

Equity Planning 101 Technical Assistance

Office of Federal Programs
October 2025





Equity Plan Contacts

Melanie Rhoads—West (W, SW, P-T, and NW)

Melanie_rhoads@dpi.nc.gov

Robin Roberson—East (NC, NE, SE, and Sandhills)

Robin.roberson@dpi.nc.gov

Timothy Dryman—Section Chief-Consolidated Programs

Timothy.dryman@dpi.nc.gov



Educator Equity Under ESSA

- ESEA, as amended by the Every Student Succeeds Act (ESSA) of 2015 Section. 1112(b)(2), requires SEAs and LEAs/PSUs to address whether low-income and minority students served by Title I, Part A are taught at **disproportionate rates by ineffective, out-of-field, or inexperienced educators to compared to their peers.**
- The local educational agency will identify and address, as required under State plans as described in section 1111(g)(1)(B), any disparities that result in **low-income students** and **minority students** being taught at **higher rates than other students by ineffective, inexperienced, or out-of-field teachers.**

The State Board is committed to delivering equitable opportunity to every student in North Carolina, bearing in mind that “fair” is not always “equal”, and equal is not always equitable. Therefore, “Educational Equity” is the belief and practice of ensuring that every student is treated in a fair and just manner, providing the necessary allocation of resources for the success of every student, and eliminating discriminatory barriers to full participation and opportunities for every student.

Equity plans are an opportunity for PSUs to **think deeply and plan strategically** for how to ensure that **all students receive instruction from effective teachers** and that we **address any disparities** that result from low-income and minority students being taught **at higher rates than other students by ineffective, inexperienced, out-of-field teachers.**

Equity Plan Components

- The Equity Plan **MUST** be completed by all PSUs that receive Title I funds, *even if data indicates there are no inequities*. In this case, complete the section and click on and describe the strategies that are used to prevent inequities.
- The Equity Plan includes both the **Equity Gap Calculation Tool** and **Equity Narrative Plan**. *Both must be completed to satisfy the federal requirement.*
- PSUs must use data pulled after October 1 and before December 1 to complete this report.
- All columns of the tool must be complete. If a column is not applicable, please place a 0 in the column.
- The report will be available from **October 1- December 1** and must be uploaded in the History Log of CCIP, no later than **December 1, 2025**.



The PSU Equity Plan

 North Carolina Department of
PUBLIC INSTRUCTION

North Carolina Equity Report- Data Component FY26

The Equity Report includes both the Equity Gap Calculation Tool and Equity Narrative Plan. Both must be complete to satisfy the federal requirement. Data must be retrieved on or after October 1 to complete this report. All columns of the tool must be complete. If a column is not applicable, please place a 0 in the column. The report will be available from October 1 - December 1 and must be uploaded in the Document Library of CCIP, no later than December 1, 2025.

PSU Name : _____
 PSU Code: _____
 Date(s) information collected: _____
 Date of this report: _____

Grade Spans	
Elementary School =	K thru 5th grade
Middle School =	6th thru 8th grade
High School =	9th thru 12th

The name and categorization of schools on this tool must match the building eligibility page in CCIP.

Data Collection:

PSU leadership must collaborate with stakeholders to analyze data, determine root causes of local equity gaps, identify strategies most likely to address equity gaps, consider how to implement proposed equity strategies, leverage funding and monitor long-term implementation of strategies

 North Carolina Department of
PUBLIC INSTRUCTION

North Carolina Equity Report- Narrative Component

Federal ESSA regulations under Title I, Part A Section 1112(b)(2) require that all local educational agencies (LEAs) that receive Title I-A funds develop a plan for how the LEA will identify and address any disparities that result in low-income students and minority students being taught at higher rates than other students by ineffective, inexperienced, or out-of-field teachers. This section of ESSA requires that all LEAs that receive Title I-A funds create and submit plans describing how the LEA will improve gaps identified from the data analysis. To this end, LEAs are expected to have the plan to ensure the equitable distribution of teachers.

The Equity Report includes BOTH the Data and Narrative Component. Both must be complete to satisfy the requirement of the Federal Regulation. The excel file must be complete to satisfy the data component. PSUs must use data pulled after October 1 to complete this report. The report will be available from October 1 through December 1 and is due no later than December 1, 2025.

Submission of the Equity Plan must be through a History Log comment in CCIP. Both components must be submitted within the same History Log comment. Never submit the Narrative without the Calculation Tool even if one part has already been approved. Please view the Webinar if assistance is needed.

Name of Person Completing the Survey: Click or tap here to enter text.
 PSU Name: Click or tap here to enter text.
 PSU Number: Click or tap here to enter text.

