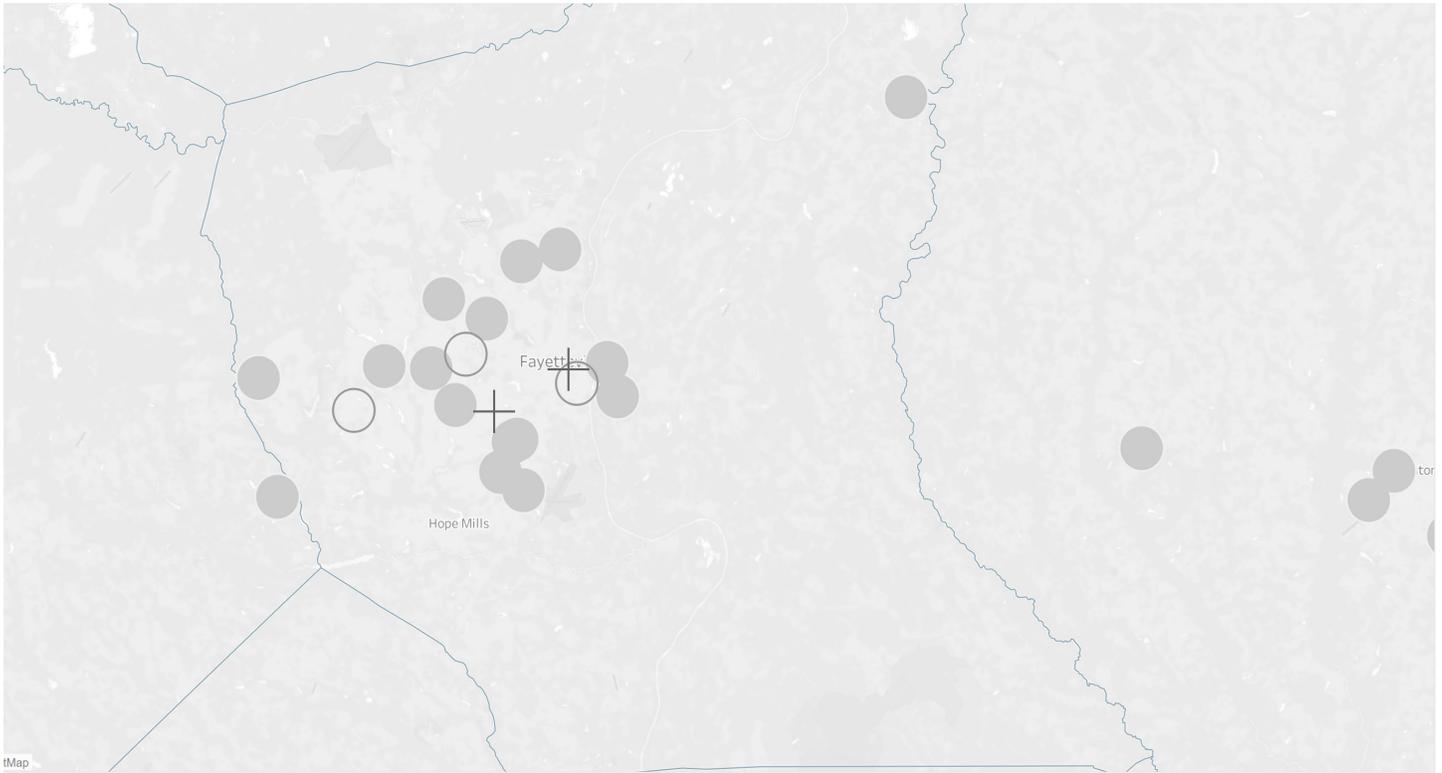
Religious Affiliation of Schools Accepting OS in 2017-2018 - Buncombe Inset



Key:

Jewish	Islamic	Roman Catholic	Nonsectarian	Protestant
●	□	+	○	●

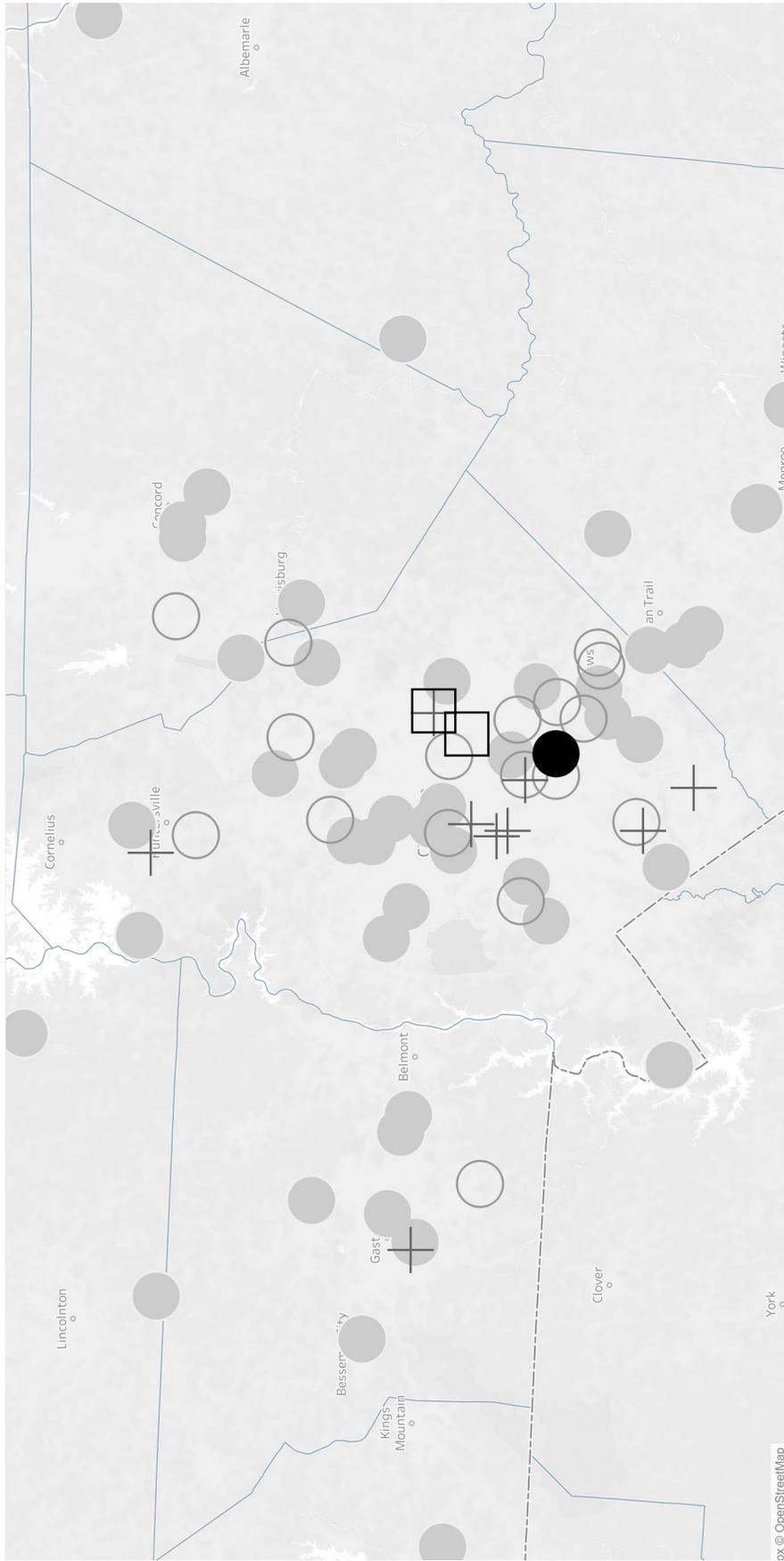
Religious Affiliation of Schools Accepting OS in 2017-2018 - Cumberland Inset



Key:

Jewish	Islamic	Roman Catholic	Nonsectarian	Protestant
●	□	+	○	●

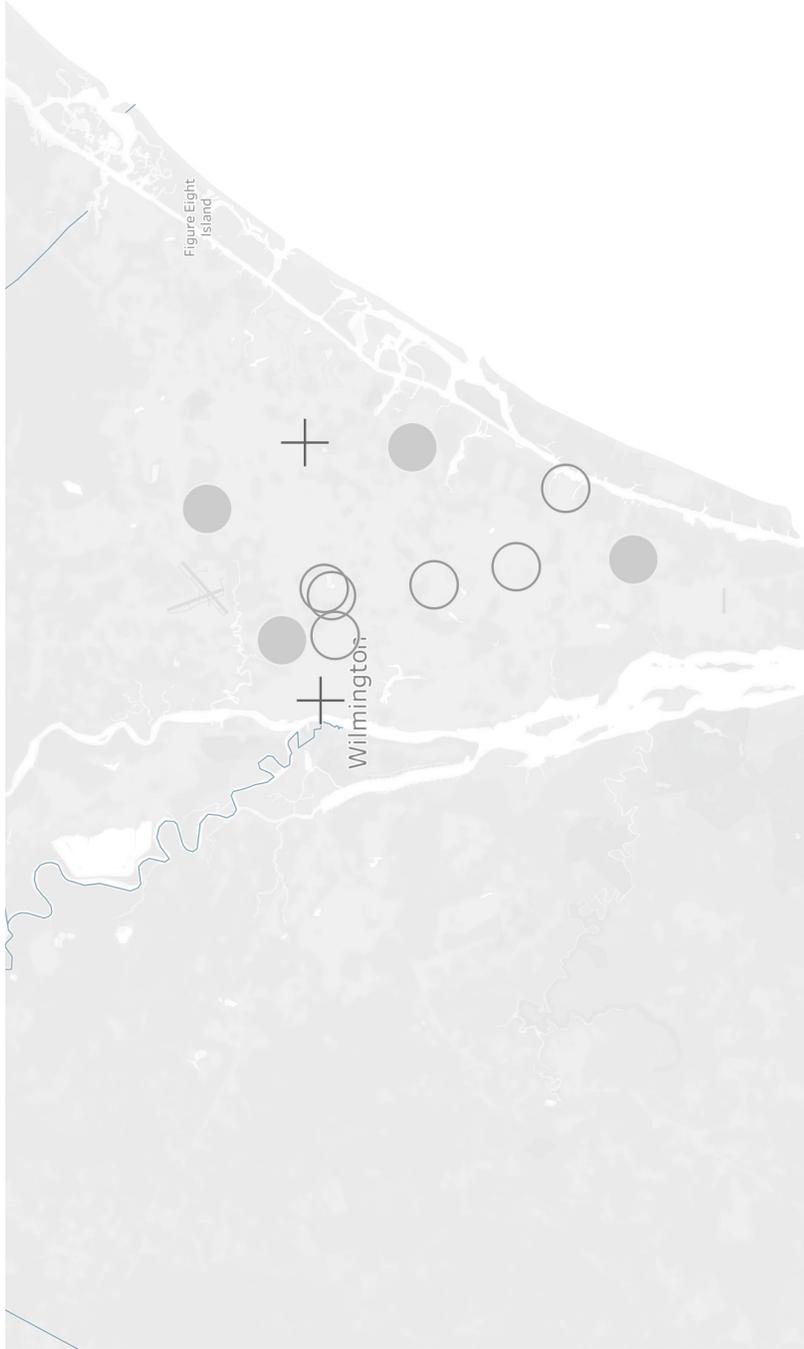
Religious Affiliation of Schools Accepting OS in 2017-2018 - Mecklenburg Inset



Key:

Jewish	Islamic	Roman Catholic	Nonsectarian	Protestant
●	□	+	○	●

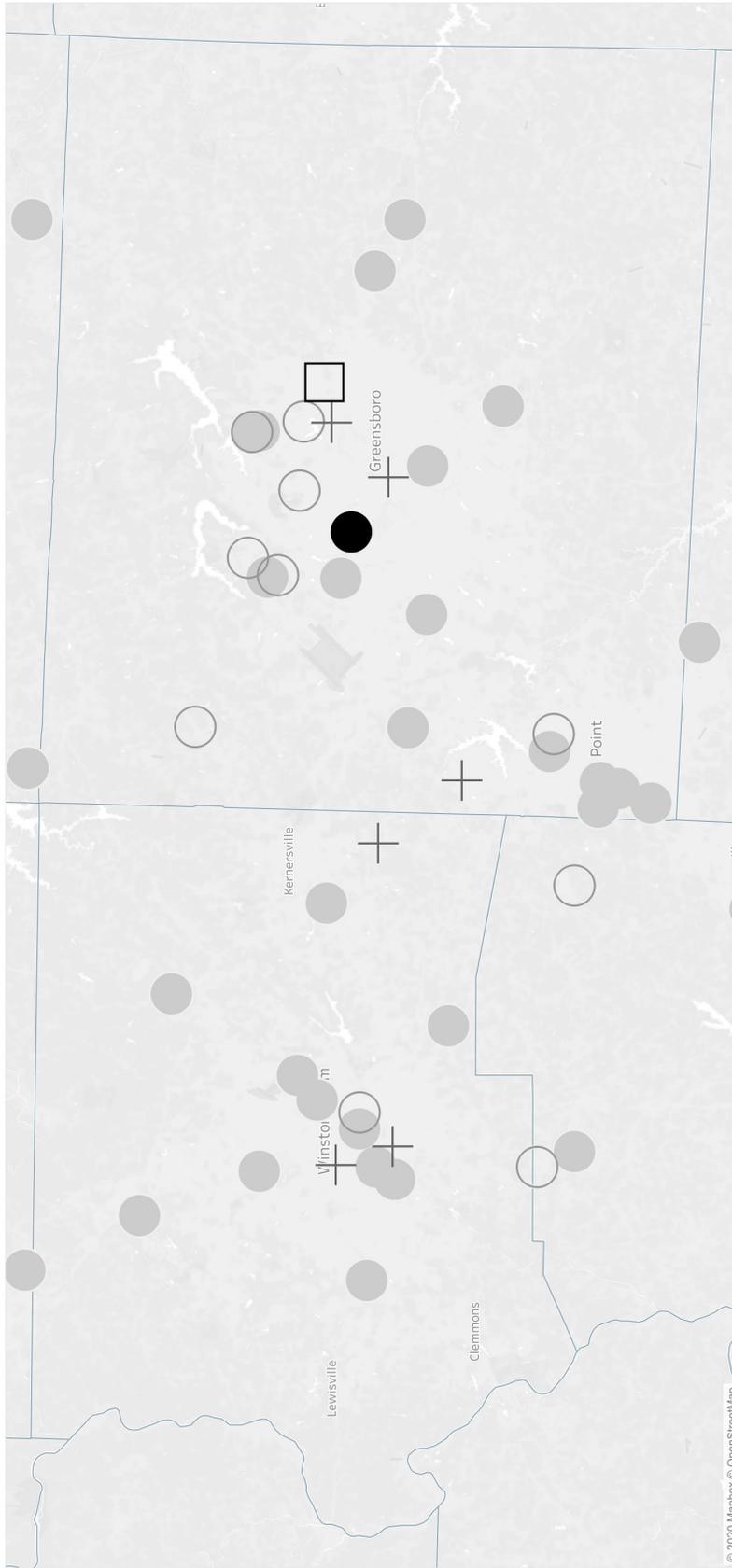
Religious Affiliation of Schools Accepting OS in 2017-2018 - New Hanover Inset



Key:

Jewish	Islamic	Roman Catholic	Nonsectarian	Protestant
●	□	+	○	●

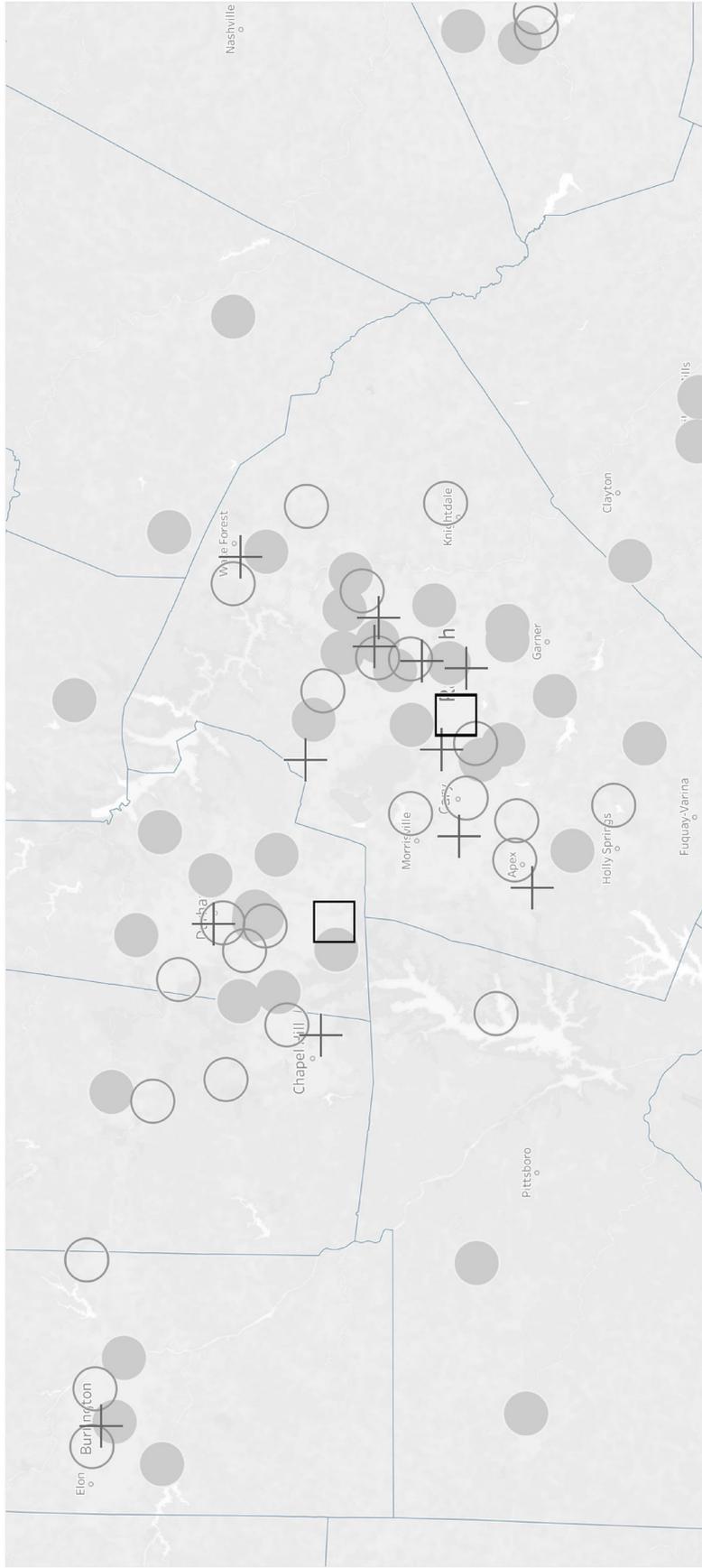
Religious Affiliation of Schools Accepting OS in 2017-2018 - Triad Inset



Key:

Jewish	Islamic	Roman Catholic	Nonsectarian	Protestant
●	□	+	○	●

Religious Affiliation of Schools Accepting OS in 2017-2018 - Triangle Inset



Key:

Jewish	Islamic	Roman Catholic	Nonsectarian	Protestant
●	□	+	○	●

Finding 2: Student Application and Enrollment Patterns

For each year of the Opportunity Scholarship program, we mapped the count of students who applied to the Opportunity Scholarship program by zip code, which allows us to ascertain which regions of the state are experiencing the greatest demand for private school choice. Figure 5 shows the heat map for 2016-17; Appendix D presents maps for all years from 2014-15 through 2017-18. The most popular regions include the areas surrounding Burlington, Charlotte, Durham, Fayetteville, Greensboro, Jacksonville, Raleigh, and Winston-Salem. Of note, the areas with the most interest are not necessarily always the areas with the highest overall population density.

