

State Planning Allotments

Charter & Lab Schools
Fiscal Year 2026

Presented by
School Business

Key Elements of Budget Build

- **Long Sheet**
 - Helps project the continuation needs for the PSUs for students (ADM changes) and Salary/Benefit estimates.
 - Planning allotments are based on 5th pay period average salary data and benefit rates for the current year.
- **Short Sheet**
 - Also known as the Charter & Lab School (IPS) Reserve
 - Creates the budget for the IPSs by estimating the cost of funding and the individual reserves from applicable PRCs.
 - These reserves will adjust the starting budget for the LEA allotments so changes in the ADM trends affect the starting budget amounts for all PSUs.

Key Elements of Budget Build

- **ADM – Average Daily Membership**
 - The sum of the number of days in membership for all students in an individual public-school unit, divided by the number of school days in the term.
- **Allotted ADM**
 - The higher of the previous year actual first two months average daily membership by grade by school, totaled by public school unit.
- **APM – Allotment Policy Manual**
 - The Allotment Policy provides the basics on how the various PRCs are allocated.
 - It includes definitions of terms, funding eligibility, formulas, governing legislation, special provisions, etc.

Key Elements of Budget Build

- **Planning Allotment**

- The calculated allocation of state and federal funds to PSUs based on the base budget information for budgeting purposes.
- The State Planning Allotment utilizes current budgets and benefit rates along with 5th pay period LEA-average salaries.

- **Initial Allotment**

- This is the PSU budget or Authority to Draw (ATD) for each PRC, or from the base budget in the case of charter and lab schools.
- Special situations may require a Preliminary Initial Allotment
 - State Initial – goal is to allot the Initial within 10 days of July 1 or of the Budget passing, whichever is sooner
 - Federal Initial – most are allotted in September/October but some, such as PRC 017 could be as early as July or August

Key Allotment Terms

- **Independent Public School (IPS)**
 - The term Independent public-school refers to charter schools, regional schools, and lab schools.
- **Allotment System**
 - APEX oracle application that helps us manage and record PRC allotments.
 - IPSs can view base allotment in addition to categorical allotments such as EC, LEP, and School Technology.
- **Revisions**
 - When allotments or adjustments are posted through the Allotment System.
 - A revision may include an allotment and/or a reversion of funding.

Key Allotment Terms

- **Headcount**

- The number of pupils who are defined as a child with a disability or a child with limited English proficiency.
- December EC Headcount is used for all State and Federal allotment formulas (PRCs 0032 CWD and 0060 IDEA).

- **Carryover**

- Funds appropriated but unspent in the first fiscal year that are brought forward for expenditure in the succeeding fiscal year.
- Most State funded allotments that carry over must be approved annually by the NC State Budget Office (OSBM).
 - If approved, these funds are still reverted as of June 30th but the remaining balances are reallocating soon after the Initial Allotments.

Key Allotment Terms

- **DART**

- SBS launched DART (Data Analytics and Reporting Tool) in November of 2024.
- SBS DART is the landing place for State and Federal financial reports.
- There are PSU Reports, Public Facing Reports, and Program Reports. A PSU will have access to public reports and PSU reports but must request login access for the latter.
- For more information, please see the November 26, 2024, School Business newsletter announcement or email the allotment section.

Independent Public School (IPS) Funding

- When allotting funds to charter schools, regional schools, and lab schools – the Department will allot any funds for which independent public-school units are entitled to a **per pupil share (base)** through PRC 0036 – Charter Schools and PRC 0038 – “Z” Schools (regional and lab schools).
- Any **funding with restricted uses** (e.g., compensation bonuses) or for which an independent school must apply directly to the Department in order to receive (e.g., grants) will be allotted to the independent public schools **through the originating PRC**, unless explicitly noted.
 - Independent public-school units will not be permitted to transfer these funds into PRCs 0036 or 0038 and must ensure that the funds are utilized for their intended purposes.
- **Initial Allotments** – After LEA Initial Allotments are processed, existing charter and lab schools receive 100% of their base allotment. New charters and labs receive 50% of their allotment based on their projected ADM and the remaining installment is adjusted (trued-up) per the actual higher ADM of month 1 and 2.