Preparer attestation: Your signature below indicates that this Equity Plan and its data was reviewed by a committee of stakeholders before submission. An **original signature** is required.

Original Signature: _____

Narrative Component:

Strategically address disparities that result from low-income and minority students being taught at higher rates than other students by ineffective, inexperienced, out-of-field teachers.

Data Collection

North Carolina Equity Report- Data Component FY26									
on Tool and Equity Narrative Plan. Both must be complete to satisfy the federal requirement. Data must be retrieved on or after Oct please place a 0 in the column. The report will be available from October 1 - December 1 and must be uploaded in the Document Libr									
PSU Name:									
PSU Code:									
Information collected:									
Date of this report:									
<table border="1"><thead><tr><th colspan="2">Grade Spans</th></tr></thead><tbody><tr><td>Elementary School =</td><td>K thru 5th grade</td></tr><tr><td>Middle School =</td><td>6th thru 8th grade</td></tr><tr><td>High School =</td><td>9th thru 12th</td></tr></tbody></table>		Grade Spans		Elementary School =	K thru 5th grade	Middle School =	6th thru 8th grade	High School =	9th thru 12th
Grade Spans									
Elementary School =	K thru 5th grade								
Middle School =	6th thru 8th grade								
High School =	9th thru 12th								
The name and categorization of schools on this tool must match the building eligibility page in CCIP.									

Data collection must not occur prior to October 1st.

The reporting date must be prior to December 1, 2025.



School Names and Grade Spans

20		Grade Level Span (Select from drop-down)	Total Student Enrollment	Nu
	School Name			
21				
22				
23				
24				
25				
26				
27				
28				
29				
30				

School names must match the Building Eligibility page in CCIP

Grade Spans	
Elementary School =	K thru 5th grade
Middle School =	6th thru 8th grade
High School =	9th thru 12th

The name and categorization of schools on this tool must match the building eligibility page in CCIP.

Grade Spans must match the Building Eligibility page in CCIP

FY 26 Equity Plan Components



Narrative Component: Teacher Certification- Percentage of Out of Field Teachers

TEACHER CERTIFICATION - Percentage of Out of Field teachers

For each area, based on an analysis of data from the Equity Gap Calculation Tool, answer the following questions to demonstrate how the PSU will develop, review, and evaluate strategies to eliminate any teacher quality inequities.

Choose at least one strategy but no more than three. Even if there are no current inequities, choose strategies that the PSU uses to prevent inequities. Answer ALL questions, even if the answer is No or N/A.

1. Do inequities between schools and/or grade spans related to out of field teachers exist within the PSU? If there is at least a 10% difference in the number of out of field teachers in any school based on the Equity Gap Calculation tool, then an inequity is present, and it must be noted. ☐ Yes ☐ No
2. If yes, please describe the inequities that exist between school types. If no, please enter "No" in the field below. Examples of school types include: Title I to non-Title I, high minority to low minority enrollment rates and urban to rural locales. [Click or tap here to enter text.](#)
3. If yes, please describe the inequities that exist between grade spans. Single site schools must describe any inequities between grade spans. If no inequities exist between grade spans, please enter "No" in the field below. Grades spans should match the grade spans indicated on the Equity Gap Calculation Tool - K-5, 6-8, 9-12. [Click or tap here to enter text.](#)
4. Identify at least one strategy the LEA will use to eliminate the inequities related to teacher certification that will be described below. **Select no more than 3 strategies.**
 - ☐ Active recruiting strategies
 - ☐ Certification Pathways to Full Licensure with Colleges and Universities
 - ☐ Collaboration with colleges and universities
 - ☐ Hiring qualified and experienced teachers for each classroom
 - ☐ Licensure checks as a part of the hiring process
 - ☐ New Teacher Support Programs
 - ☐ Reimbursement for tuition and testing requirements
 - ☐ Retention bonuses
 - ☐ Signing bonuses
 - ☐ Tuition assistance for Instructional Assistants
 - ☐ Other. Please name and describe: [Click or tap here to enter text.](#)

- Before completing this section of the narrative, stakeholders should review current data from the Equity Gap Calculation tool, and the Equity Plan from the previous year.
- In addition, stakeholders should conduct a Root Cause Analysis to determine the root causes for the identified inequities (e.g., Fishbone, 5 Whys Protocol).