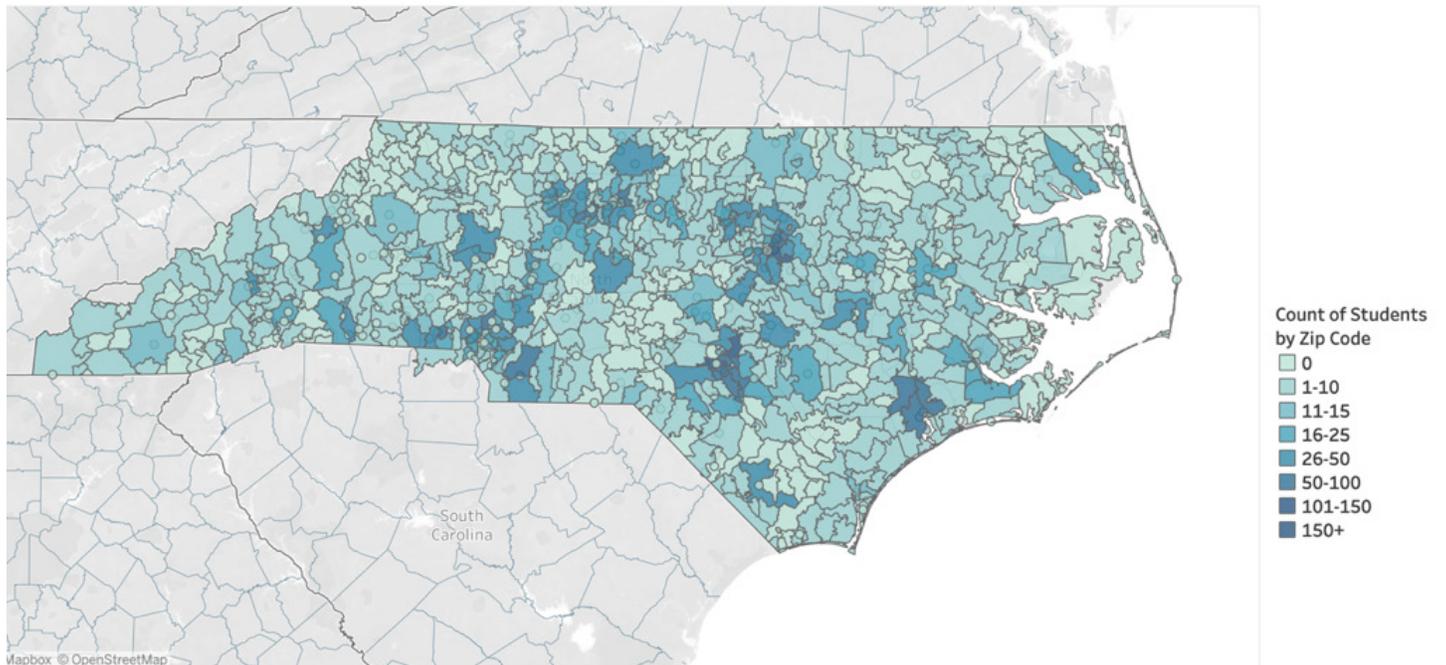


Figure 5. Heat map of applicants to the Opportunity Scholarship program, by zip code, 2016-17

Relying on student application data for the Opportunity Scholarship program to identify the most popular choices, we define the top ten most popular private schools of choice for the 2016-17 school year (Table 2). These ten private schools represent a rich diversity in terms of locales (Charlotte, Durham, Fayetteville, Greensboro, Monroe, Raleigh, and Richlands) and faith traditions (Baptist, Other Christian, and Islamic). Collectively these schools received over 1,900 applications for the 2016-17 school year, yet only a little over half (55 percent) of students ultimately ended up enrolling in these schools, despite their apparent interest in these schools (as revealed through applications for tuition support) and eligibility for scholarship funds.

Proximity appears to play at least some role in whether or not an eligible student ultimately enrolls in a private school for which they applied by way of the Opportunity Scholarship program. We see this reflected in both time and distance measures. Among the top ten private schools, the median distance between a student's home zip code and their school of choice is 4.3 miles for those who enrolled in a private school, compared to 5.7 miles for those who applied but did not ultimately enroll in a private school of choice. Similarly, the median time travelled from a student's home zip code to their school of choice is 9.5 minutes for those who enrolled, compared to 10.5 minutes for those who did not enroll. The two schools for which state-funded scholarship students travel the furthest to attend, on average, are Liberty Christian Academy in Richlands (on average, recipients of the Opportunity Scholarship travel 12.2 miles to attend this school) and Victory Christian Center School in Charlotte (on average, recipients of the Opportunity Scholarship travel 12.1 miles to attend this school). The two schools with the highest maximum travel distance for enrolled students are Greensboro Islamic Academy in Greensboro (88 miles) and Berean Baptist Academy in Fayetteville (83 miles).

We also present ten individual maps to show the catchment areas of students who applied to these private schools in 2016-17 (Figure 6). Separate maps are shown for applicants who did and did not ultimately enroll in that school.

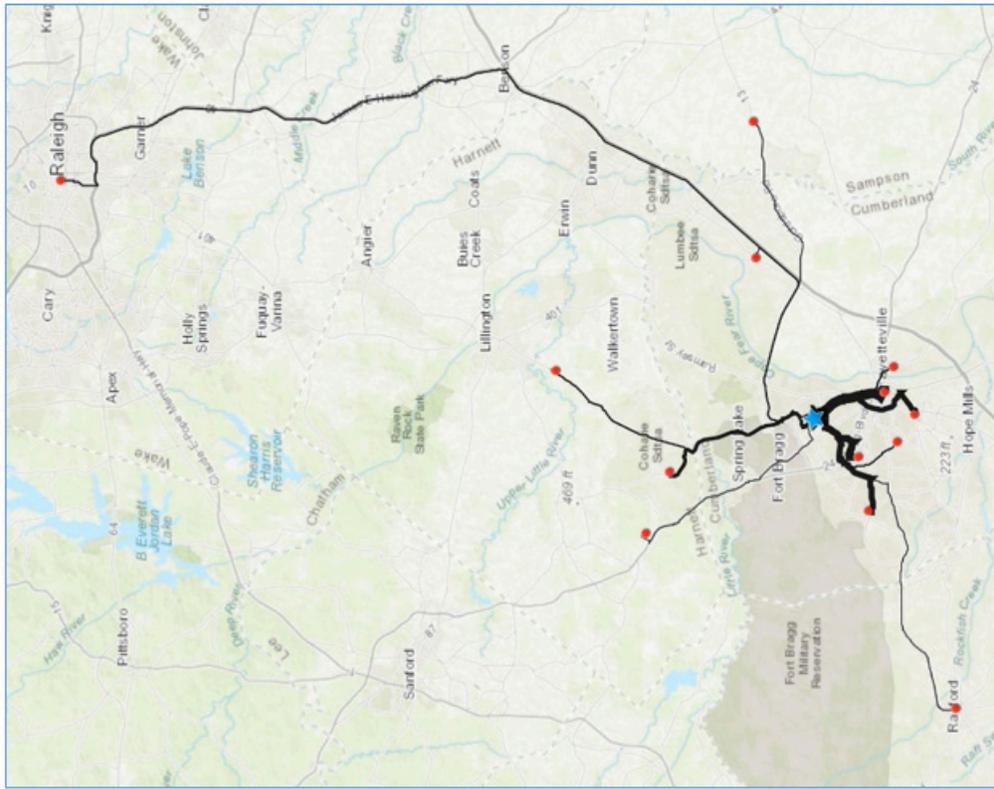
Table 2. Commute time and distance to the top ten private schools by Opportunity Scholarship program applications, 2016-17

#	School Name (Location)	Religious Affiliation	Enrollment Status	Student Applications	Min. Distance	Min. Time	Median Distance	Median Time	Avg. Distance	Avg. Time	Max. Distance	Max. Time
1	Trinity Christian School (Fayetteville)	Christian	Enrolled Did not enroll	169 115	0.0 0.0	0.1 0.1	5.1 5.1	10.0 10.0	5.9 5.3	9.1 8.7	68.0 30.0	68.4 38.6
2	Word of God Christian Academy (Raleigh)	Christian	Enrolled Did not enroll	131 138	3.2 3.2	6.8 6.8	3.2 5.7	6.8 10.9	7.4 8.7	12.4 13.9	38.7 76.1	48.5 86.4
3	Fayetteville Christian School (Fayetteville)	Christian	Enrolled Did not enroll	125 149	1.8 1.8	3.9 3.9	4.7 4.7	9.4 9.4	7.7 11.2	12.8 16.5	36.1 131.0	48.1 131.6
4	Greensboro Islamic Acad. (Greensboro)	Islamic	Enrolled Did not enroll	113 66	1.6 1.6	3.9 3.9	3.5 3.5	7.5 7.5	7.8 6.4	10.8 9.3	88.9 38.0	90.2 39.2
5	Liberty Christian Academy (Richlands)	Christian	Enrolled Did not enroll	96 69	1.2 1.2	1.8 1.8	12.2 12.2	17.9 17.9	10.6 10.5	13.6 13.8	39.5 30.4	44.0 37.0
6	Raleigh Christian Academy (Raleigh)	Baptist	Enrolled Did not enroll	90 55	3.6 3.0	7.9 7.6	3.8 6.8	8.8 12.7	8.0 11.5	13.7 17.7	23.4 59.5	32.4 73.4
7	Victory Christian Ctr. School (Charlotte)	Christian	Enrolled Did not enroll	83 79	6.5 3.1	9.6 6.0	12.1 12.0	19.6 20.0	13.4 15.1	19.5 22.1	80.9 130.5	78.1 153.8
8	Tabernacle Christian School (Monroe)	Baptist	Enrolled Did not enroll	82 40	3.5 3.3	6.6 6.6	3.6 3.8	9.6 9.6	9.4 8.8	15.2 15.1	39.2 59.2	52.3 85.4
9	Berean Baptist Acad. (Fayetteville)	Baptist	Enrolled Did not enroll	81 95	2.5 2.5	5.4 5.4	2.9 2.9	6.5 6.5	7.0 6.3	11.6 10.8	83.1 40.2	88.9 53.9
10	Mount Zion Christian Academy (Durham)	Christian	Enrolled Did not enroll	79 66	3.6 3.4	8.3 7.0	6.3 7.7	11.6 13.6	8.9 14.2	14.9 20.7	107.8 187.9	106.4 187.1
Summary Statistics												
Top 10			Enrolled Did not enroll	1,049 872	0.0 0.0	0.1 0.1	4.3 5.7	9.5 10.5	8.3 9.6	12.9 14.5	107.8 187.9	106.4 187.1
Statewide			Enrolled Did not enroll	5,618 5,678	0.0 0.0	0.0 0.0	6.7 6.7	11.7 11.9	9.0 10.7	13.7 15.6	305.6 336.0	330.3 330.3

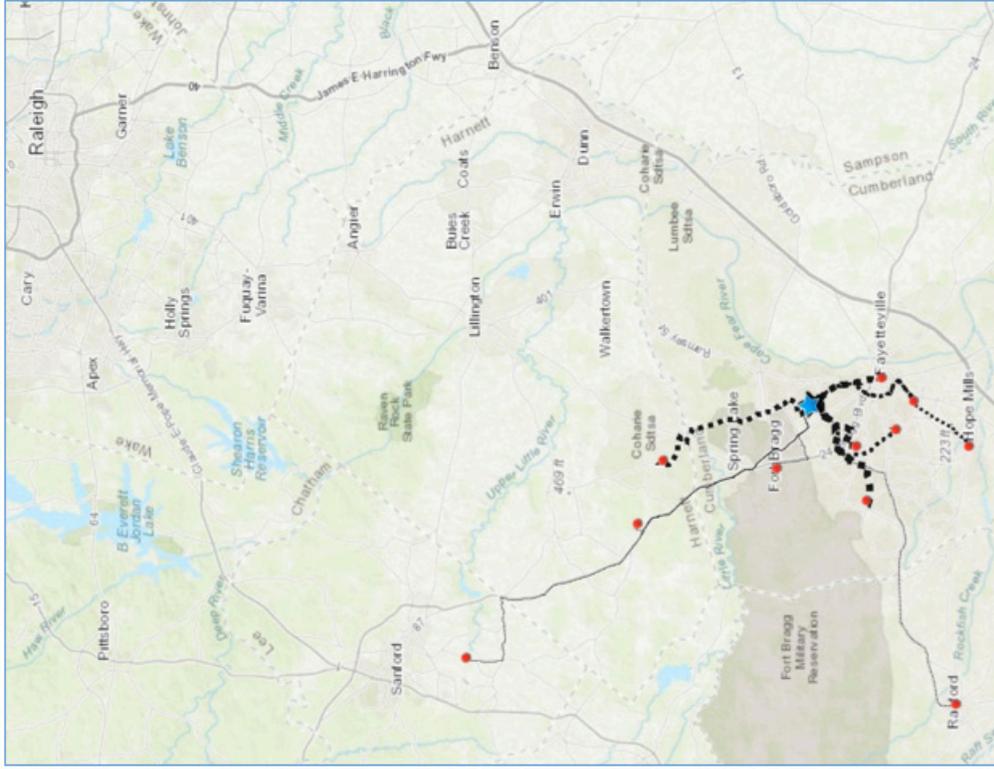
Notes: All distances reflect driving distance in miles from a student's home zip code to their school of choice. All times indicate driving time in minutes from a student's home zip code to their school of choice. The schools with a religious affiliation of "Christian" named here have no specific denomination.

Figure 6. Catchment areas for the ten most popular private schools in 2016-17, as defined by applications to the Opportunity Scholarship program

#1 Trinity Christian School (Fayetteville)



Students who applied for the Opportunity Scholarship and enrolled in their school of choice.

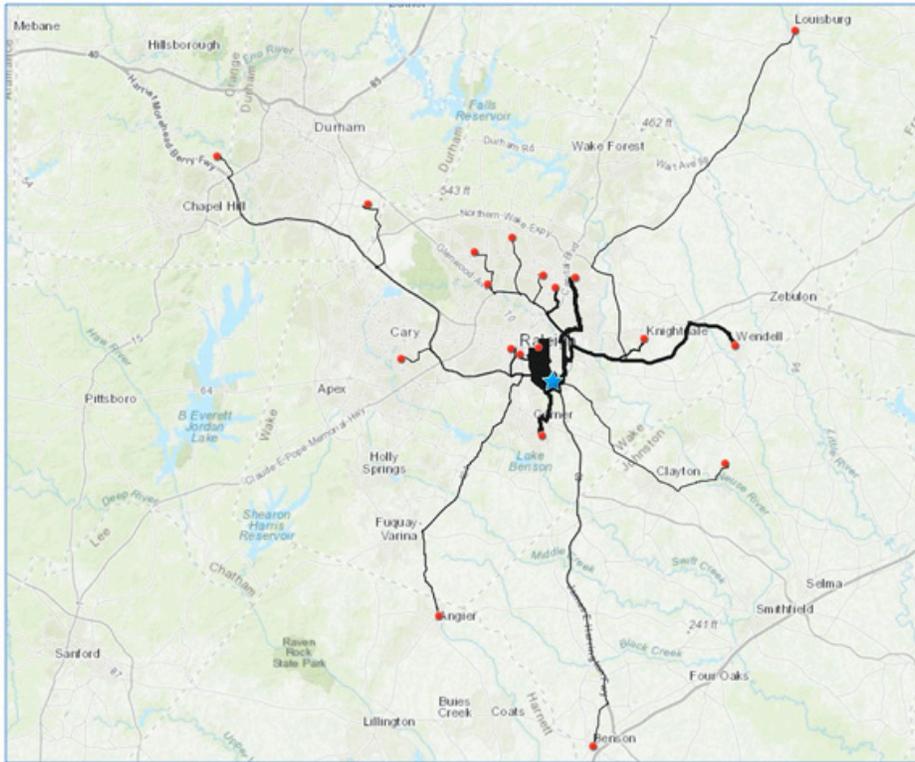


Students who applied for the Opportunity Scholarship and ultimately did not enroll at this school.

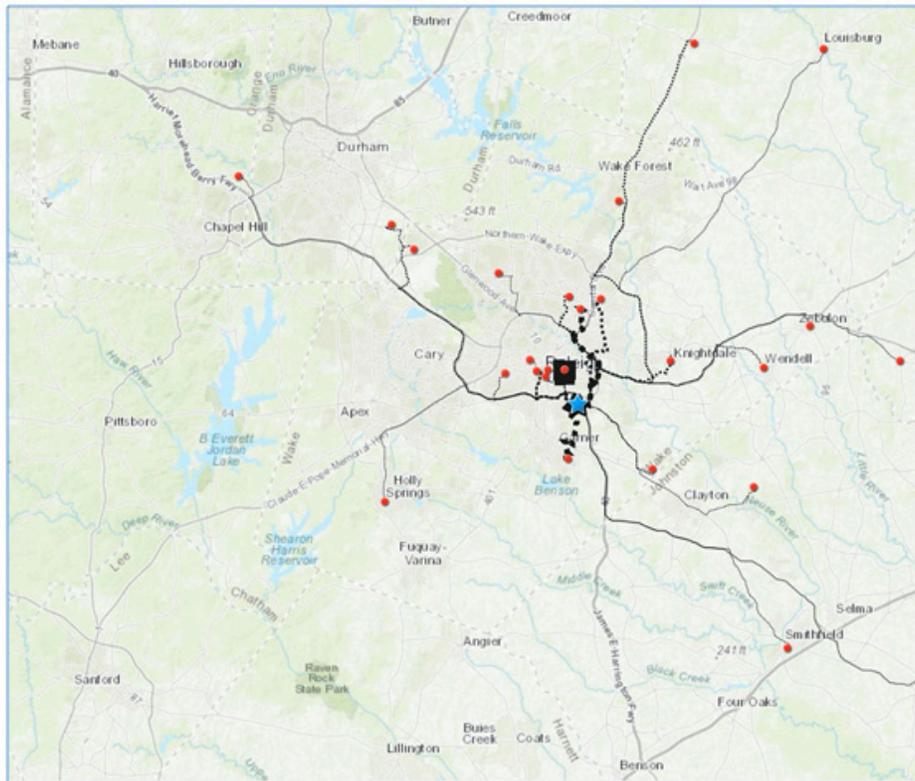
School	Student	Students who Enrolled	Students who did not Enroll
★	●	_____	-----

Line thickness is indicative of the number of students attending a school from a specific zip code. The thicker the line connecting the student dot to the school star, the more students who enrolled/did not enroll in the school from that zip code. Thinner lines indicate fewer students.