State Dollars Per ADM

- **Dollars Per ADM**

- LEA's State Planning/Initial Allotments divided by the allotted ADM for that LEA.
- The Independent Public Schools (Charter and Lab Schools) receive an amount equal to the state funded dollars per ADM for the LEA in which the public-school unit is located.

State Planning/Initial Allotments for dollars per ADM include the following allocations:

- PRC 0001 Classroom Teachers
- PRC 0002 Central Office
- PRC 0003 Noninstructional Support
- PRC 0004 Program Enhancement Teachers
- PRC 0005 School Building Administration
- PRC 0006 School Health Support
- PRC 0007 Instructional Support
- PRC 0009 Non-Contributory Employee Benefits
- PRC 0013 Career Technical Education Positions
- PRC 0014 Career Technical Education Support
- PRC 0019 Small County Supplemental Funding
- PRC 0024 Disadvantaged Student Supp. Funding
- PRC 0027 Teacher Assistants
- PRC 0031 Low Wealth County Supp. Funding
- PRC 0034 Academically and Intellectually Gifted
- PRC 0056 Transportation
- PRC 0061 Instructional Supplies
- PRC 0069 At Risk Students
- PRC 0071 Supplemental Funds for Teacher Compensation
- PRC 0131 Textbooks

State Initial Allotments & Others

Initial Allotments (Base):

- PRC 0001 Classroom Teachers
- PRC 0002 Central Office Administration
- PRC 0003 Noninstructional Support
- PRC 0004 Program Enhancement Teachers
- PRC 0005 School Building Administration
- PRC 0006 School Health Support
- PRC 0007 Instructional Support
- PRC 0009 Non-Contributory Employee Benefits
- PRC 0013 Career Technical Education Positions
- PRC 0014 Career Technical Education Support
- PRC 0019 Small County Supplemental Funding
- PRC 0024 Disadvantaged Student Supp. Funding
- PRC 0027 Teacher Assistants
- PRC 0031 Low Wealth County Supp. Funding
- PRC 0034 Academically and Intellectually Gifted
- PRC 0056 Transportation
- PRC 0061 Instructional Supplies
- PRC 0069 At Risk Students
- PRC 0071 Supplemental Funds for Teacher Compensation
- PRC 0131 Textbooks

Categorical Allotments (Non-Base):

- PRC 0012 Drivers Training
- PRC 0015 School Technology
- PRC 0032 Children with Disabilities
- PRC 0054 Limited English Proficiency

State Initial Allotments & Others

Initial Allotments (BASE):

- PRC 0001 Classroom Teachers
- PRC 0002 Central Office
- PRC 0003 Noninstructional Support
- PRC 0004 Program Enhancement Teachers
- PRC 0005 School Building Administration
- PRC 0006 School Health Support
- PRC 0007 Instructional Support
- **PRC 0009 Non-Contributory Employee Benefits**
- PRC 0013 Career Technical Education Positions
- PRC 0014 Career Technical Education Support
- PRC 0019 Small County Supplemental Funding
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Categorical Allotments (Non-BASE):

- PRC 0012 Drivers Training
- PRC 0015 School Technology
- PRC 0032 Children with Disabilities
- PRC 0054 Limited English Proficiency

PRC 0009: Non-Contributory Employee Benefits include:

- State Social Security
- State Retirement
- Longevity
- Annual Leave
- Short-term Disability
- Workers Compensation
- Unemployment

State Initial Allotments & Others

Initial Allotments (BASE):

- PRC 0001 Classroom Teachers
- PRC 0002 Central Office
- PRC 0003 Noninstructional Support
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- PRC 0005 School Building Administration
- PRC 0006 School Health Support
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Categorical Allotments (Non-BASE):

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- PRC 0054 Limited English Proficiency

“Kitchen Sink” Allotments & Grants:

- Specialty Schools (HS Reform)
- Treatment Centers
- Burroughs Wellcome
- Teachers and Educators on Loan
- Teacher of the Year (and past TOY)
- Special Small Schools
- Geographically Isolated
- Child & Family Support Teams
- Cooperative Innovative High Schools
- State grants and any remaining special provision state allotments.

State Planning/Initial Dollars Per ADM

- **Dollars Per ADM**

- LEA's State Initial Allotments divided by the allotted ADM for that LEA.