Definition of Clear License Types

Clear License Types:

- Professional Educator's Initial License
- Professional Educator's Continuing License
- Administrator/Supervisor License
- Residency license – a pathway to a clear license

Out – of – field License Types:

- Emergency License
- Permit to Teach

Teacher Experience – Percentage of Beginning Teachers

TEACHER EXPERIENCE - Percentage of Beginning Teachers

For each area, based on an analysis of data from the Equity Gap Calculation Tool, answer the following questions to demonstrate how the PSU will develop, review, and evaluate strategies to eliminate any teacher quality inequities.

Choose at least one strategy but no more than three. Even if there are no current inequities, choose strategies that the PSU uses to prevent inequities. Answer ALL questions, even if the answer is No or N/A.

11. Do inequities between schools and/or grade spans related to teacher experience exist within the PSU. If there is at least a 10% difference in the number of beginning teachers in any school on the Equity Gap Calculation Tool, then an inequity is present, and it must be noted. Beginning teachers are defined as those with 3 years or less experience.

☐ Yes ☐ No

12. If yes, please describe the inequities that exist between school types. If no, please enter "No" in the field below. Examples of school types include Title I to non-Title I, high minority to low minority enrollment rates and urban to rural locales. [Click or tap here to enter text.](#)

13. If yes, please describe the inequities that exist between grade spans. Single site schools must describe any inequities between grade spans. If no inequities exist between grade spans, please enter "No" in

the field below. Grades spans should match the grade spans indicated on the Equity Gap Calculation Tool - K-5, 6-8, 9-12. [Click or tap here to enter text.](#)

14. Identify at least one of the strategies the LEA will use to eliminate the inequities related to teacher experience. **Select no more than 3 strategies.**

- ☐ Active recruiting strategies
- ☐ Collaboration with colleges and universities
- ☐ Hiring qualified and experienced teachers for each classroom
- ☐ New Teacher Support Programs
- ☐ Retention bonuses
- ☐ Signing bonuses
- ☐ Tuition assistance for Instructional Assistants
- ☐ Other. Please name and describe: [Click or tap here to enter text.](#)



Teacher Effectiveness – Percentage of Effective Teachers

TEACHER EFFECTIVENESS- Percentage of Effective Teachers

For each area, based on the analysis of data from the Equity Gap Calculation Tool, answer the following questions to demonstrate how the PSU will develop, review, and evaluate strategies to eliminate any teacher quality inequities.

Choose at least one strategy but no more than three. Even if there are no current inequities, choose strategies that the PSU uses to prevent inequities. Answer ALL questions, even if the answer is No or N/A.

21. How is teacher effectiveness measured within the PSU? Please select the how effectiveness is measured from the list below. Be sure to maintain any documentation that can demonstrate how effectiveness is measured.
- ☐ Combination of EVAAS and NCEES Ratings
 - ☐ EVAAS Ratings
 - ☐ NCEES Ratings
 - ☐ Other. Please name and describe: [Click or tap here to enter text.](#)
22. Do inequities between schools and/or grade spans related to teacher experience within the PSU, if there is at least a 10% difference in the number of effective teachers in any school according to the Equity Gap Calculation tool, then an inequity is present, and it must be noted. Beginning teachers are defined as those with 3 years or less experience.
- ☐ Yes ☐ No
23. If yes, please describe the inequities that exist between school types. If no, please enter "No" in the field below. Examples of school types include Title I to non-Title I, high minority to low minority enrollment rates and urban to rural locales. [Click or tap here to enter text.](#)
24. If yes, please describe the inequities that exist between grade spans. Single site schools must describe any inequities between grade spans. If no inequities exist between grade spans, please enter "No" in the field below. Grades spans should match the grade spans indicated on the Equity Gap Calculation Tool - K-5, 6-8, 9-12. [Click or tap here to enter text.](#)
25. Identify at least one strategy the LEA will use to eliminate the inequities related to teacher effectiveness. **Select no more than 3 strategies.**
- ☐ Collaboration with colleges and universities
 - ☐ Instructional Coaching
 - ☐ Professional Learning Opportunities
 - ☐ Peer Mentoring
 - ☐ Other. Please name and describe: [Click or tap here to enter text.](#)



Additional Questions:

Describe the steps the LEA will employ to execute strategy #1. Click or tap here to enter text.

Describe how the LEA will evaluate the effectiveness of strategy #1. Click or tap here to enter text.

Describe the steps the LEA will employ to execute strategy #2. Click or tap here to enter text.

Describe how the LEA will evaluate the effectiveness of strategy #2. Click or tap here to enter text.

Describe the steps the LEA will employ to execute strategy #3. Click or tap here to enter text.

Describe how the LEA will evaluate the effectiveness of strategy #3. Click or tap here to enter text.