#2 Word of God Christian Academy (Raleigh)

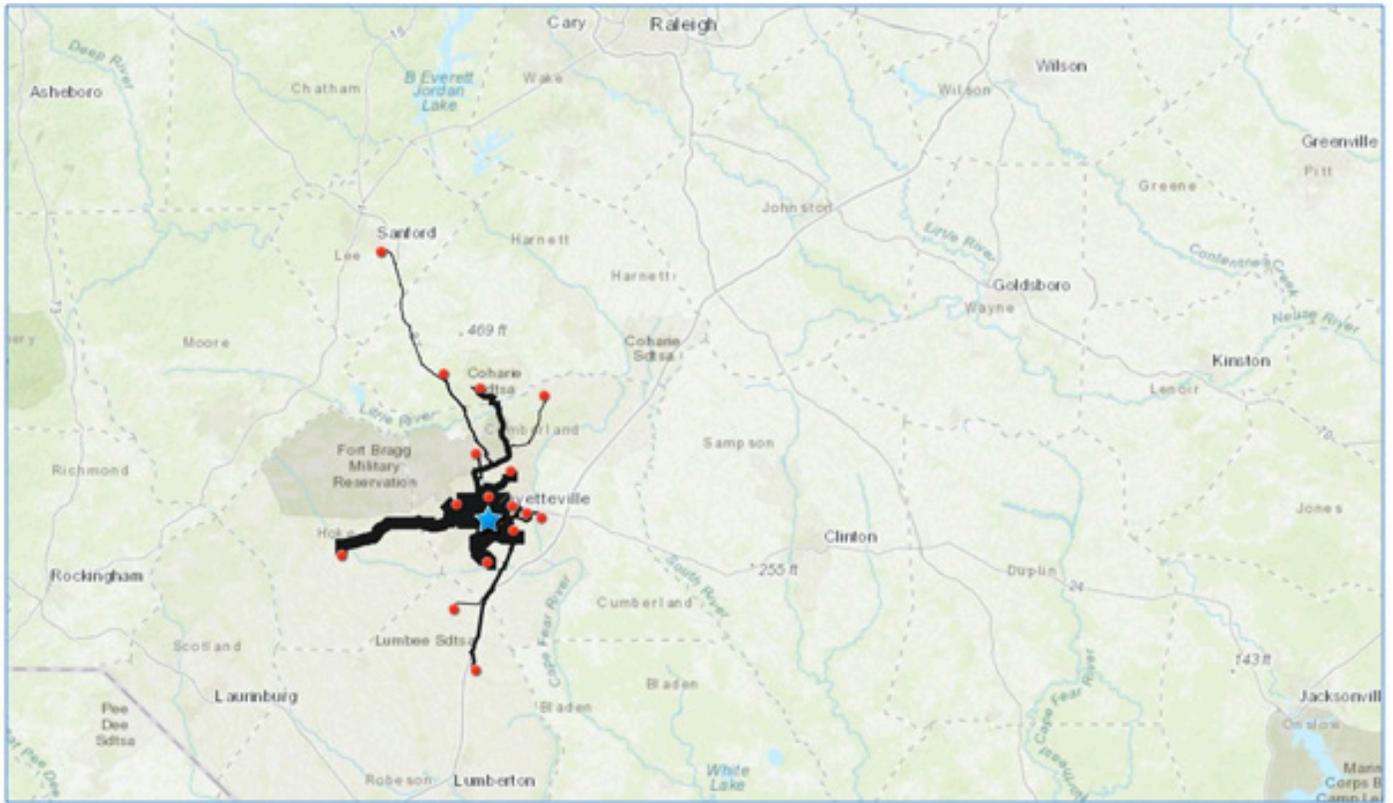


Students who applied for the Opportunity Scholarship and enrolled in their school of choice.

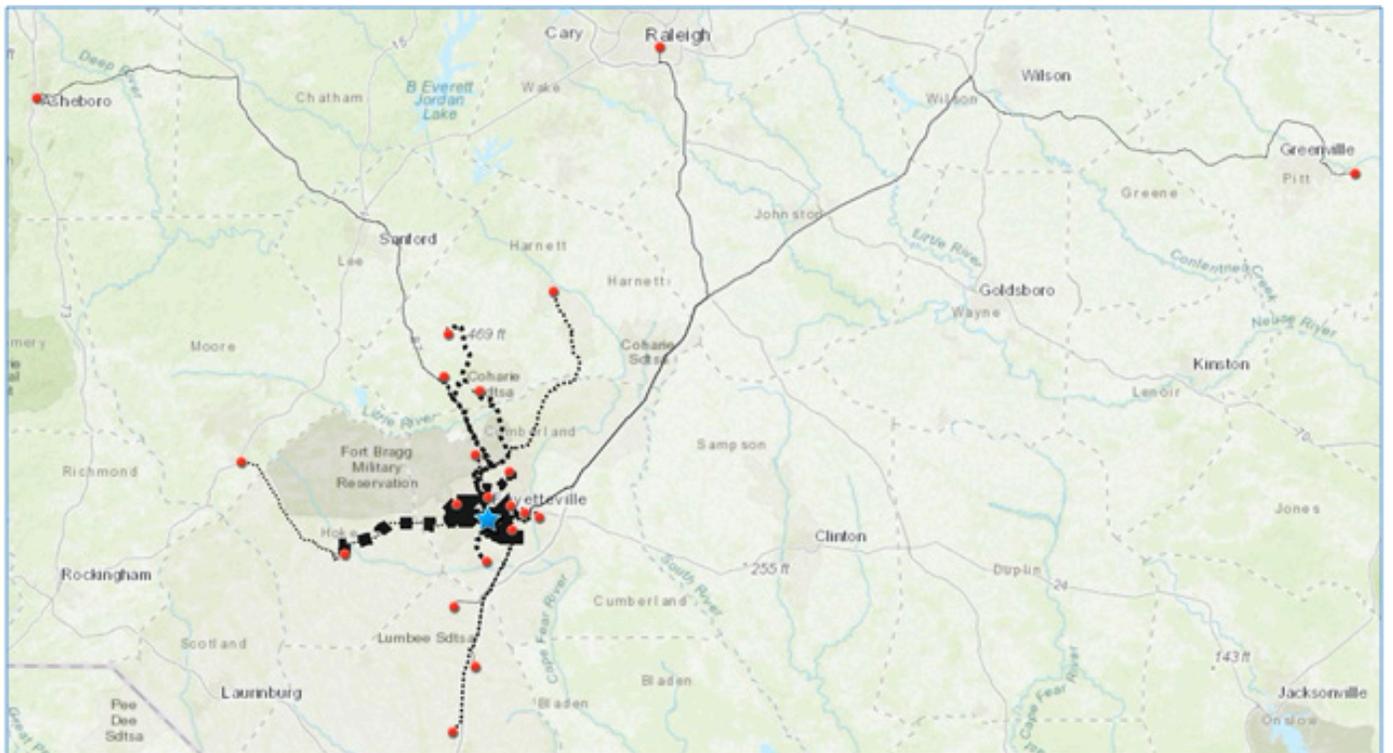


Students who applied for the Opportunity Scholarship and ultimately did not enroll at this school.

#3 Fayetteville Christian School (Fayetteville)

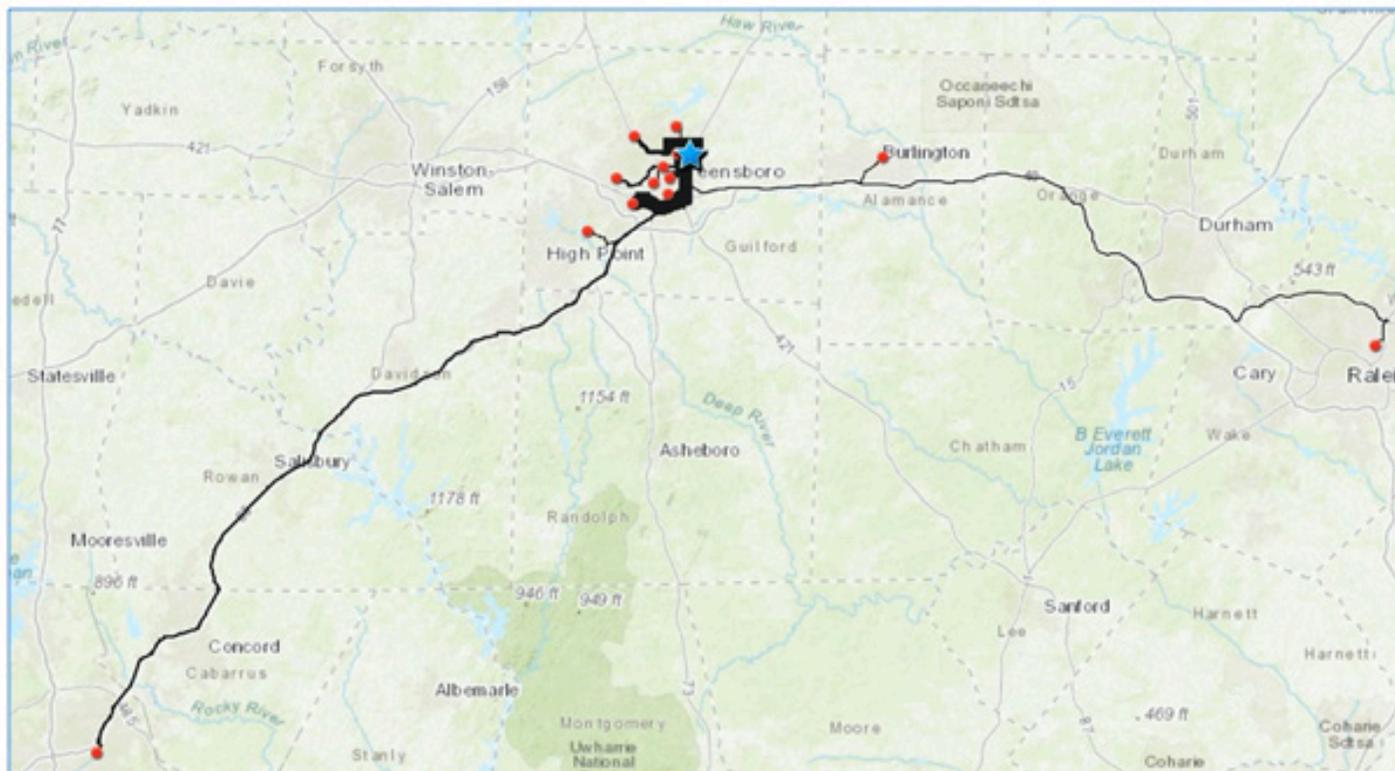


Students who applied for the Opportunity Scholarship and enrolled in their school of choice.

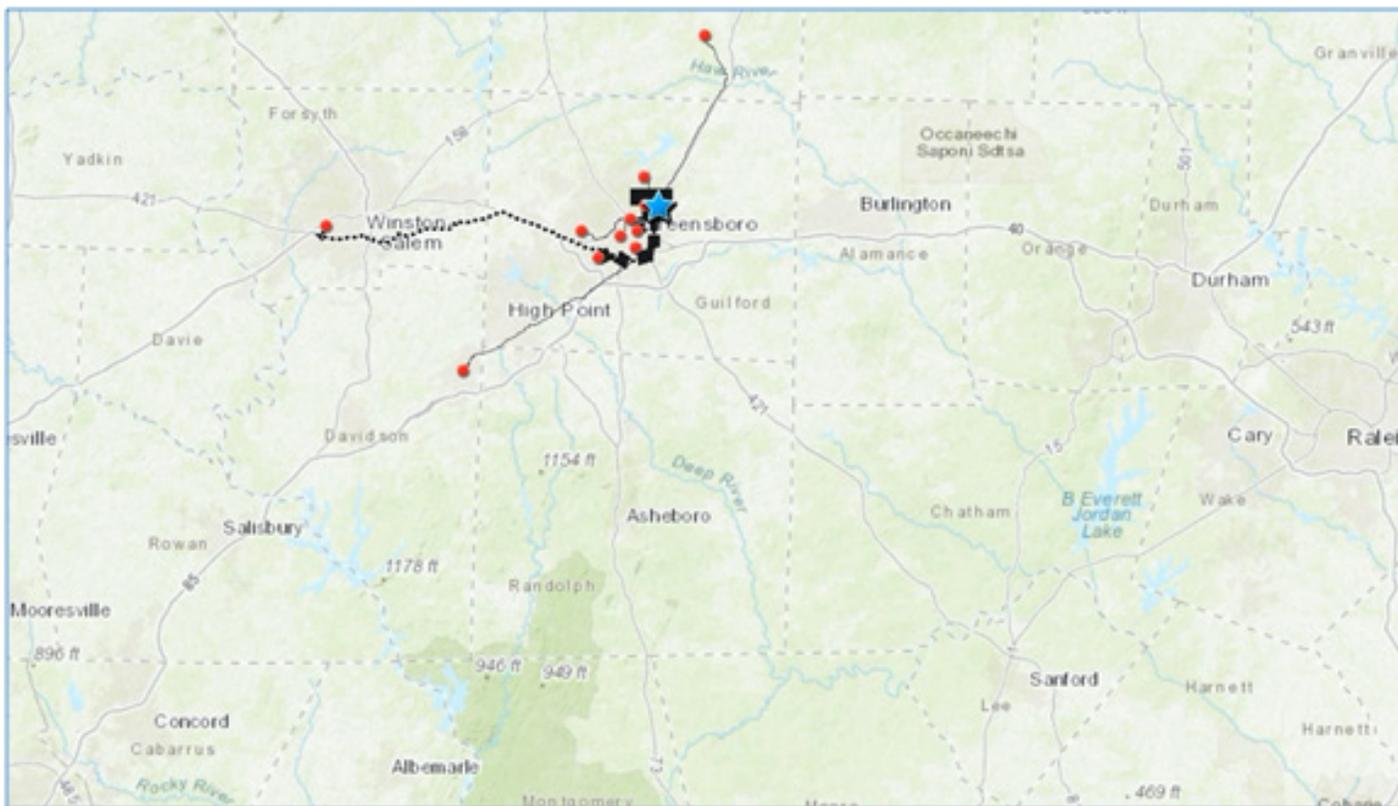


Students who applied for the Opportunity Scholarship and ultimately did not enroll at this school.

#4 Greensboro Islamic Academy (Greensboro)

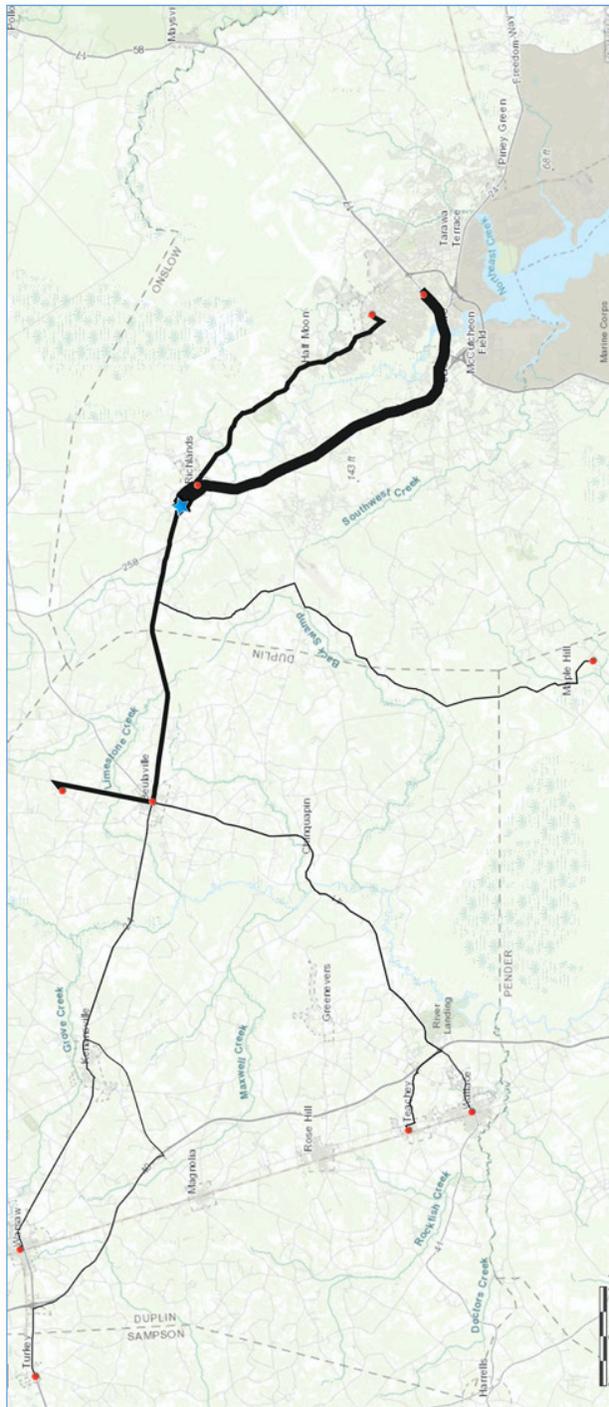


Students who applied for the Opportunity Scholarship and enrolled in their school of choice.