- The Independent Public Schools (Charter and Lab Schools) receive an amount equal to the state funded dollars per ADM for the LEA in which the public-school unit is located.

Dollars per ADM (\$/ADM) **Sample: LEA 000**

FY26 Planning Base Allotment = \$1,000,000

FY26 Allotted ADM for LEA 000 = 200

FY26 \$/ADM (allotted) = $1,000,000 / 200 = \$5,000$

FY26 Unallotted \$/ADM = \$50

(Total PRC 009 Non-Contributory Employee Benefits / Total Allotted ADM for the State)

LEA 000's \$/ADM = \$5,050

Therefore, the Charter and Lab Schools located within LEA 000's area will receive a Base funding of \$5,050 per ADM.

IPS Base Funding

Dollars per ADM (\$/ADM) **Sample: LEA 000**

FY26 Planning Base Allotment = \$1,000,000

FY26 Allotted ADM for LEA 000 = 200

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(Total PRC 009 Non-Contributory Employee Benefits / Total Allotted ADM for the State)

LEA 000's \$/ADM = \$5,050

- When allotting funds to charter and lab schools, the Department will allot any funds for which independent public-school units are entitled to a per pupil share (aka dollars per ADM) which comprises the base funding.

- Base funding is allotted in:
 - PRC 0036 (Charters)
 - PRC 0038 (Labs)

Therefore, the Charter and Lab Schools located within LEA 000's area will receive a Base funding of \$5,050 per ADM. Reminder, the allotted ADM is the higher ADM of month 1 and 2 from the previous year.

IPS Growth Funding

Dollars per ADM (\$/ADM) **Sample: LEA 000**

FY26 Planning Base Allotment = \$1,000,000

FY26 Allotted ADM for LEA 000 = 200

FY26 \$/ADM (allotted) = $1,000,000 / 200 = \$5,000$

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(Total PRC 009 Non-Contributory Employee Benefits / Total Allotted ADM for the State)

LEA 000's \$/ADM = \$5,050

Therefore, the Charter and Lab Schools located within LEA 000's area will receive a Base funding of \$5,050 per ADM.

- Growth funding is based on Higher ADM of 1st and 2nd Month of the current year.
 - PSUs that decline in ADM (from Allotted ADM to current year B1of2) are held harmless; no base funding is reduced.
 - Those that have an increase in ADM are provided growth funding of Dollars per ADM X the increase in ADM.
 - **Sample: LEA 000** grew by 10 ADM and therefore would receive (10 X \$5,050) \$50,500 in their respective PRC.
 - Growth funding is allotted in:
 - PRC 0094 (LEAs)
 - PRC 0036 (CS)
 - PRC 0037 (RSD)
 - PRC 0038 (Labs)


DART

- The landing place for **SBS financial reports**.
 - There are public reports in DART; however, for detailed information specific to a Public-School Unit, access must be requested (select NCDPI Staff).

The screenshot displays the DART landing page. At the top left is the DART logo, a target with a red arrow. To its right is the text 'School Business Data Analytics and Reporting Tool' and 'North Carolina Department of Public Instruction'. Below this is a dark blue navigation bar containing 'Public Reports' with a dropdown arrow and 'Login'. The main content area is titled 'Select Identity Provider' and contains two large buttons: a dark blue 'NCEdCloud' button and a purple 'NCDPI Staff' button. The footer is dark blue and contains the NCDPI logo and contact information on the left, and 'NCDPI LINKS' with 'Education Directory' and social media icons on the right.

DART

- **FY26 Planning Allotments Dashboard (Report 302)**
 - The IPS planning report will be updated in the future to include the categorical allotments (EC, LEP, & School Technology).
 - Base allotment = ADM x Total Dollars per ADM (see below).