Stakeholder Engagement

Stakeholder engagement could include any of the following groups:

- Teachers
- Instructional support staff
- Instructional specialists
- Principals
- District leaders
- Parents
- Local community organizations
- Institutions of Higher Education



Stakeholder Engagement in the Equity Planning Process

PSUs should engage stakeholder groups in reviewing equity data, and then, facilitate conversations to explore various perspectives regarding interpretations and implications.



The development of equity plans should be fully informed by ideas, insights, and perspectives of various stakeholder groups.



Stakeholders must be encouraged to participate throughout the development and implementation of the equity plan.



Stakeholder Involvement

STAKEHOLDER INVOLVEMENT

32. List the Names AND Positions of Equity Planning Stakeholders. Click or tap here to enter text.
33. Identify the date when the 2025-2026 Equity Plan was developed. This date should be after the data was aggregated/disaggregated. Click or tap here to enter text.
34. Identify the date when the 2025-2026 Equity Plan will be reviewed. A best practice is during the second semester, once the Equity Plan's implementation has begun. Click or tap here to enter text.
35. Identify the date when the 2025-2026 Equity Plan will be evaluated. A best practice is to review it near or after the end of the school year. Click or tap here to enter text.
36. How will the 2025-2026 Equity Plan be shared with the school staff?

- ☐ Public Forum
- ☐ Staff Newsletter
- ☐ School Website
- ☐ Other. Please explain how the equity plan will be shared with school staff Click or tap here to enter text.

****The Equity Report includes BOTH the Data and Narrative Component. Both must be completed to satisfy the requirements of the Federal Regulation. When submitting or re-submitting, be sure to submit both components**



Glossary of Terms and Frequently Asked Questions



Glossary of Terms

Term	Definition
Equity Gap	Gap occurs when low income or minority students are more likely to be assigned to ineffective, novice, and out of field teachers.
Ineffective Teachers	PSUs may choose one of the following definitions to use: Teachers rated below "proficient" on an PSU's approved teacher evaluation system – OR– Teachers who did not meet growth based on the 3-year average in EVAAS system. Essentially, the PSU must provide a percentage of teachers not deemed highly effective and rated as "In Need of Improvement".
Out-of-Field Teachers	The percentage of teachers who do not hold a valid teaching license for the subject or course they teach OR Teachers who hold a provisional license, emergency license, or residential license. Long-term substitutes are also included out-of-field educator measure.
Inexperienced Teachers	Teachers with fewer than three full years of teaching experience. PSUs must provide the percentage of beginning teachers (BTs) by school.
Minority Student	A non-white student, who is a racial or ethnic minority, including Black/African-American, Hispanic/Latino of any race, Asian/ Asian-American, Two or more races, American Indian/Alaskan Native, or Hawaiian Native/Pacific Islander.
Educational Equity	The belief and practice of ensuring that every student is treated in a fair and just manner, providing the necessary allocation of resources for the success of every student, and eliminating discriminatory barriers to full participation and opportunities for every student. (North Carolina State Board of Education)



Data Collection-Common Questions

Which grade spans should be included in the Equity Data Component?

Grades K-12 must be included in the data collection.

If we do not track economically disadvantaged student data monthly, may we use low-income data from the most recently approved ESSR report?

Yes.

Does the low-income data have to match the Building Eligibility page, or should we use current data?

All demographic data should be current, unless there is a documented circumstance that prevents the PSU from retrieving current data. In those instances, data should match the Building Eligibility page.



Data Collection – Common Questions

How do PSUs account for a K-8 schools when looking at grade spans?

PSUs may determine which grade spans best fits any schools that may span across grade spans. For example, if elementary students account for 60% - 90% of the enrollment in a K-8 school, then the school should be listed as an elementary school. PSUs must be consistent with your decision. If you decide K-8 is recorded in the elementary grade span, the PSU should use this categorization for all Equity reporting.

As a charter school serving students in grades K-12, we don't collect economically disadvantaged by grade span. How should we report the number of low-income students by grade span?

The PSU should use the original number of low-income students found on the Building Eligibility Page. Divide the number of low-income students (original number) by the number of grade spans offered at the schools. For instance, a PSU with 3 different grade spans, and 184 low-income students (original number) would calculate the low-income totals for the school as follows: Example: $184/3 = 61.3$ low-income students per grade span. ***Be sure to round up to the nearest whole number.**



Narrative Component- Common Questions

Do PSUs include elective/specials teachers in the equity plan or only classroom teachers?

All teachers of record should be included in Educator Measure data.

If a PSU uses EVAAS for ineffective teachers, should evaluation data be used for teachers who are brand new or do not have EVAAS data?