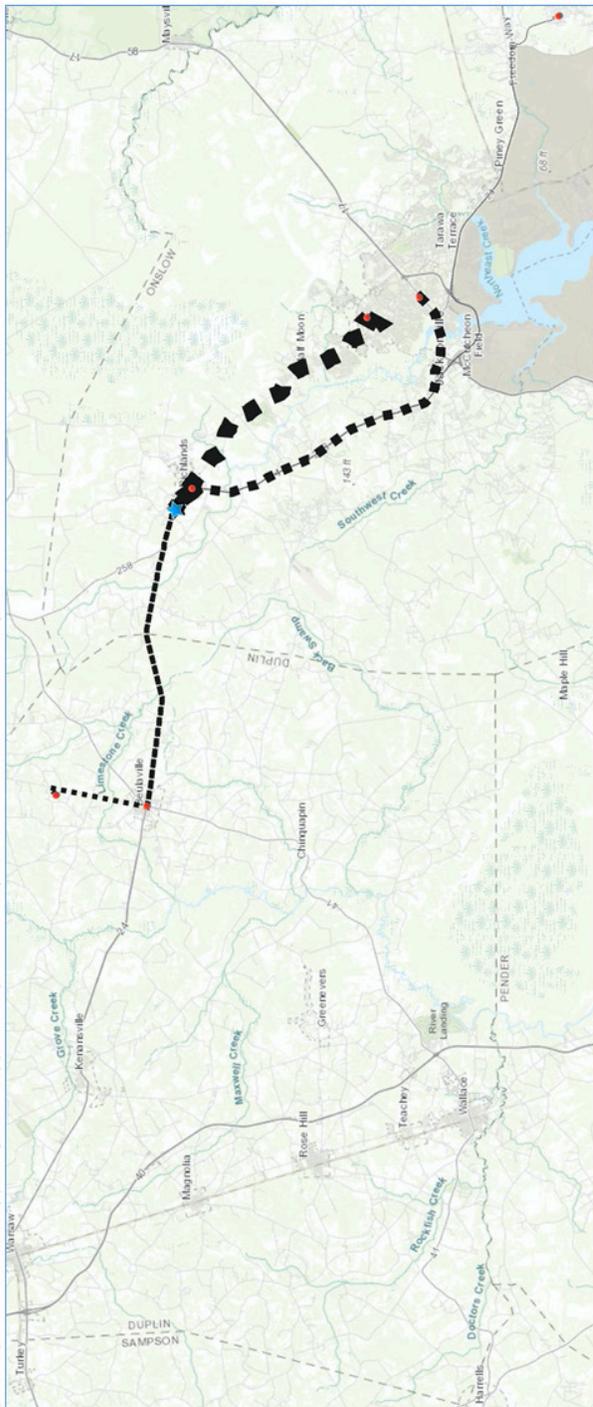


Students who applied for the Opportunity Scholarship and ultimately did not enroll at this school.

#5 Liberty Christian Academy (Richlands)

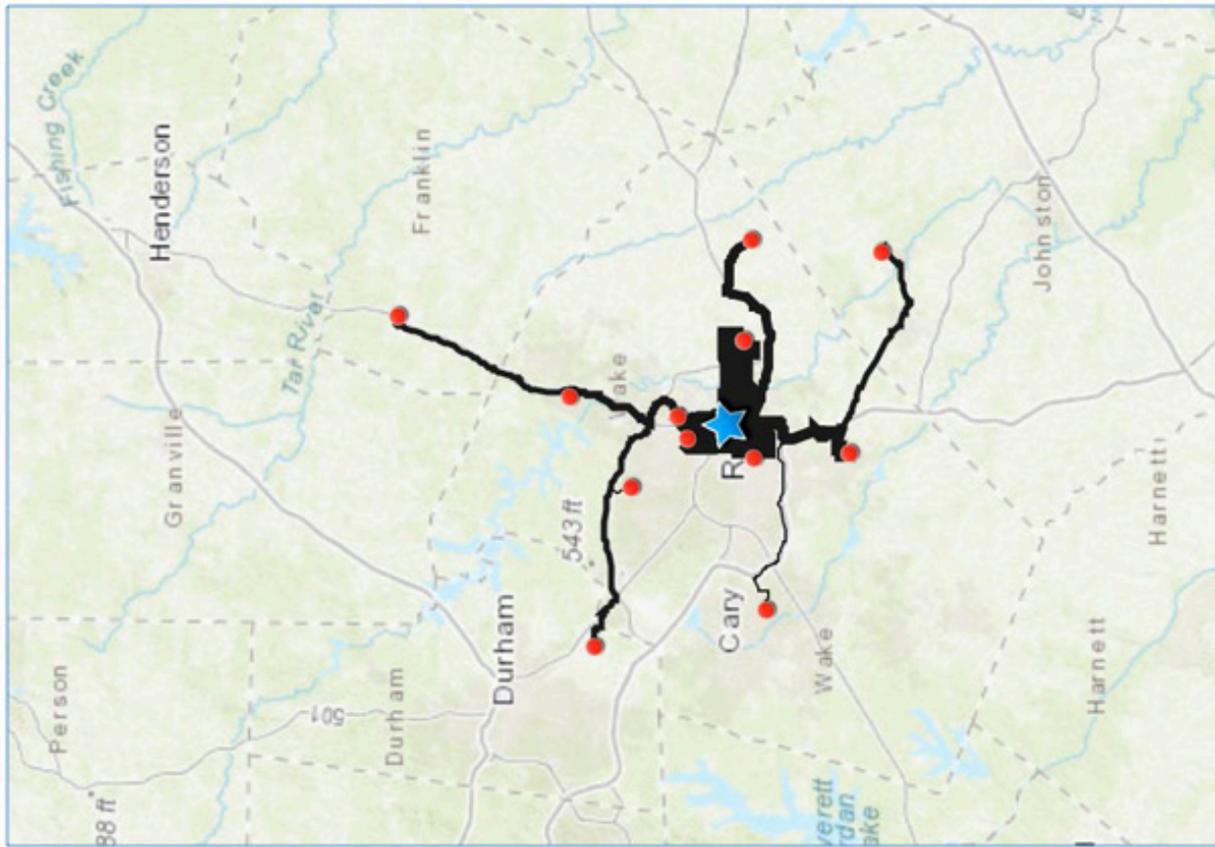


(Above) Students who applied for the Opportunity Scholarship and enrolled in their school of choice.

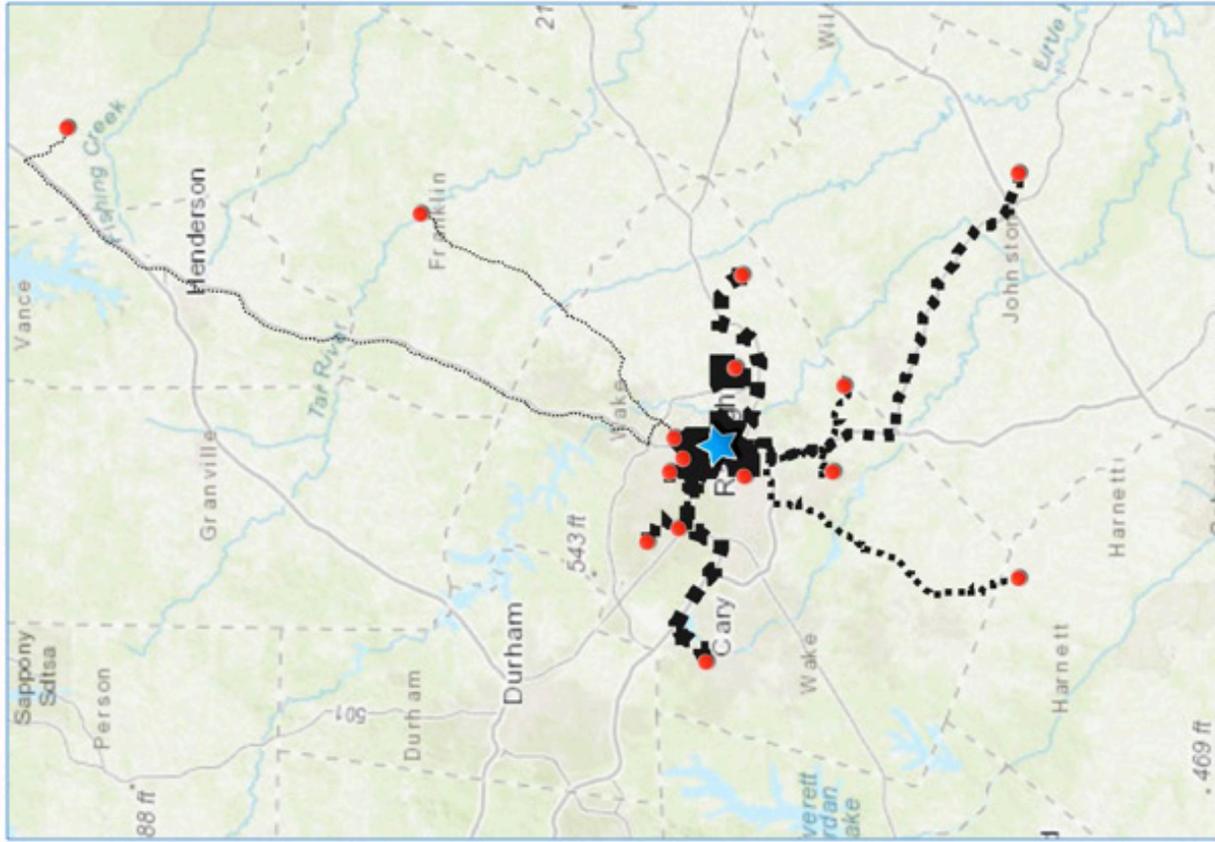


(Above) Students who applied for the Opportunity Scholarship and ultimately did not enroll at this school.

#6 Raleigh Christian Academy (Raleigh)

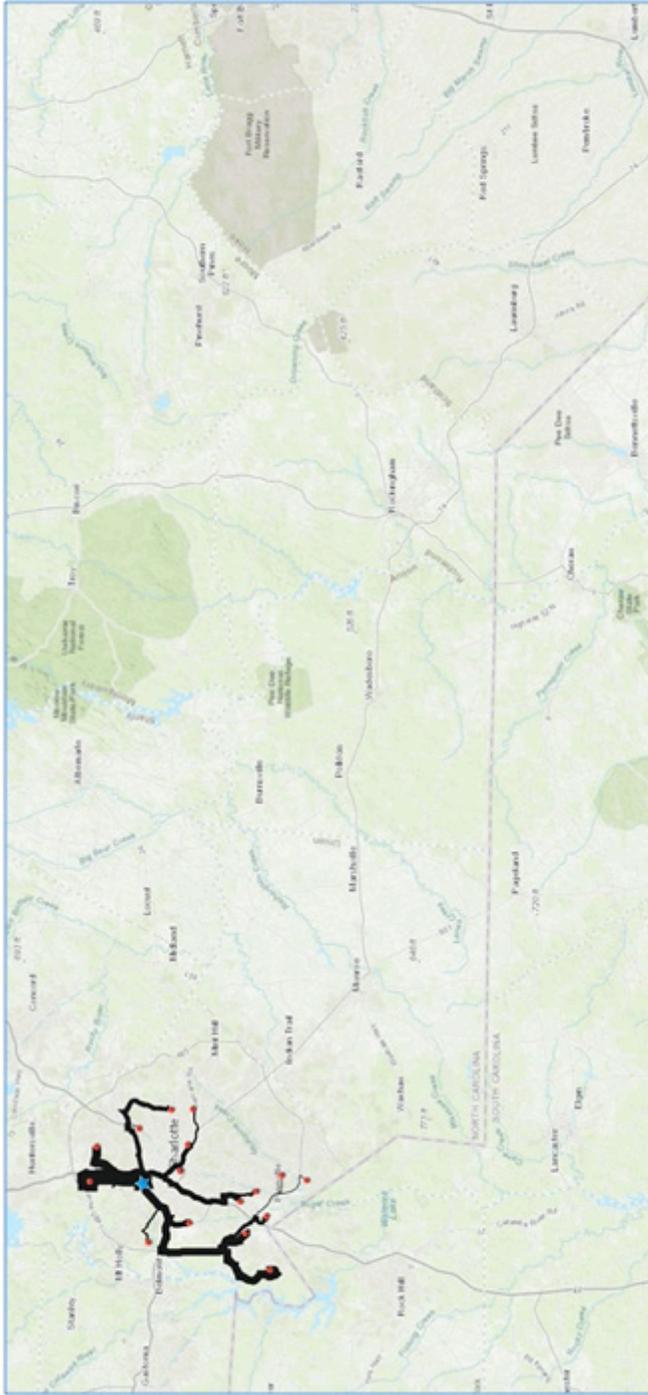


Students who applied for the Opportunity Scholarship and enrolled in their school of choice.

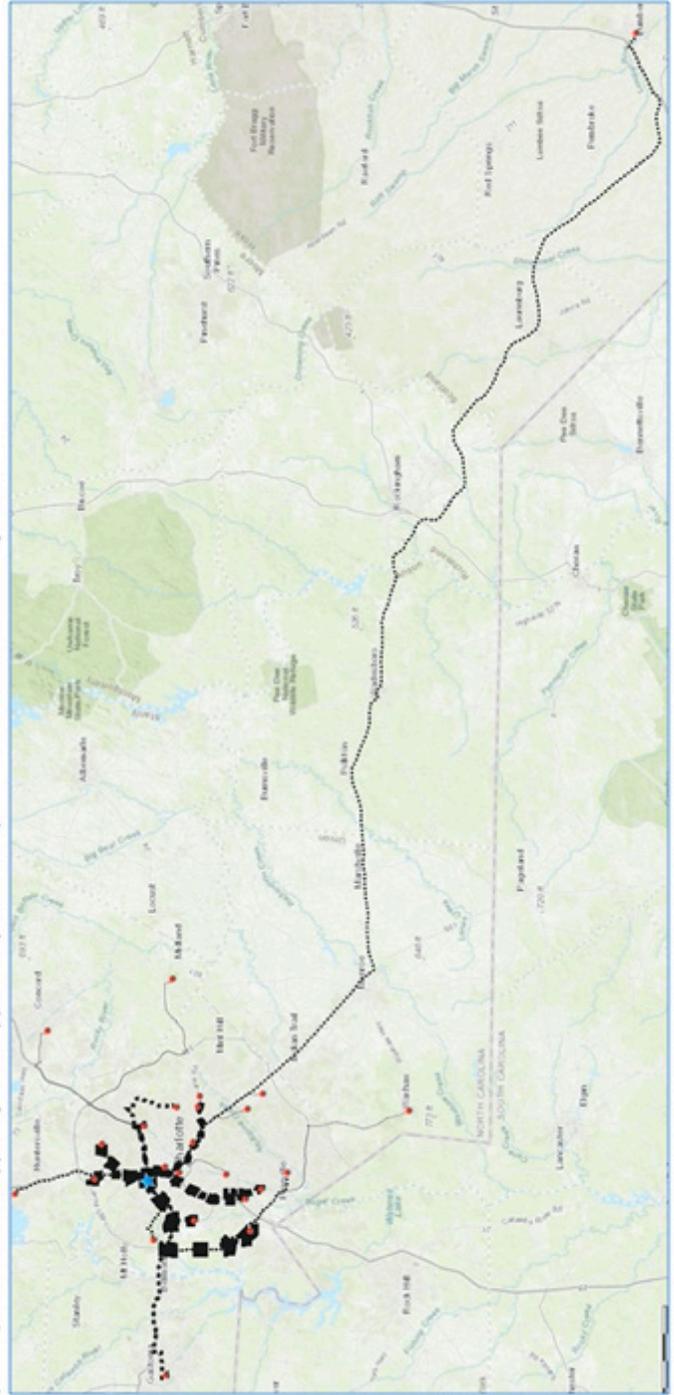


Students who applied for the Opportunity Scholarship and ultimately did not enroll at this school.

#7 Victory Christian Center School (Charlotte)

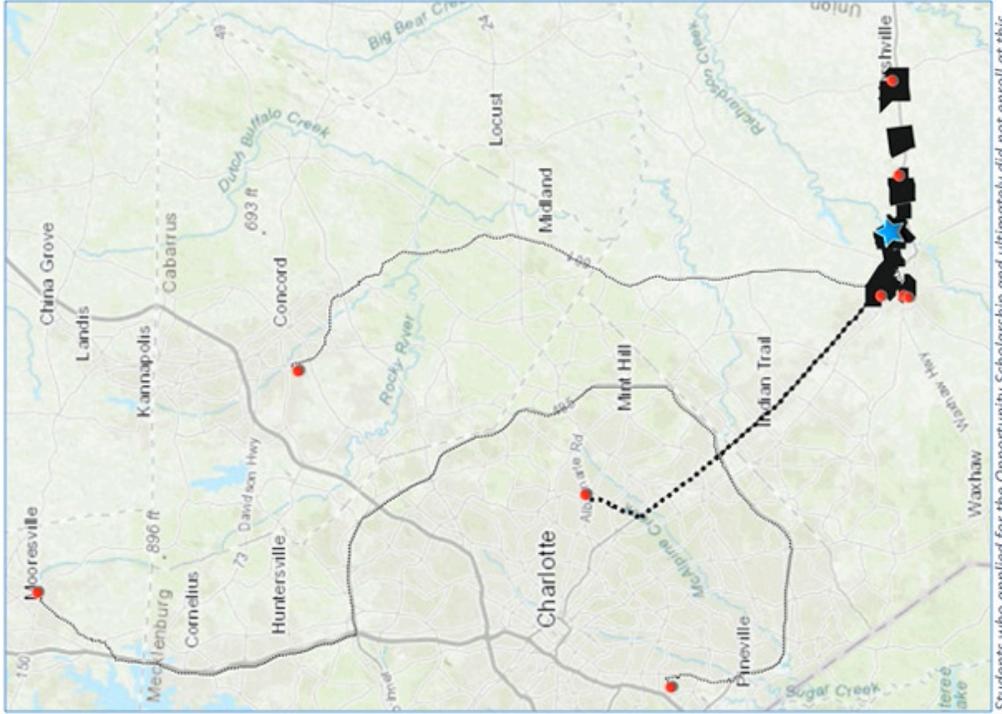
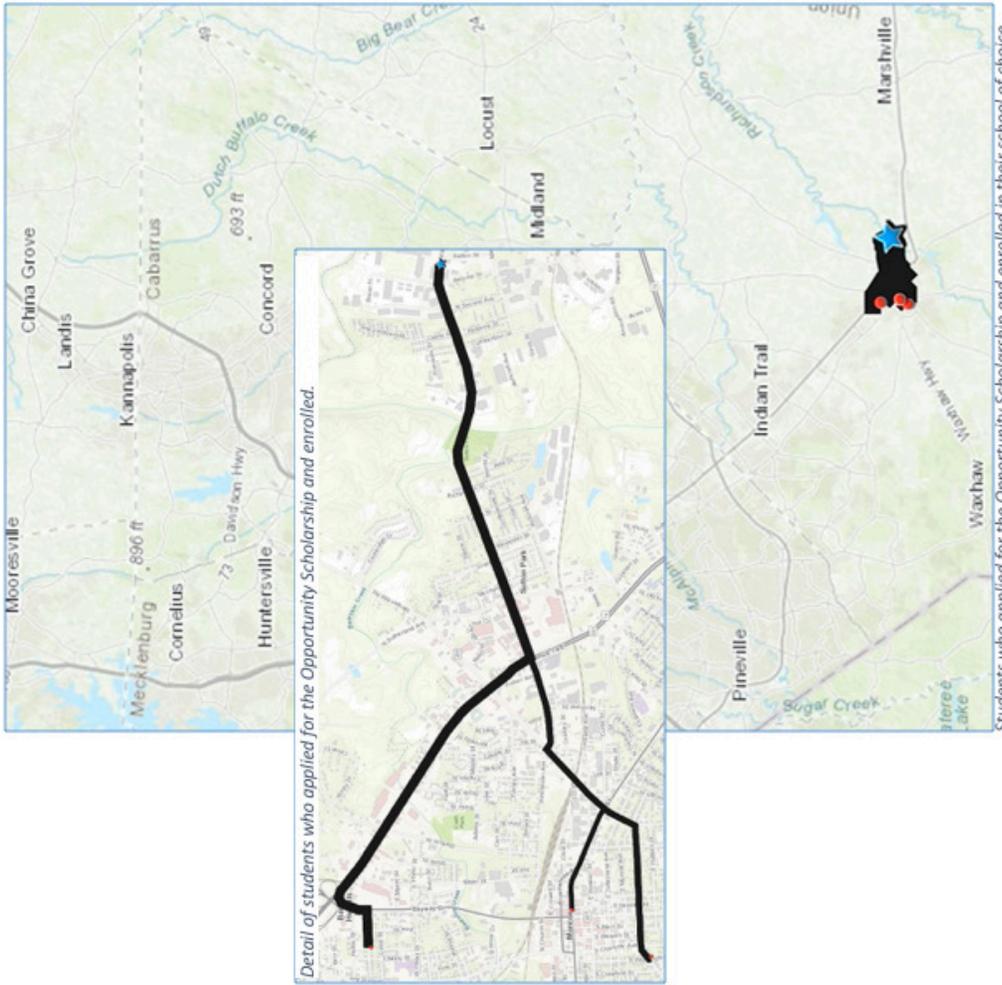


(Above) Students who applied for the Opportunity Scholarship and enrolled in their school of choice.