School Business Data Analytics and Reporting Tool
North Carolina Department of Public Instruction

PSU Reports ▾ Public Reports ▾ DPI Reports ▾ Finance Reports ▾ Important Links ▾
LEA 000 FCO [Logout](#)

302. Charter/IPS Planning Allotment - Dollars Per ADM

Select PSU:

IPS Dollar Per ADM Planning Allotment			
The following chart shows the calculations for the dollars per ADM for the residential LEA for the charter school displayed. This calculation is used to in determining the PRC0036 allotment. More information will be provided during the upcoming webinar.			
Residential LEA			
Avery County		Avery County	
Dollars Per ADM Calculation			
Description	Marjorie Williams Academy		
	25-26 Planning	06B00 24-25 Initial	Change from Prior Year
Charter ADM	130	109	84
Dollars Per ADM (Allotted State)	9,139	8,539	600
PRC 0009: Dollars Per ADM (Unallotted State)	114	91	23
PRC Total State Funds per ADM (LEA & CS)	9,253	8,630	622

DART

• IPS FY26 Planning Allotments Summary

- The IPS planning summary is posted to the FBS website, under the What's New Section. The summary includes the categorical allotments in addition to the calculated base allotment.

FY 2025-26 Planning Allotment for Charter and Lab Schools					20 Base PRCs	PRC 0015	PRC 0032	PRC 0054	PRC 0036	
Area No	Type	CS No.	CS Name	FY26 Allotted ADM	Area Dollars per ADM	Base Planning Allotment	School Technology	Children with Disabilities (CWD)	Limited English Proficiency (LEP)	Total Planning Allotment
060	CS	06B	Marjorie Williams Academy	130	\$ 9,252.85	\$ 1,202,871	\$ 1,531	\$ 111,682	\$ 49,109	\$ 1,365,193

IPS Dollar Per ADM Planning Allotment

The following chart shows the calculations for the dollars per ADM for the residential LEA for the charter school displayed. This calculation is used to in determining the PRC0036 allotment. More information will be provided during the upcoming webinar.

Residential LEA: Avery County

Dollars Per ADM Calculation:

Description	Marjorie Williams Academy 06B00		
	25-26 Planning	25-26 Initial	Change from Prior Year
Charter ADM	130	109	84
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Dollars per ADM (\$/ADM) **Sample: LEA 000**

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FY26 \$/ADM (allotted) = 1,000,000 / 200 = **\$5,000**

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(Total PRC 009 Non-Contributory Employee Benefits / Total Allotted ADM for the State)

LEA 000's \$/ADM = \$5,050


Therefore, the Charter and Lab Schools located within LEA 000's area will receive a Base funding of \$5,050 per ADM.

DART

- **Low Wealth Calculator (Public Reports)**
 - Displays the details of the latest 5 years of LW allotments and the driving factors which aid in determining any significant changes.


 School Business Data Analytics and Reporting Tool
North Carolina Department of Public Instruction

PSU Reports ▾ Public Reports ▾ DPI Reports ▾ Finance Reports ▾ LEA 000 FCO (Logout)

 North Carolina Department of Public Instruction
301 N. Wilmington
Raleigh, NC 27601
(984) 236-2100

23-24 Final MFR YTD Expenditure Details
23-24 Final MFR YTD Revenue Details
Average Teacher Compensation
Best 1 of 2 ADM History
Chart of Accounts
Covid-19 Allotment Information
Low Wealth Calculator - Updated 4/3/25
Federal FTE by Congressional District
Federal Funding by Congressional District
Federal Funding Impact

NCDPI LINKS
Education Directory



DART

- **Low Wealth Calculator**

- Displays the details of the latest 5 years of LW allotments and the driving factors which aid in determining any significant changes.



School Business Data Analytics and Reporting Tool
North Carolina Department of Public Instruction

PSU Reports ▾ Public Reports ▾ DPI Reports ▾ Finance Reports ▾

LEA 000 FCO (Logout)

Low Wealth Calculator - Updated 4/3/25

Low Wealth Calculator

The following chart shows the county variables that determine an individual county's eligibility and amount of low wealth funding. Please select the county you would like to view. There is a download button to the right to save a copy.

Download PDF

County selection:
Alamance County

010: Alamance County

Full County Allotment:
\$6,609,257

Breakdown by PSU

County Revenue: County Adjusted Property Tax Base

Real property value, Agricultural value, tax base to be adjusted, and weighted sales assessment ratio are determined by the NC Department of Revenue.