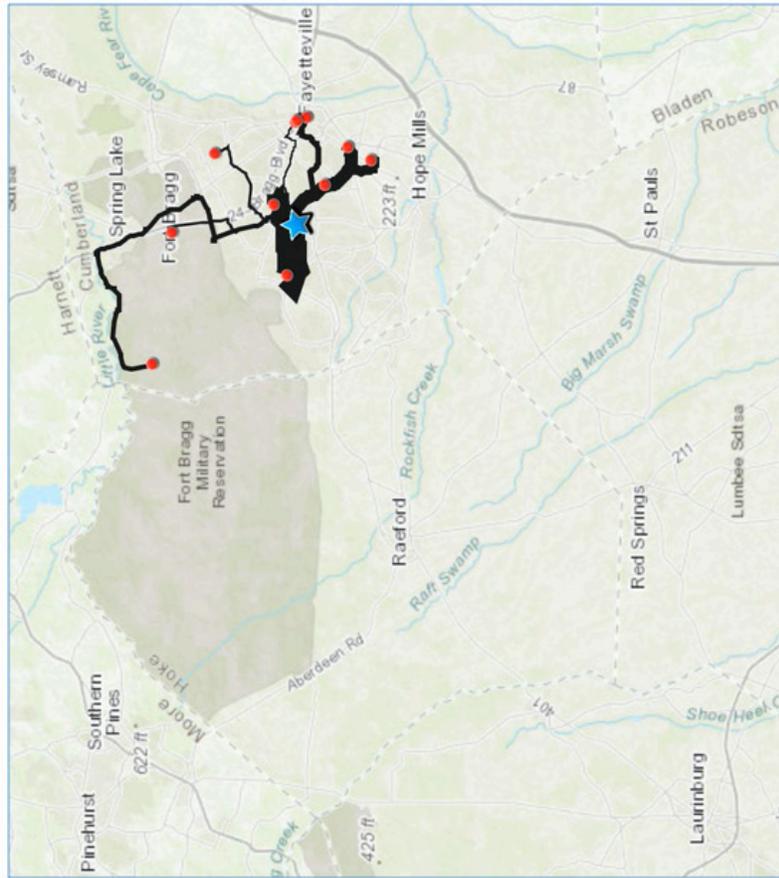


(Above) Students who applied for the Opportunity Scholarship and ultimately did not enroll at this school.

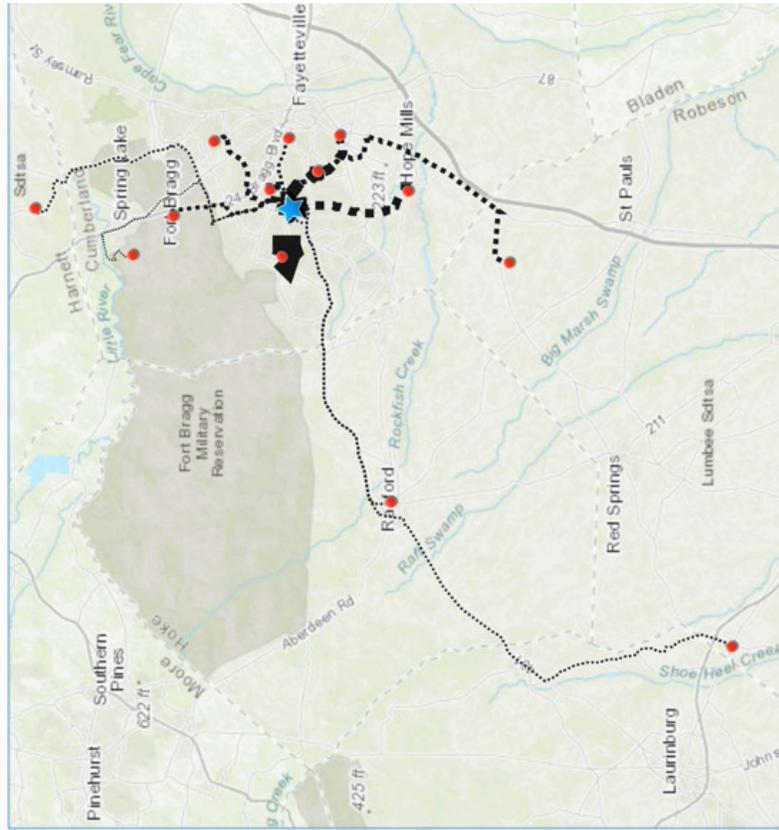
#8 Tabernacle Christian School (Monroe)



#9 Berean Baptist Academy (Fayetteville)

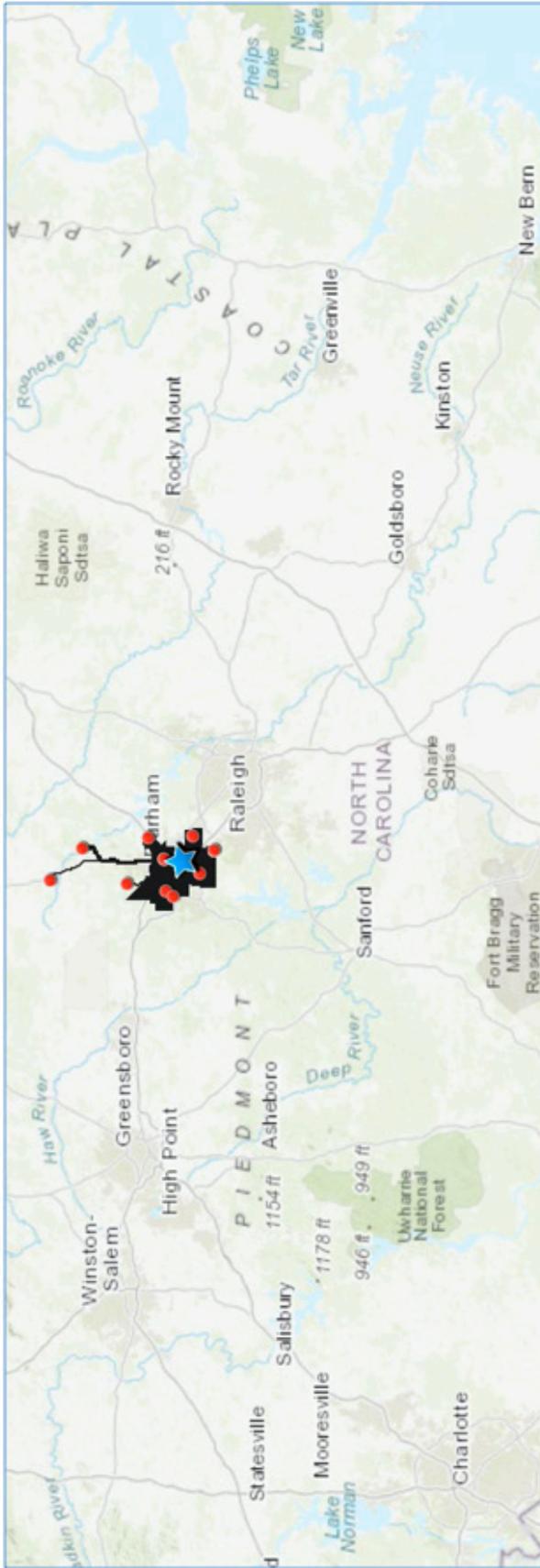


Students who applied for the Opportunity Scholarship and enrolled in their school of choice.

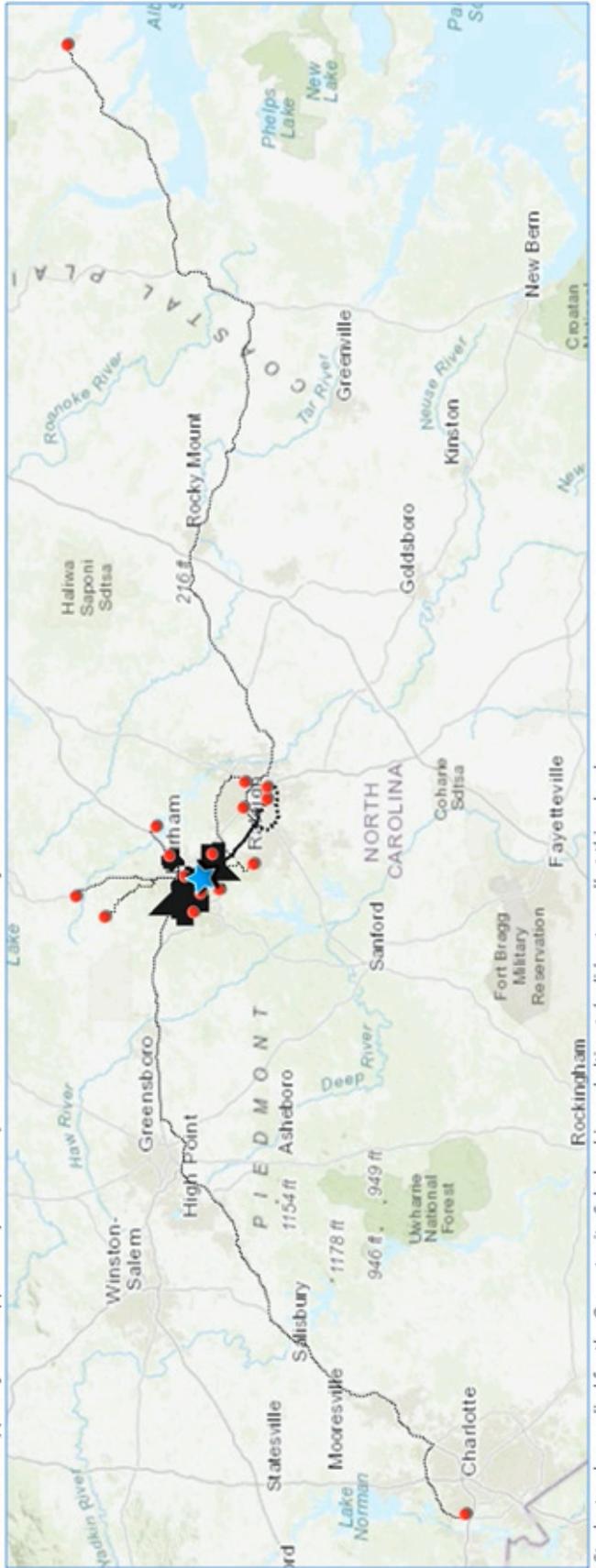


Students who applied for the Opportunity Scholarship and ultimately did not enroll at this school.

#10 Mount Zion Christian Academy (Durham)



Students who applied for the Opportunity Scholarship and enrolled in their school of choice.



Students who applied for the Opportunity Scholarship and ultimately did not enroll at this school.

Finding 3: Testing and Assessments

General regulations regarding testing and assessment in North Carolina private schools require the administration of a nationally standardized test in the areas of English grammar, reading, spelling and mathematics for all students in grades 3, 6, 9 and 11. Although private schools are not required to establish cut scores on these exams for promotion to the next grade level, each individual private school is required to establish a minimum competency score on the grade 11 exam. Student performance on the grade 11 exam is used to determine their eligibility for graduation in grade 12. It is also permissible for private schools to administer the state tests, known as the North Carolina End of Grade (grades 3 through 8) and End of Course (certain high school subjects) exams, but these tests do not meet the definition of a nationally-normed test so they must be used in conjunction with another assessment. The Center for Urban Affairs and Community Services provides access to these test materials through the Non-Public Schools Testing Program, which is sanctioned by the North Carolina Department of Public Instruction and financed by the individual private schools. Finally, it is required by law that all standardized test results be kept on file at the private school for one year after the testing date, for inspection by the DNPE.

Additional testing regulations apply to students who participate in one or more of the three state-funded private school choice programs. State statutes require that private schools participating in the Opportunity Scholarship program administer a nationally normed standardized assessment of their choosing to all scholarship recipients in grades three and higher. Results must be submitted to SEAA by July 15 each year. In the program's early years, test scores were submitted through a variety of media (e.g., by facsimile, email, United States Postal Service, etc.) and in a variety of formats (e.g., summary Excel spreadsheets created by individual schools, PDF files, photographs of PDF files, scanned copies of paper test results, etc.). Furthermore, there was confusion about which specific scores to include (e.g., raw scores, scale scores, grade equivalent scores, stanines, national percentile ranks, etc.). As the program has grown, SEAA guidance on this issue has become more specific.⁶ Today, test scores are only accepted as PDF documents, uploaded via a secure file repository system on SEAA's website, and must include scale scores and national percentile ranks, at a minimum. Legislative changes also have permitted SEAA to hire nine full-time staff to administer the program and to upgrade the technology they use to accept and store electronic documents, which has helped streamline this process. As a result of these changes, approximately \$2 million of the surplus scholarship funds from the 2017-18 school year were spent on technology upgrades (Helms, 2019).

The main reason SEAA collects student test scores is a mandate in the legislation that established the Opportunity Scholarship program to evaluate changes in student achievement associated with the program. However, because a formal program evaluation has never been commissioned by the state, these test scores are not regularly accessed by external evaluators, which means there is little formal understanding about the usability of these data outside of SEAA, creating a potentially serious information gap, as any future evaluation that attempts to rely on extant data will be shaped by the types and formats of scores that have been collected to date and the extent of data missingness. In this section, we describe our efforts to overcome significant challenges in order to analyze those data, which required extensive coordination with SEAA.

⁶ See <http://www.ncseaa.edu/pdf/OPSTestingReportingProcess.pdf>

In the process of extracting, digitizing, organizing, and analyzing the test score data, we learned that many private schools that participate in the Opportunity Scholarship program administer more than one nationally-normed standardized test. Thus, to get a better sense of which tests are most commonly used and which combination of tests are observed most frequently, we created a table (Table 3) that presents a comprehensive list of the tests administered by every private school that submitted test scores in a readable format to SEAA from the first year of the Opportunity Scholarship program to the present day. Schools in this table are grouped by religious affiliation to help identify any patterns that might appear along this dimension.

Ignoring religious affiliation temporarily, the most commonly-used assessment in 2017-18 was the Iowa Test of Basic Skills, used either alone or in conjunction with another assessment. Specifically, 54 percent of private schools in our data fall into this category (labeled A in the Table). The next most popular combination of assessments in 2017-18, used by 24 percent of private schools in our data, was the combination of the Stanford and TerraNova (Category F). Categories D ("Other") and G ("TerraNova, TerraNova + Other") came in at ten percent each. Finally, only about two percent of schools used a combination of the Iowa Test and TerraNova (Category C).

There also are some interesting patterns to observe by religious affiliation. For example, among the Roman Catholic schools that participate in the Opportunity Scholarship program, the Iowa Test is the most popular, used in all but two schools. This particular assessment also is popular among the nonsectarian schools. In contrast, the Islamic schools in Durham and Raleigh rely on the TerraNova assessment, where it was the most commonly used assessment in 2017-18. Finally, the combination of the Stanford and TerraNova tests is commonly observed among Protestant schools.

It is also interesting to examine individual private schools to look for changes in their preferred test over time. Changes might reflect reactions to test publishers' pricing changes, new school leadership, or attempts to find an assessment that better aligns with the private school curriculum. It also may be the case that schools are responding to the perceived scrutiny that comes with having to submit student-level test scores for scholarship recipients to an external agency. In practice, however, most schools turn out to be remarkably consistent in their choice of assessment over the years examined. Some exceptions include the Piedmont School in High Point, which changed from Category G ("TerraNova, TerraNova + Other") in 2016-17 to Category A in 2017-18 ("Iowa Test, Iowa Test + Other") and the Christian Faith Center Academy in Creedmoor, which changed from Category D ("Other") in 2016-17 to Category F (Stanford/TerraNova) in 2017-18.

Table 3. Comprehensive list of the standardized tests administered, by OS-participating private school, 2014-15 through 2017-18
(See Note at bottom of table for Key)

Religious Affiliation	School (Location)	2014-15	2015-16	2016-17	2017-18
Islamic	Al-Huda Academy (Durham)			G	G
	Al-Iman School (Raleigh)		G	G	G
	Charlotte Islamic Academy (Harrisburg)				F
	Greensboro Islamic Academy (Greensboro)	A	A	A	A
Nonsectarian	Albemarle School (Elizabeth City)				F
	First Impressions Academy (Fayetteville)				F
	Fletcher Academy (Raleigh)			A	A
	Highlander Academy (Red Springs)			F	F
	Impact Journey School (Greensboro)				F
	Lionheart Academy of the Triad (Greensboro)			G	G
	Noble Academy (Greensboro)			G	G
	Piedmont School (High Point)			G	A
	Thales Academy of Knightdale (Knightdale)				A
	Thales Academy of Raleigh (Raleigh)				A
	The Trilogy School of Raleigh (Raleigh)			A	
	Wayne Country Day School (Goldsboro)			A	A
Protestant	Alamance Christian School (Graham)		F	F	F
	Bailey's Grove Baptist School (Asheboro)			A	A
	Bal-Perazim Christian Academy (Fayetteville)		F	F	F
	Berean Baptist Academy (Fayetteville)		A	A	A
	Bethel Christian Academy (Kinston)		A	A	A
	Bethel Christian Academy (Spruce Pine)		A	A	A
	Bible Baptist Christian School (Matthews)		A	A	A
	Brookstone Schools (Charlotte)		A	A	A
	Calvary Christian School (King)				A
	Calvary Christian School (Wilmington)				A
	Calvary Day School (Winston-Salem)				F
	Cape Fear Christian Academy (Erwin)				C
	Cape Fear Christian School (Fayetteville)				G
	Carolina Baptist Academy (Reidsville)				A
	Christian Faith Center Academy (Creedmoor)			D	F
	Columbus Christian Academy (Whiteville)			D	D
	Community Baptist School (Reidsville)		F	F	
	Community Christian Academy (Bessemer City)				A
	Concord First Assembly Academy (Concord)	F	F	F	F
	Cornerstone Christian Academy (Fayetteville)			A	A
	Cornerstone Christian Academy (Statesville)		E	A	A
	Cramerton Christian Academy (Cramerton)			A	A
	Destiny Now Academy (Fayetteville)				D
	Dream Big Christian Academy K-12 (Dunn)		A	A	
	Faith Assembly Christian Academy (Durham)			D	D

Religious Affiliation	School (Location)	2014-15	2015-16	2016-17	2017-18
	Faith Christian Academy (Goldsboro)			A	A
	Faith Christian School (Ramseur)			A	A
	Fayetteville Christian School (Fayetteville)	F	F	F	
	Fayetteville Street Christian School (Asheboro)				A
	First Wesleyan Christian School (Gastonia)		F	F	F
	Flaming Sword Christian Academy (Fayetteville)				A
	Flaming Sword Christian Academy (Hope Mills)			A	
	Freedom Christian Academy (Fayetteville)	F	F	F	F
	Friendship Christian School (Raleigh)			A	A
	Gaston Christian School (Gastonia)				G
	Gospel Light Christian School (Winston-Salem)		A	A	A
	Grace Christian School (Sanford)				D
	Hickory Grove Christian School (Charlotte)				A
	High Point Christian Academy (High Point)		F	F	F
	Hilltop Christian School (Fuquay-Varina)			A	
	Jacksonville Christian Academy (Jacksonville)			A	A
	Liberty Academy (Richlands)		F	F	F
	Liberty Christian School (Durham)				D
	Living Water Christian School (Jacksonville)		D	D	D
	Mount Zion Christian Academy (Durham)		G	B	A
	Mountain Island Day School (Charlotte)			A	A
	Nebo Crossing Academy (Nebo)			A	A
	New Life Christian Acad. & Prep. Sch. (Fayetteville)			F	
	North Raleigh Christian Academy (Raleigh)			F	
	Northeast Academy (Lasker)				F
	Northside Christian Academy (Charlotte)			F	G
	Northwood Temple Academy (Fayetteville)			F	
	Raleigh Christian Academy (Raleigh)		A	A	A
	Riverside Christian Academy (Fayetteville)				G
	Rockwell Christian School (Rockwell)		A	A	A
	Salem Baptist Christian School (Winston-Salem)		F	F	
	Shining Light Academy (Greensboro)			A	A
	Shining Light Baptist Academy (Monroe)			F	F
	Southeastern Christian Academy (Shallotte)				F
	Star Christian Academy (Smithfield)		G	G	A
	Tabernacle Christian School (Hickory)			A	A
	Tabernacle Christian School (Monroe)		A	A	A
	Temple Baptist School (Asheville)			A	A
	The Master's Academy (Forest City)			D	D
	Tri-City Christian Academy (High Point)		A	A	A
	Trinity Christian School (Fayetteville)		A	A	A
	Trinity Christian School (Rutherfordton)			A	A

Religious Affiliation	School (Location)	2014-15	2015-16	2016-17	2017-18
	Union Grove Christian School (Lexington)				A
	United Faith Christian Academy (Charlotte)				F
	Unity Christian Academy (Chocowinity)			A	A
	Vandalia Christian School (Greensboro)			A	A
	Victory Christian Academy (Gastonia)		G	G	G
	Victory Christian Center School (Charlotte)	F	F	F	C
	Wake Christian Academy (Raleigh)				A
	Wayne Christian School (Goldsboro)				F
	Wesleyan Christian Academy (High Point)			F	F
	Winston-Salem Christian School (Winston-Salem)		F	F	F
	Woodland Baptist Christian School (Winston-Salem)			A	A
	Word of God Christian Academy (Raleigh)	F	F	F	F
Roman Catholic	Blessed Sacrament Catholic School (Burlington)				A
	Immaculata Catholic School (Hendersonville)			D	D
	Infant of Prague Catholic School (Jacksonville)			A	A
	Our Lady of Grace Catholic School (Greensboro)				D
	St. Ann Catholic School (Fayetteville)			A	A
	St. Catherine of Siena Catholic School (Wake Forest)			A	A
	St. Mary Catholic School (Wilmington)			A	A
	St. Raphael's Catholic School (Raleigh)		A	A	A

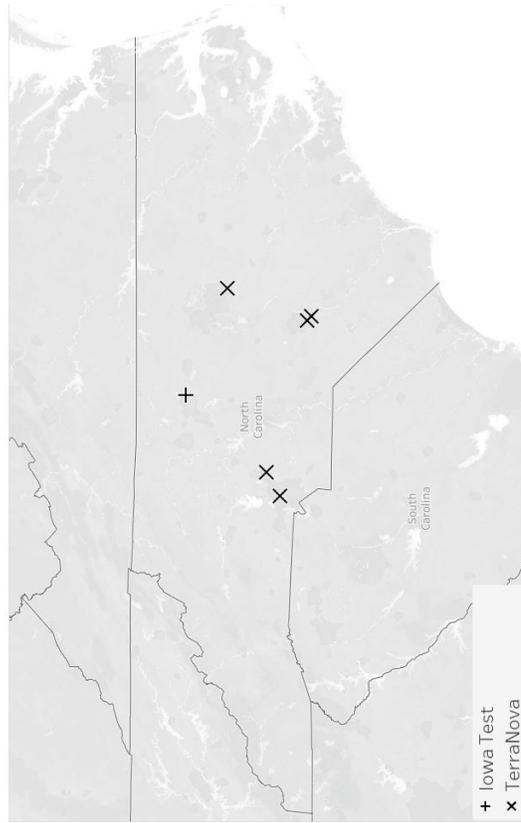
Notes: Key: (A) Iowa Test, Iowa Test + Other; (B) Iowa Test/Stanford; (C) Iowa Test/TerraNova; (D) Other; (E) Stanford; (F) Stanford/TerraNova; (G) TerraNova, TerraNova + Other

It may also be the case that there are geographical patterns in test usage. To help the reader visualize these data, we created maps for each of the four years under examination, 2014-15 to 2017-18, showing which tests were used where in the state (Figure 7). Over this time period, the Iowa Test clearly emerges as a dominant assessment choice, used throughout all regions of the state.

Figure 7. Tests administered by private schools participating in the Opportunity Scholarship program, 2014-15 to 2017-18.

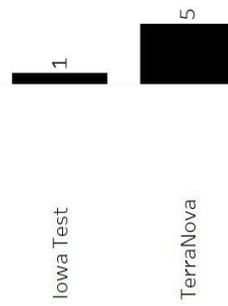
2014-15

Test(s) Administered by Each School



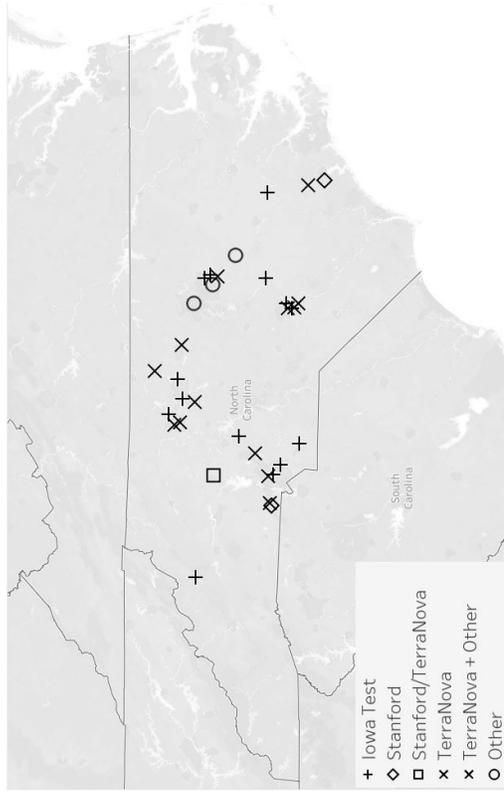
+ lowa Test
x TerraNova

Number of Schools Administering Each Test



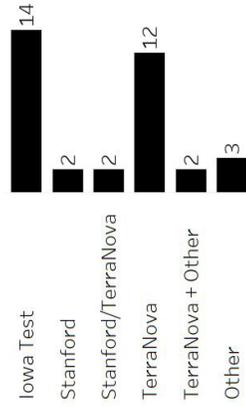
2015-2016

Test(s) Administered by Each School



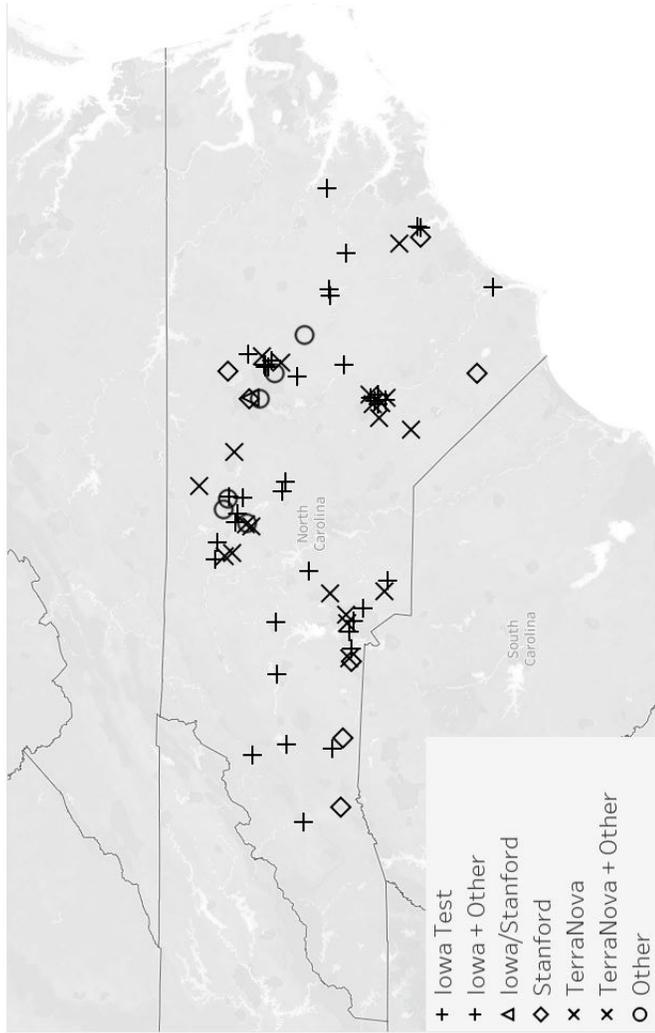
+ lowa Test
◇ Stanford
□ Stanford/TerraNova
x TerraNova
✕ TerraNova + Other
○ Other

Number of Schools Administering Each Test

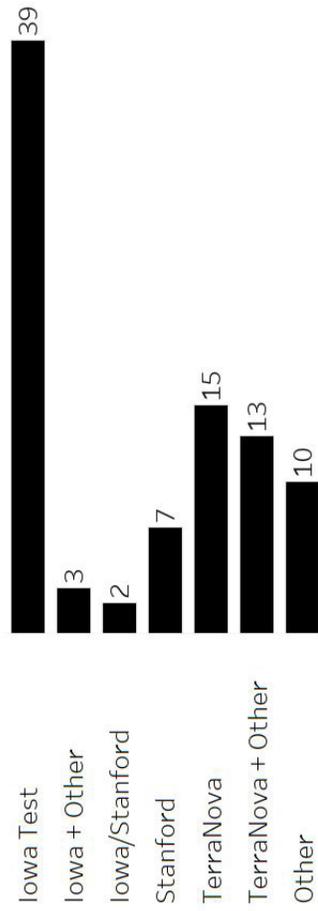


2016-17

Test(s) Administered by Each School

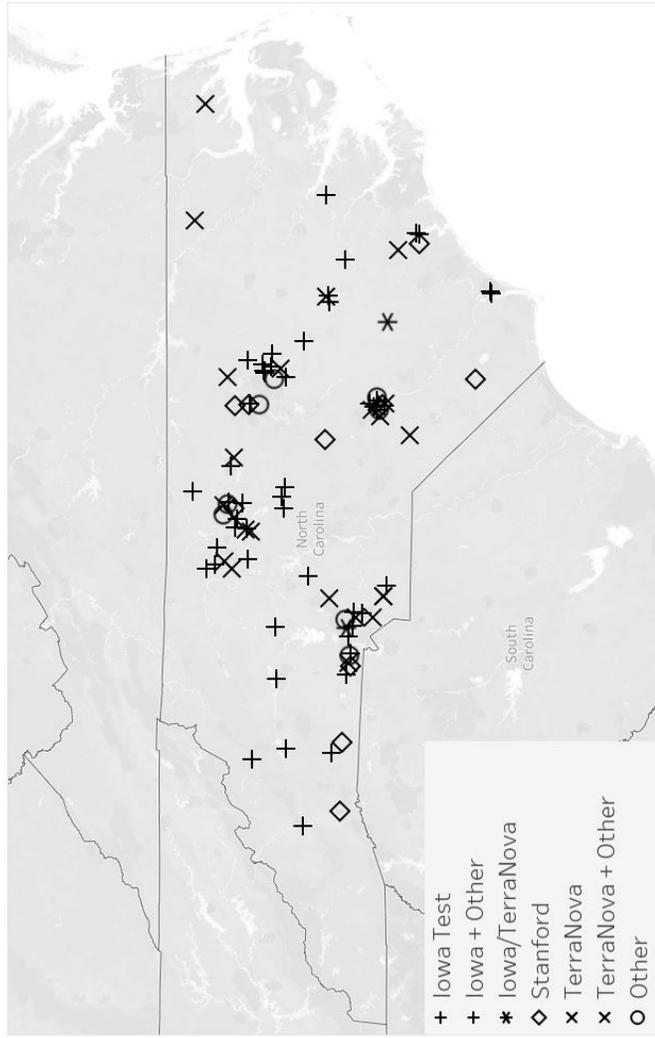


Number of Schools Administering Each Test

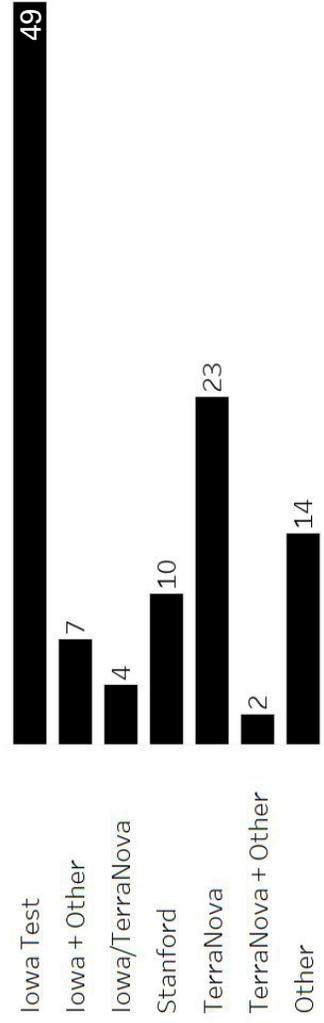


2017-18

Test(s) Administered by Each School



Number of Schools Administering Each Test



Finding 4: Private School Tuition

Unfortunately, DNPE does not maintain a database of private school tuition, but the agency that administers North Carolina's three state-funded, private school choice programs, SEAA, accepts tuition documentation from private schools that upload this information. Data are stored in a variety of formats, some unreadable and some incomplete. Nevertheless, we mined the documentation held by SEAA for the 2016-17 school year and successfully extracted, digitized, and analyzed data on tuition and fees for 374 unique private schools. We believe this is the most comprehensive database of private school tuition that has been assembled to date in North Carolina, even though it suffers from non-trivial missing data. In the 2016-17 school year, the median tuition charged in North Carolina private schools was \$5,483. The minimum tuition value was \$2,025 and the maximum tuition value was \$27,500. Figure 8 displays this information as a histogram.