Adjusted Real Property Value = Tax Base/Weighted Sales Assessment Ratio
Adjusted Property Tax Base = Adj. Real Prop+Ag Use+Utility Val+Per Prop Val

	21-22	22-23	23-24	24-25	25-26
Real Property Value	\$11,188,776,298	\$11,425,514,074	\$11,697,765,319	\$11,975,369,554	\$21,059,133,150
Less: Agricultural Use Value	\$185,233,886	\$188,531,823	\$187,130,467	\$192,683,233	\$314,411,271
Tax Base to be Adjusted	\$11,003,542,412	\$11,236,982,251	\$11,510,634,852	\$11,782,686,321	\$20,744,721,879
Weighted Sales Assessment Ratio A	94.64%	90.04%	84.74%	104.22%	99.15%
(1) Adjusted Real Property Value (exclude Agricultural)	\$11,626,735,431	\$12,479,989,173	\$13,583,472,802	\$11,305,898,039	\$20,922,563,670

DART

- **Low Wealth Calculator – Breakdown by PSU**
 - Displays the LW allotments details for the eligible county and its charter schools.



School Business Data Analytics and Reporting Tool
North Carolina Department of Public Instruction

PSU Reports ▾ Public Reports ▾ DPI Reports ▾ Finance Reports ▾

LEA 000 FCO [\(Logout\)](#)

Low Wealth Calculator - Updated 4/3/25

LEA and Charter Allotments

Alamance County

LEA No	Lea Name	23-24			24-25			25-26		
		% of County	ADM (Adjusted)	Allotment Amount	% of County	ADM (Adjusted)	Allotment Amount	% of County	ADM (Adjusted)	Allotment Amount
Grand Total		100.0%	25,683	\$6,519,132	100.0%	25,142	\$12,755,520	100.0%	25,454	\$6,609,257
010	Alamance County	88.6%	22,766	\$5,778,709	88.2%	22,185	\$11,255,318	87.9%	22,368	\$5,807,962
01B	River Mill	3.2%	825	\$209,410	3.1%	769	\$390,144	3.1%	782	\$203,050
01C	Clover Garden School	3.2%	822	\$208,649	3.8%	950	\$481,972	3.8%	969	\$251,606

Low Wealth

- **Additional information regarding the Low Wealth Allotment**

- The [Allotment Policy Manual](#) lists the formula elements, and the statutory reference links provide more details on the funding provisions.

LOW WEALTH COUNTIES SUPPLEMENTAL FUNDING (PRC 0031)	
PROGRAM REPORT CODE:	0031
UNIFORM CHART OF ACCOUNTS CODE:	XXX0-0031-XXX
STATUTORY REFERENCE:	G.S. 115C-472.17 SL 2017-57, Section 7.3 SL 2017-197, Section 2.19 SL 2021-180, Section 7.3(h)
TYPE:	Dollars
TERM:	July 1 - June 30
PURPOSE:	To provide supplemental funds in counties that do not have the ability to generate revenue to support public schools (per a legislated formula) at the state average level. The funding is to allow those counties to enhance the instructional program and student achievement.
ELIGIBILITY:	Eligible LEAs are those located in counties in which the calculated county wealth (per the legislated formula) is less than 100% of the state average wealth.
FORMULA:	All data used for this formula will be the most recent data as of January 15 of the preceding fiscal year of the allotment. The formula for this allotment is as follows: <ol style="list-style-type: none">1) Compare a county's ability to generate revenue (using three criteria) with the average ability to generate revenue of the other 99 counties in the state.<ol style="list-style-type: none">a) Purpose: The overall wealth of a county is considered critical in determining if a county can generate the necessary revenue to support the LEA(s) located within the county. The formula attempts to project the county's ability to generate revenue as compared to other counties in North Carolina.b) Criteria:<ol style="list-style-type: none">i) Anticipated Total County Revenue – This anticipated revenue is generated from the property value in the county plus the revenue a county actually receives from sources such as sales taxes and fines and forfeitures. The property value has been adjusted by a formula to take into consideration the year the property was last valued. This calculation is projected to be almost 95% of all the revenue available to a county for current expense.ii) Tax Base per Square Mile (Density) – This part of the formula compares the value of a county's property per square mile with the state average property value per square mile. This calculation attempts to recognize the "swamp land" (low to no value property) across the state and to compare the quantity of this property with all other counties.