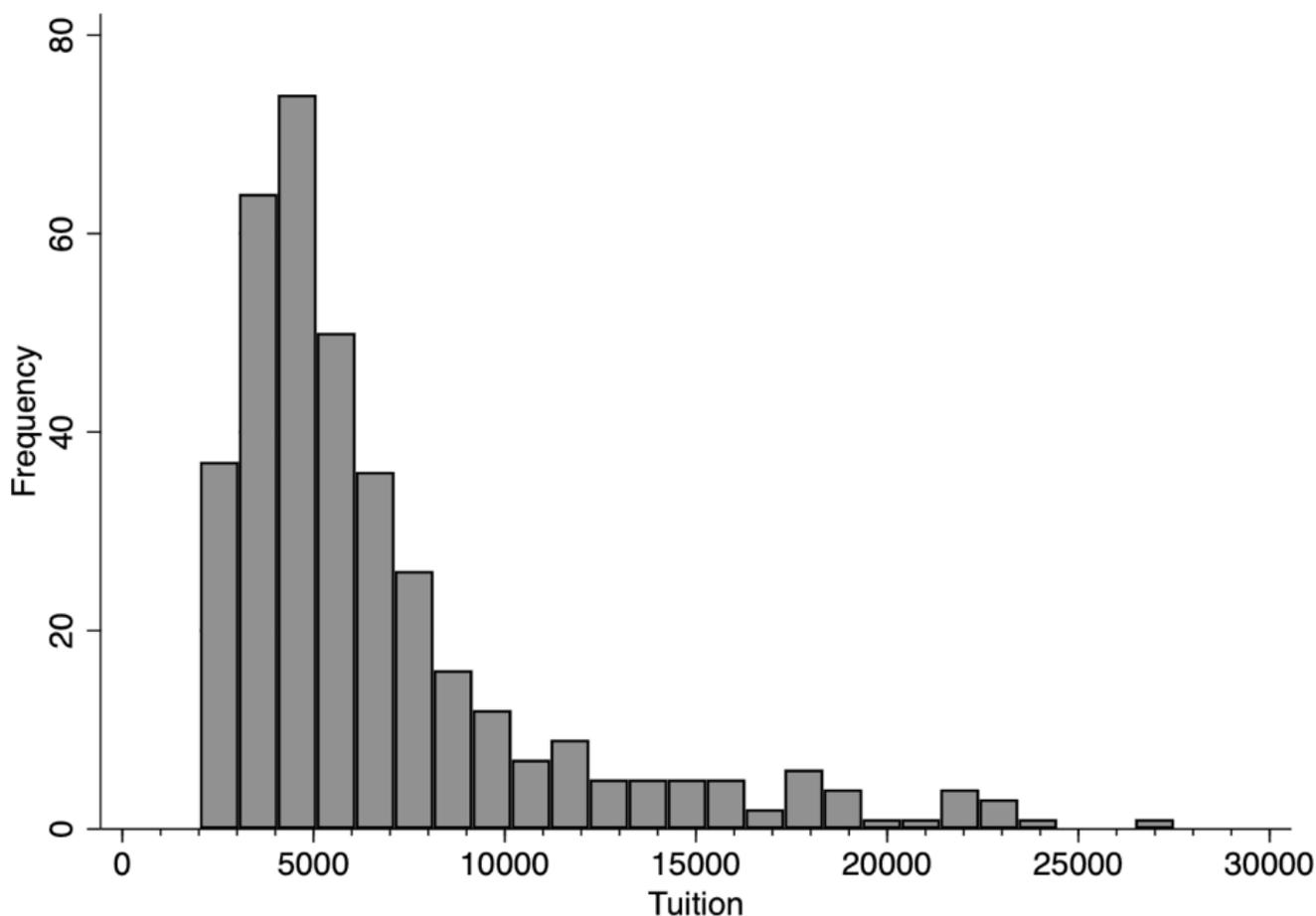


Figure 8. Histogram of Private School Tuition, 2016-2017

We also created a table of tuition prices for the private schools that received the greatest number of voucher recipients through the state's Opportunity Scholarship program in 2016-17 (Table 4). As judged by this criterion, the top five most popular schools that year were Trinity Christian School (Fayetteville), Word of God Christian Academy (Raleigh), Fayetteville Christian School (Fayetteville), Greensboro Islamic Academy (Greensboro), and Liberty Christian Academy (Richlands). The school with the highest base tuition was Word of God Christian Academy, at \$6,317. In contrast, the school with the lowest tuition was Fayetteville Christian School, at \$3,407. We do not have data on any additional scholarships schools may offer to defray costs.

Table 4. Tuition at Private Schools with the Greatest Number of Opportunity Scholarship Recipients Enrolled in 2016-17

#	School Name	City	OS Recipients	Tuition
1	Trinity Christian School	Fayetteville	170	\$5,453
2	Word of God Christian Academy	Raleigh	131	\$6,317
3	Fayetteville Christian School	Fayetteville	126	\$3,407
4	Greensboro Islamic Academy	Greensboro	112	\$4,000
5	Liberty Christian Academy	Richlands	96	\$4,200

Source: SEAA

Recommendations

In this section, we offer recommendations to improve the quality and accessibility of data on North Carolina's private schools. These recommendations range from minor procedural tweaks to substantive changes to the ways in which data are collected, stored, and shared with state agencies, public officials, researchers, and the general public. Many of these suggestions can be accommodated without infringing upon private school autonomy or restricting their freedom over curriculum, testing, operations, admissions, or other dimensions of the private school experience.

Recommendations to Improve Private School Identification

- Our primary recommendation in this area is to adopt a single private school identification number that would be assigned by DNPE at the time a new private school registers with the state and then is shared with other agencies, as well as the general public. DNPE should record these school identification numbers in all private school files, and those numbers should be unique and consistent across time. Doing so will minimize confusion in such common situations as when multiple private schools share the same name, or when a single private school changes its name or address. It also would allow the public, policy makers, and researchers to track a single school over time to see how many years they have been in operation, and it would permit the integration of records held by different state agencies, such as SEAA and DNPE, or by private school associations, which may be interested in tracking information on schools in their network over time.

Recommendations to Improve Data Collection by DNPE

- Schools do not currently report total school enrollment. Instead, schools report the number of enrollees by grade and gender, but not overall. Doing so would provide a useful check that the numbers by grade sum correctly.
- DNPE currently does not make available the data they collect on private schools they visit in person in a given year. Furthermore, the private schools that received a visit are not required to submit the typical annual data collection form that all other private schools in the state submit, creating significant and avoidable holes in longitudinal databases. Given the low cost of requiring schools to submit this minimal amount of information, we recommend revising this policy so that every private school submits the same data to DNPE every year, regardless of whether they received an in-person visit that year or not.
- Rather than overwriting DNPE's private school database every year, archival records should be maintained. Doing so would minimize the duplication of effort that is currently required in order to recreate the spreadsheet that was used to summarize data for prior years' annual reports. Other related suggestions include switching to electronic data collection and storage so that individual school records can be more easily retrieved and shared.
- DNPE should separately record a private school's mailing address and physical address.
- DNPE should record and verify the years in which a private school opened and closed.

- DNPE should provide accurate and closely-vetted lists of opened schools for each school year in a consistent format.

Recommendations to Improve Data Collection by SEAA and Other Agencies

- Any information submitted by private schools to SEAA and other state agencies should be done in a consistent format to ensure readability and usability. Relevant information includes standardized test scores and tuition information, which were submitted in a wide variety of formats during the years of this study, some of which are unreadable. An electronic data collection tool would help with this process and also would help agencies monitor compliance with data submission requirements. Of note, data collection at one of those agencies, SEAA, has benefitted from technical upgrades in place since 2016, allowing for consistent formatting of documents submitted by schools for their Opportunity Scholarship students.

References

- Helms, A.D. (2019, February 11). NC voucher fund leaves millions unspent while growing by \$10 million a year. *The Charlotte Observer*. Retrieved from <https://www.charlotteobserver.com/news/local/education/article225933910.html>.
- NCES Handbook of Survey Methods (2008). National Center for Education Statistics, Institute of Education Sciences: Washington, D.C. Retrieved from <https://nces.ed.gov/statprog/handbook/pdf/pss.pdf>.
- U.S. Department of Education (2009). State regulation of private schools. Washington DC: Office of Innovation and Improvement. Retrieved from <https://www2.ed.gov/admins/comm/choice/regprivschl/index.html>.

Appendix A

Sample Annual Private School Report, Submitted to DNPE

NON-PUBLIC SCHOOL ANNUAL REPORT – 15-16 Term

Please complete & return by mail or fax or submit via DNPE website by May 1st: NC Division of Non-Public Education Phone: (919) 733-4276
 1309 Mail Service Center Fax: (919) 733-4377
 Raleigh, NC 27699-1309 Web: www.ncdnpe.org

County: FORSYTH Aug - NOV ²⁰¹⁵ School: _____

Mailing address: _____
 P.O. Box #, Street, etc. City Zip Code

Physical address: _____
 Street City Zip Code

Chief administrator: _____ Phone: _____

School's e-mail address: _____

School's web address: _____

Owner: _____ Number of teachers & administrators: _____

Type: Religious _____ or Independent Boarding _____ Day

Student enrollment – enter current number of boys and girls at each grade level:

Grade	5K	1	2	3	4	5	6	7	8	9	10	11	12
Boys													
Girls													

School term dates: First day 8/17/15 Last day 6/2/16

Are student attendance records maintained and on file at the school? yes

Are students immunized according to law and are records at the school? yes

Was a nationally standardized achievement test administered to each student enrolled last school year in grades 3, 6, 9 & 11, and are the results from those tests on file at the school? yes

Standardized test administered: NCJII Date administered: May 2016

Grade 11 standardized test cut-off score for high school graduation: n/a

Date of most recent fire inspection form on file at school: 9/30/2015

Agency conducting it: W-S Fire Public Safety Center Fire drill frequency: monthly

Date of most recent sanitation inspection form on file at school: 5/21/15

*Agency conducting it: NC Dept. of Environment & Natural Resources Division of Envir. Health Numerical grade: 94.5

Regular fire and sanitation inspections are required. If it has been longer than 12 months since your most recent inspections, please call your county health department and fire marshal to remind them to inspect your school facility as soon as possible. Conduct fire drills at least monthly.

The information on this Annual Report is accurate to the best of my knowledge and is submitted voluntarily in a spirit of cooperation with the State of North Carolina.

Signature: _____ Date: _____

Appendix B

Sample of Private School Tuition and Fees Documentation

School A:

TUITION	Kindergarten	\$10,700
<i>2016-17 Rates</i>	Grade 1	\$13,500
	Grade 2—5	\$14,975
RELATED FEES	Application Fee	\$100
	School Testing & Interpretation Fee	\$80
	Psycho-Educational Testing Fee	\$250 (paid directly to Southeast Psych)
	Tuition Deposit	\$1500 / \$300 for financial assistance applicants
	Tuition Insurance	If applicable; rates vary. (See accompanying literature.)
	Student Supply & Activity Fee	\$500 (curriculum; PTO dues; Chesed dues; yearbook; trips; etc.)
	Bus (morning transport only)	\$600 (optional)
	Lunch Program (daily)	\$350 (optional)

School B:

NO. OF CHILDREN	REGISTRATION	BOOK FEE	TUITION	TOTAL	MONTHLY PAYMENT	LATE MONTHLY PAYMENT	MONTHLY PAYMENT INCLUDING WORK HOURS	LATE MO. PAYMENT INCLUDING WORK HOURS
1	\$ 400.00	\$ 125.00	\$ 4,707.00	\$ 5,232.00	\$ 436.00	\$ 456.00	\$ 481.00	\$ 501.00
2	\$ 400.00	\$ 250.00	\$ 9,154.00	\$ 9,804.00	\$ 817.00	\$ 837.00	\$ 862.00	\$ 882.00
3	\$ 400.00	\$ 375.00	\$ 13,361.00	\$ 14,136.00	\$ 1,178.00	\$ 1,198.00	\$ 1,223.00	\$ 1,243.00
4	\$ 400.00	\$ 500.00	\$ 17,472.00	\$ 18,372.00	\$ 1,531.00	\$ 1,551.00	\$ 1,576.00	\$ 1,596.00

School C:

TUITION PAYMENT:

Monthly: \$325.00 for those who pay ten equal payments of \$325.00 each on the 1st of each month. The 1st payment is due **the first day of school** and the last payment is due **May 1st**.

- 1st additional child:** 30% off tuition
- 2nd additional child:** 35% off tuition
- 3rd additional child:**40% off tuition

School D:

Number of Children Enrolled	PARISH RATES				NON-PARISH RATES			
	Annual Tuition	1% discount if paid in full <u>before</u> Aug. 1	10 month payment plan <u>begins</u> Aug. 1	12 month payment plan <u>begins</u> June 1	Annual Tuition	1% discount if paid in full <u>before</u> Aug. 1	10 month payment plan <u>begins</u> Aug. 1	12 month payment plan <u>begins</u> June 1
1	\$4,536	\$4,491	\$453.60	\$378.00	\$5,838	\$5,780	\$583.80	\$486.50
2	\$9,072	\$8,982	\$907.20	\$756.00	\$11,676	\$11,560	\$1,167.60	\$973.00
3	\$13,608	\$13,472	\$1,360.80	\$1,134.00	\$17,514	\$17,339	\$1,751.40	\$1,459.50

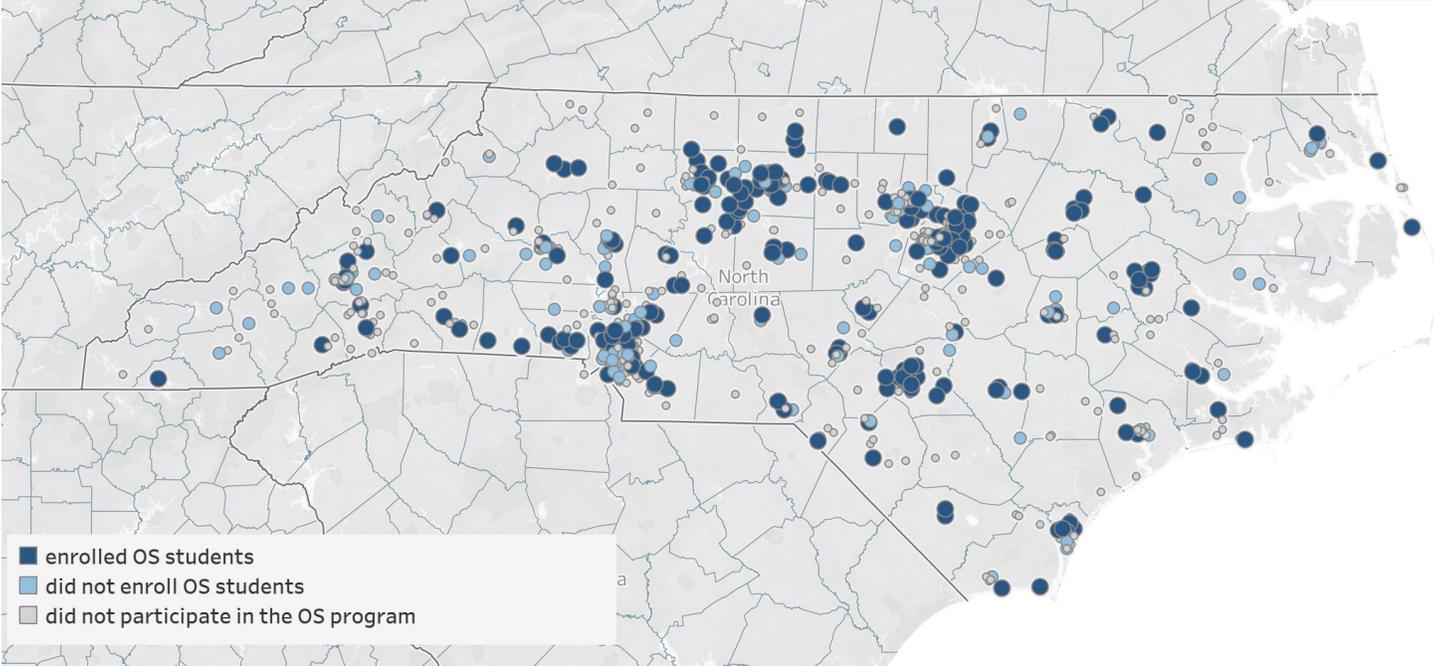
School E:

School Tuition Information:				*\$100.00 Testing Fee not included
Full Year School Tuition	\$7,605.00			
	1st Semester			
Dates	August 29, 2016	thru	January 20, 2017	
Total Weeks	20 weeks (Not including Winter Break)			
1st Semester Tuition	\$3,900.00			
Breaks	Winter Break	Not included in the Tuition		
	December 22, 2016	thru	January 3, 2017	2 weeks
	2nd Semester			
Dates	January 23, 2017	thru	June 9, 2017	
Total Weeks	19 Weeks (Not including Spring Break)			
2nd Semester Tuition	\$3,705.00			
Breaks	Spring Break	Not included in the Tuition		
	March 10, 2017	thru	April 14, 2017	1 week

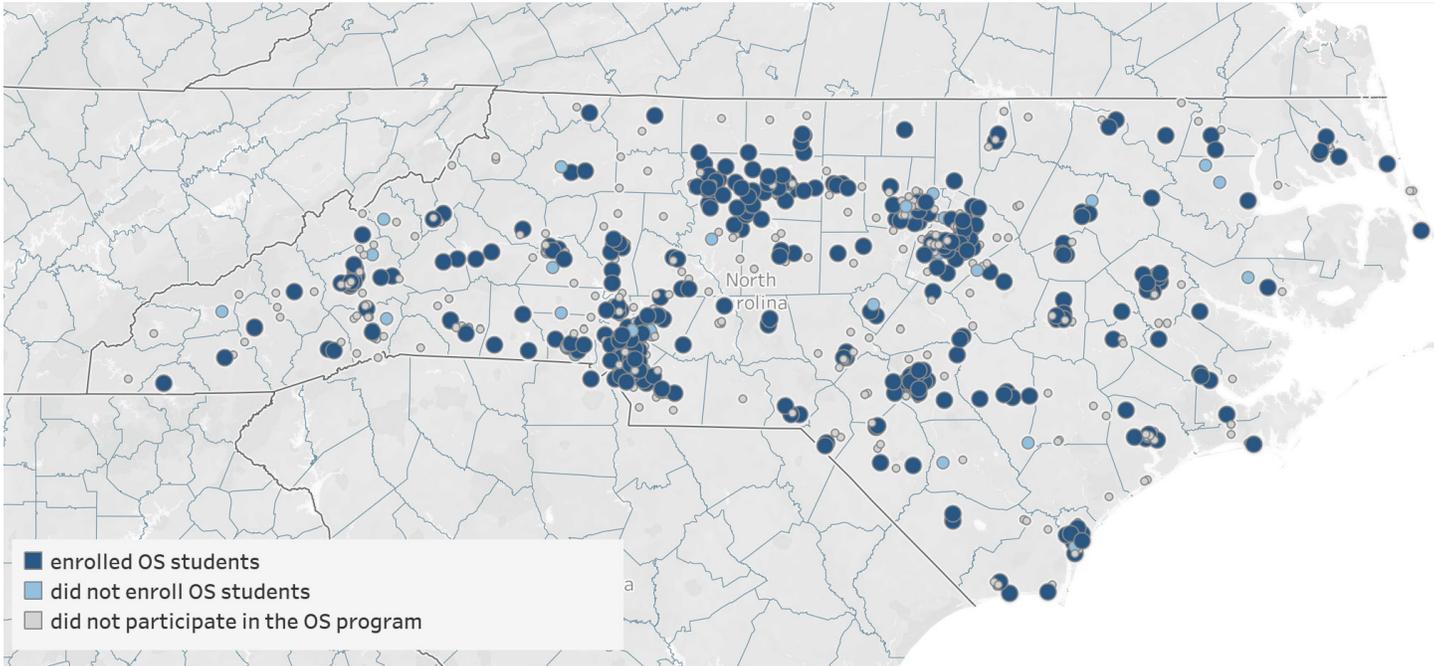
Appendix C

Private school participation in the Opportunity Scholarship program, by year

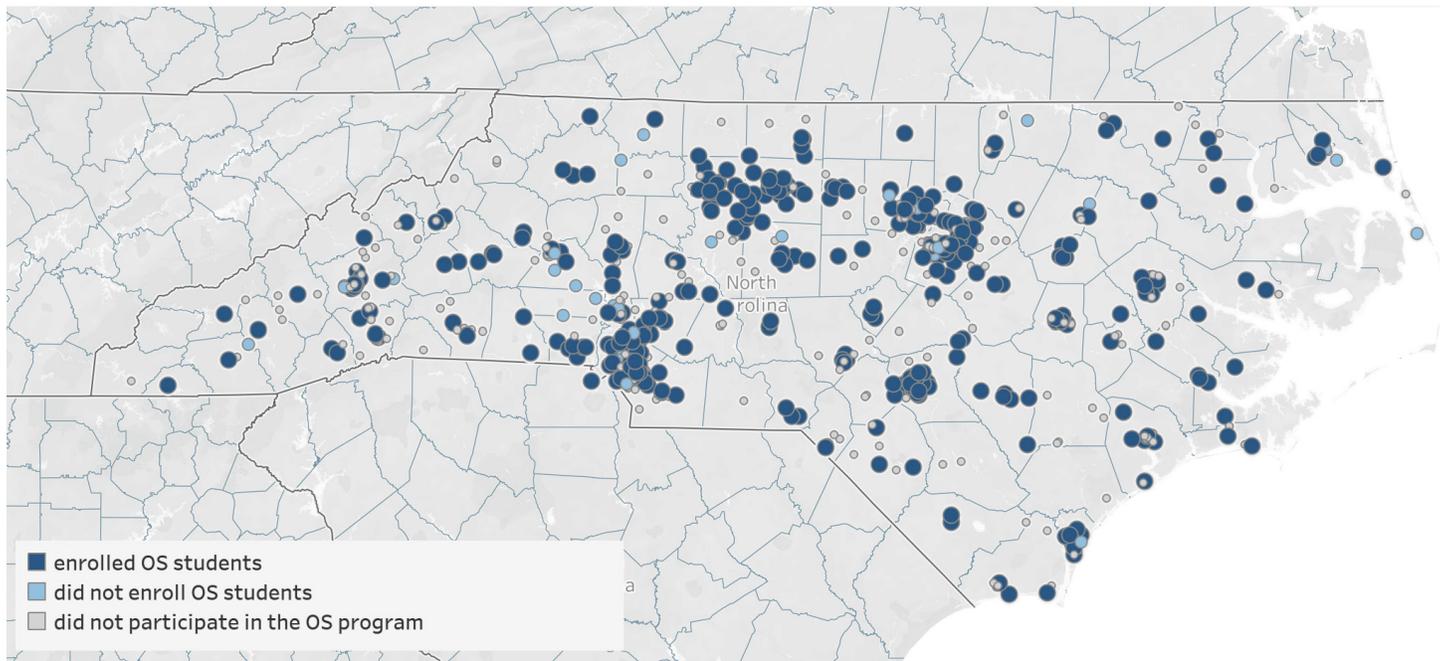
2014-15



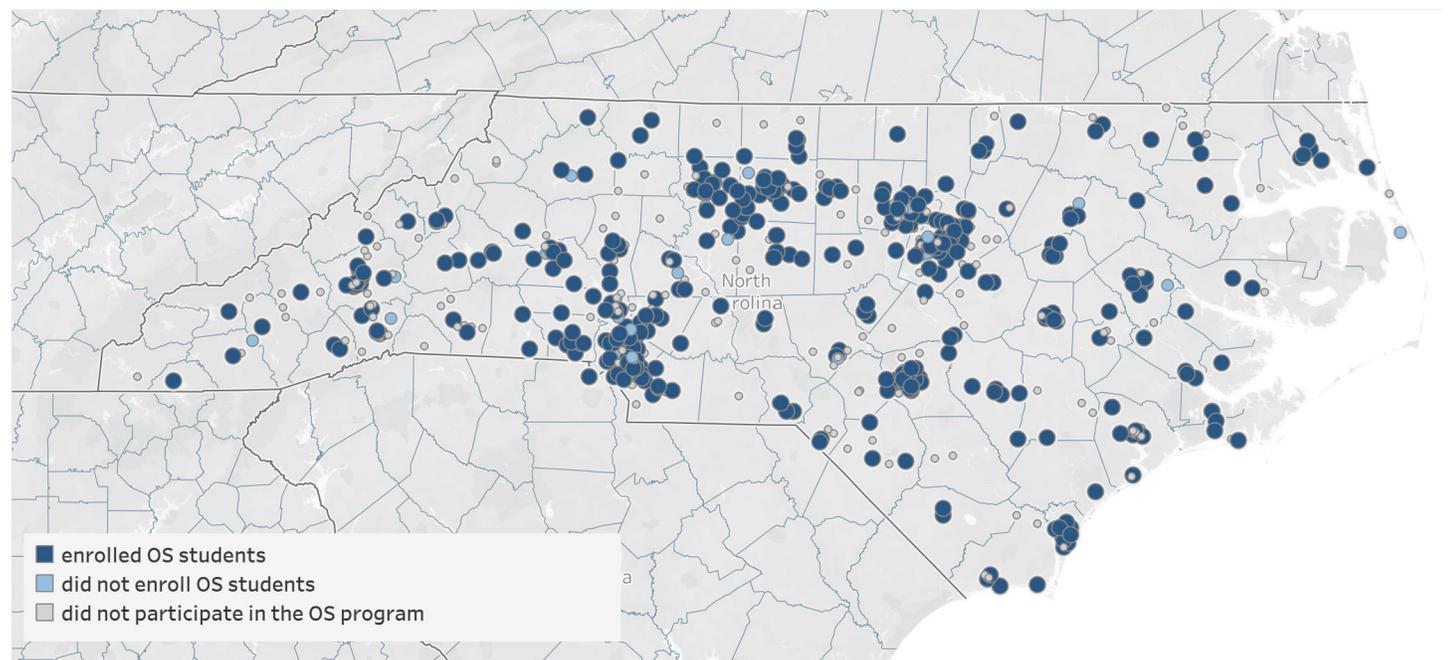
2015-16



2016-17



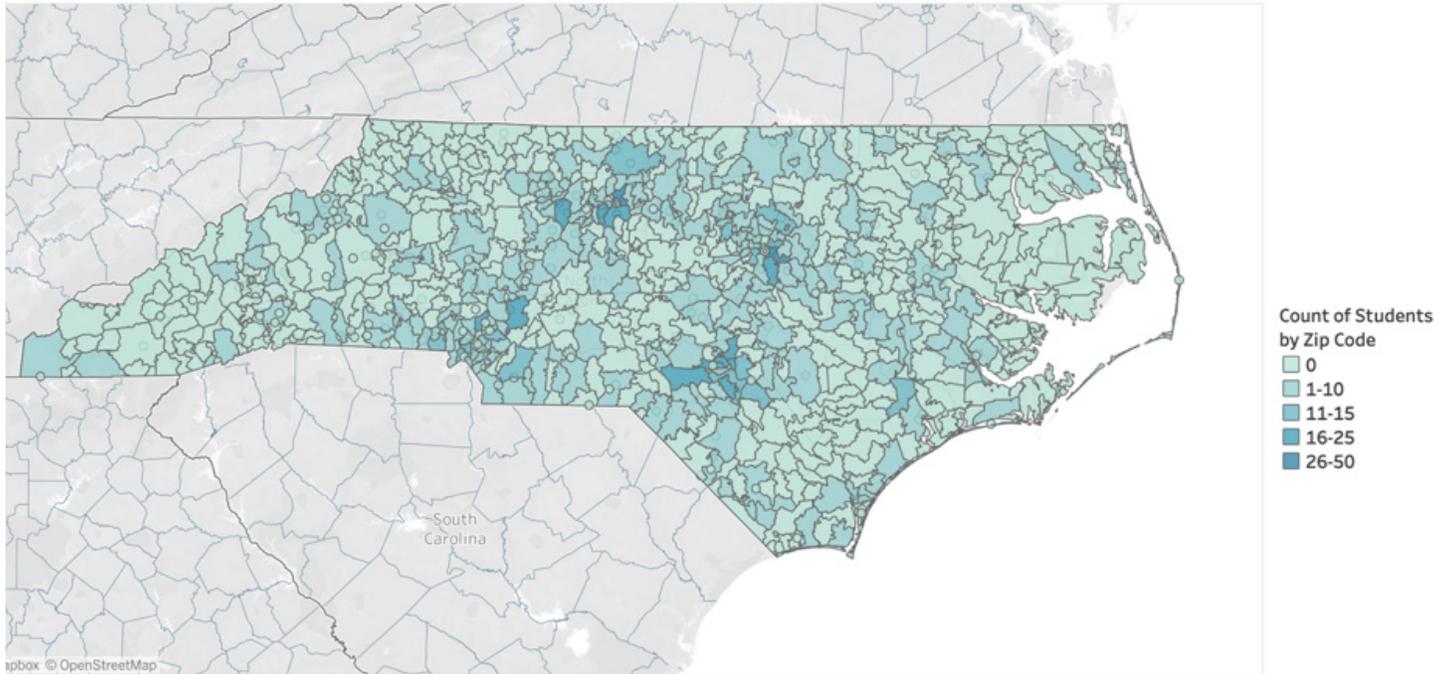
2017-18



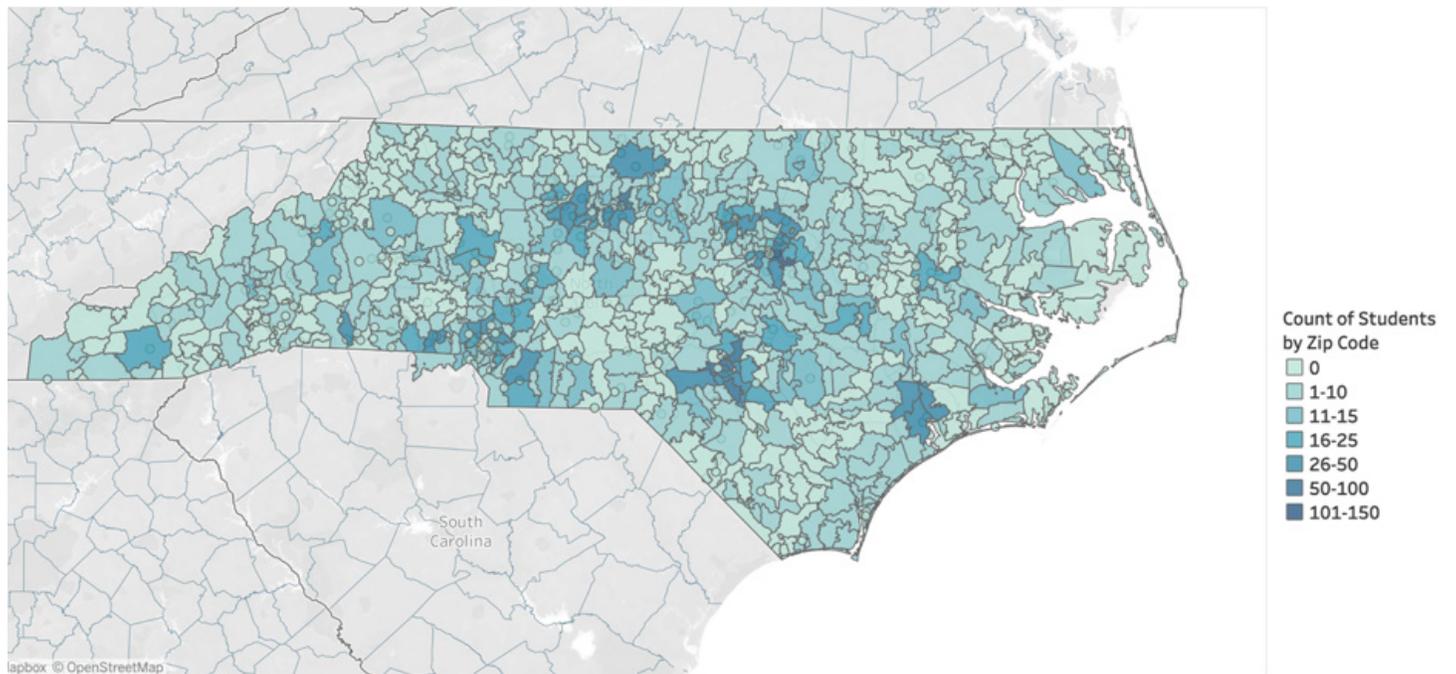
Appendix D

Heat map of applicants to the Opportunity Scholarship program, by year

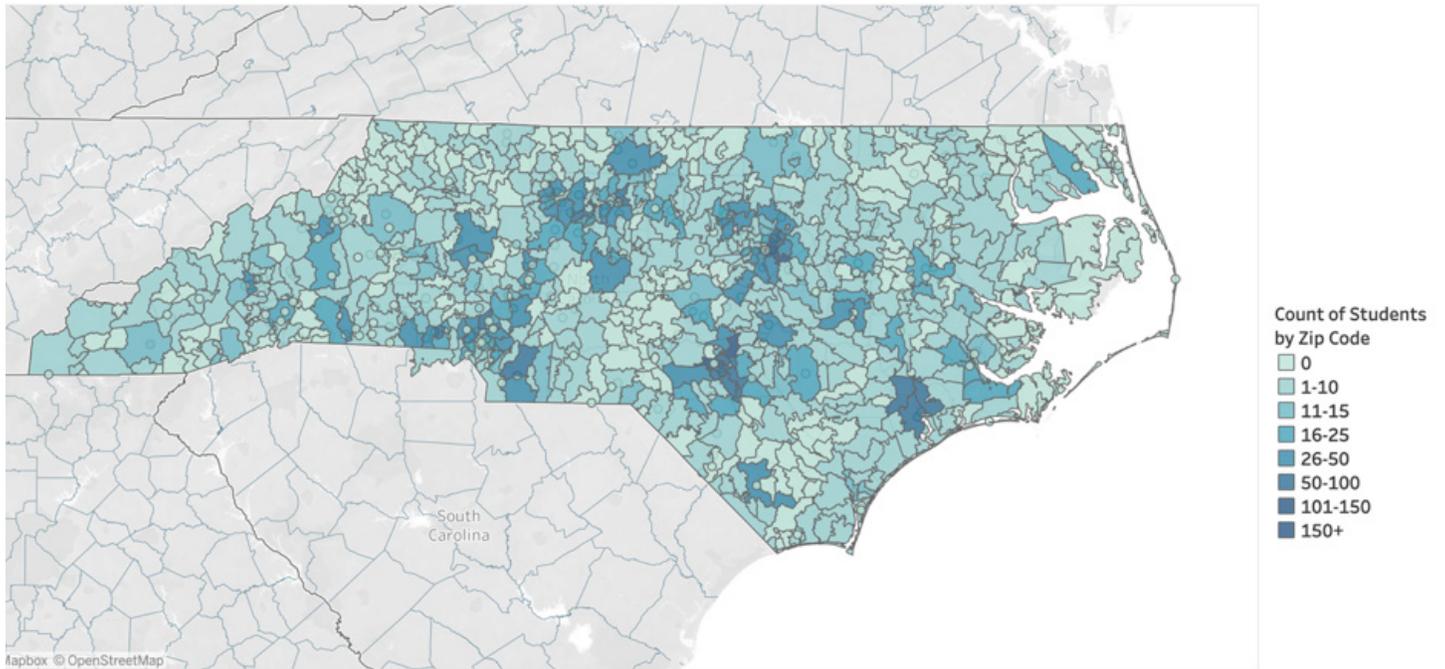
2014-15



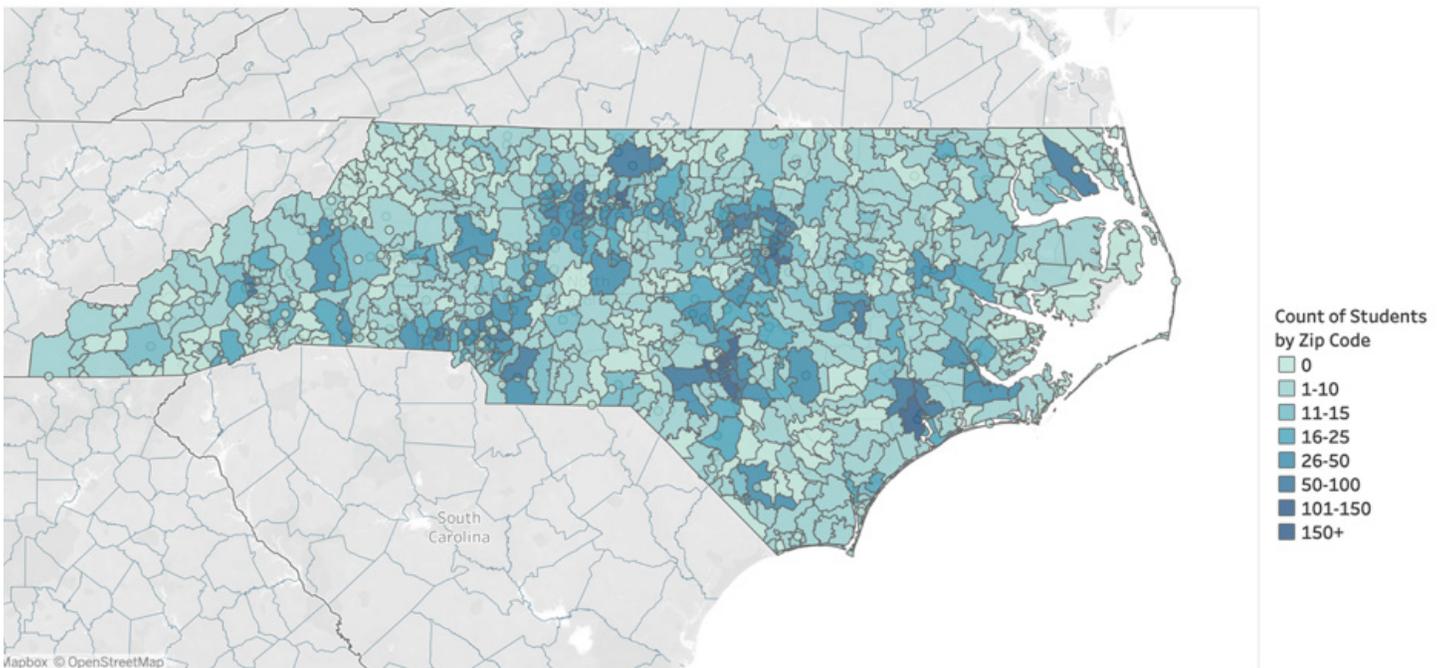
2015-16



2016-17



2017-18



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