Data elements and factors that significantly affect the LW allotment:

- Eligibility
 - Counties in which the calculated county wealth (per the legislated formula) is less than 100% of the state average wealth.
 - This is an annually rescaled metric as the counties are ranked per the benchmark
- Recent Property Valuations
 - Significant changes to property valuations or taxes will affect the county's poverty ranking.
- Local Minimum Effort
 - Minimum effort is established to determine if a county is committing a comparable effort compared to other counties within the State; this is especially important if the county has undergone property valuations.

Reminder

- * These funds are meant to supplement and not supplant local funds.

Supplemental Funds for Teacher Compensation

- **Additional information regarding the SFTC Allotment**

- The [Allotment Policy Manual](#) lists the formula elements, and the statutory reference links provide more details on the funding provisions.

Revised August 2, 2024

SUPPLEMENTAL FUNDS FOR TEACHER COMPENSATION (PRC 0071)

PROGRAM REPORT CODE: 0071
UNIFORM CHART OF ACCOUNTS CODE: XXXX-0071-XXX
STATUTORY REFERENCE: [SL 2021-180 Section 7A.12](#)
[SL 2022-74 Section 7A.9](#)
[SL 2023-134 Section 7A.4](#)
[SL 2024-39, Section 1.7B](#)

TYPE: Dollars
TERM: July 1 - June 30
PURPOSE: To provide funds to eligible LEAs to provide salary supplements to teachers and instructional support in those units.
ELIGIBILITY: LEAs within eligible counties.
An eligible LEA located in whole or in part in a county that has an adjusted market value of taxable real property of less than \$50,900,000,000 based on data provided by the Local Government Commission the previous fiscal year.
FORMULA: The formula for allotment is as follows:
1) Calculate a county allocation for each eligible county using the following steps:
a. Determine the **composite value** for each eligible county. The composite value is the sum of:
i. The taxable real property factor for the county [the median adjusted market value of taxable real property⁽¹⁾ in the State divided by the adjusted market value of taxable real property of that county] multiplied by 65%.
ii. The median household income factor for the county [the median household income⁽²⁾ in the State divided by the median household income for that county] multiplied by 25%.
iii. The effective tax rate factor for the county [the effective tax rate for that county divided by the median effective tax rate in the State⁽³⁾] multiplied by 10%.
b. Determine the **supplement factor** for each eligible county. The supplement factor is the composite value (calculated in Step a) multiplied by the number of State-funded certified teachers and instructional support personnel employed in a school in a LEA in the county.

Data elements and factors that significantly affect the SFTC allotment:

- Eligibility
 - An adjusted market value of taxable real property of less than \$50,900,000,000
 - Total Adjusted Taxable Property Value = Assessed Taxable Real Property divided by Sales Ratio
 - Effective Tax Rate = County Tax Rate times Sales Ratio
- Median Household Income
 - Per the most recent U.S. Census Bureau, Small Area Income and Poverty Estimates (SAIPE) Report

Reminder

* These funds are meant to supplement and not supplant local funds.

Allotment Resources

- **Allotment Section of FBS Website**
 - [Allotments — Funding Public School Units | NC DPI](#)
 - PRC policies, provisions, and guidance: [Allotment Policy Manual](#)
- **“What’s New” Section of FBS Website:**
 - [What's New — Financial and Business Services | NC DPI](#)
- **Allotment System (for PSUs)**
 - Site-specific data requires access permission in the [Allotment System](#)
 - There is a public site that provides general information.
- **School Business Data Analytics & Reporting Tool (DART)**
 - Site-specific data requires access permission in [SBS DART](#)
 - There is a public site that provides general information.
- **The School Business Newsletter**
 - Includes updates from the Allotment Section regarding upcoming state and federal allotments and transfer deadlines. We strongly suggest subscribing if you have yet to do so.

Best Contact Methods

- **General Allotment Email**

- Allotments@dpi.nc.gov
- Provides multiple Analysts access to your inquiry, update, or request.

- **Staff Direct Email**

- If you email Analysts directly, please copy the manager so we can ensure you are getting timely and appropriate responses.

- **Via Phone**

- For urgency and/or clarity, a phone call may sometimes be required.
- If needed, please leave a detailed voicemail so that we may follow up effectively and efficiently.

Questions or Comments?



Thanks for all you do!

teamwork
MAKES THE
dream work