PSUs should choose only one data source for reporting each of the Educator Measures to ensure consistency. There may be gaps in data due to teacher vacancies and years of experience. PSUs are highly encouraged to choose the data sources with the richest data to better inform your plan.

Is there a special way to document hiring flexibility in Restart Schools?

No. Educator measures for Restart schools should be reported in the same manner as other schools.

Are single site schools required to complete the annual Equity Plan?

Every PSU in the State of North Carolina must submit both components of the annual Equity Plan. Single sites (Charters/LAB schools) are not exempt. Comparisons can be made across grade spans/levels at single sites. Single-site PSUs may also choose to identify holistic gaps and document strategies to address those gaps.

Stakeholder Meetings-Common Questions

How often should stakeholders convene to discuss the Equity Plan?

The type and frequency of stakeholder convening must be determined by the PSU. A strong plan will include **at least three stakeholder convenings** to ensure stakeholder input is captured during the development process, the review/revision process and the evaluation process each year.

For the stakeholder input, may we use the charter schools' SIP monthly discussions as ongoing input, implementation, and review since many of those stakeholders are part of those teams?

Yes. The make-up of stakeholder groups is determined by the PSU.

Should PSUs schedule and hold all 3 meetings with stakeholders on the creation, revision and evaluation of the plan before we submit the plan on December 1?

No. Between October 1 and December 1, stakeholders should convene to analyze data and develop the annual plan to address inequities illuminated by the analysis. Throughout the year, stakeholder input should be sought to review and provide feedback on the implementation of the strategies included in the plan. Stakeholders should also convene to evaluate the effectiveness of the strategies and decide to continue or discontinue the implementation of the strategy. Please refer to the following sample schedule for further details.



Sample Equity Plan Implementation Timeline

Month	Activities
October	➤ Pull data sources pertaining to enrollment of low-income and minority students, inexperienced teachers, out-of-field teachers and ineffective teachers. ➤ Convene stakeholders to analyze data, determine equity gaps, and to develop the Annual Equity Plan.
October- November 30	➤ Convene stakeholders. ➤ Upload the data and narrative components of the annual LEA Equity Plan in CCIP no later than December 1.
January- March	➤ Convene stakeholders to review the implementation of the current Equity plan. <i>*Outstanding Equity Plans will be noted for non-renewal of Title I funds on January 31.</i>
April- May	➤ Convene stakeholders to review the implementation of the current Equity plan.
June- August	➤ Convene stakeholders to evaluate the effectiveness of each of the strategies outlined in the Equity Plan.

Equity Plan Approval Process

Equity data must not be collected before Oct 1.

Equity Data Component and Equity Narrative Plans are due by Dec 1.

Approval and/or feedback will be provided within 30 business days of submission via History Log in CCIP.

On January 31, unresolved Equity Plans will be noted for non-renewal of Title I funding.

****Unresolved plans are those that have not received a FY26 approval comment by NCDPI.***



Equity Plan Submission



Steps for Uploading in CCIP

- Templates can be found in the Consolidated Funding Application under the Title I-A Related Documents on October 1.

	Title IA PRC 0050
	<u>Title I-A Budget</u>
	<u>Title I-A Grant Details</u>
	<u>Title I-A Building Eligibility</u>
	<u>Title I-A Set Asides</u>
	<u>Title I-A School Allocations - PPA List</u>
	<u>Title I-A Related Documents</u> 

Preparing Documents for Submission

- The Equity Narrative Plan can be uploaded as a Word or PDF Document.
- Equity Gap Calculation Tool must be uploaded as an Excel file.
- If the Equity Gap Calculation Tool is uploaded as a PDF document, it will be returned.

Submission

- Click Create Comment, under the History Log found under the FY 2026 Consolidated Funding Application

Sections

Regular Local School District - FY 2026 - FP-Consolidated - Rev 0

Application Status:

Draft Started

Change Status To:

Draft Completed

View NCDPI History Log

View Change Log

Description (View Sections Only View All Pages)

All

History Log

History Log

Create Comment

Remaining Funds

Submission

- Place the applicable comment in the comment section.
- Click select, then attach application(s).

Save And Go To ▶

Create Comment

Comment

Words: 0 Characters: 0

_____(PSU Name)'s FY 26
Equity Plan has been submitted for
review.

Attachments

Select

Send Email to North
Carolina CCIP
Contacts ☐

Save And Go To ▶

Plan Submission

- Click Send Email to North Carolina CCIP Contacts

Save And Go To ▶

Create Comment

Comment

Words: 0 Characters: 0

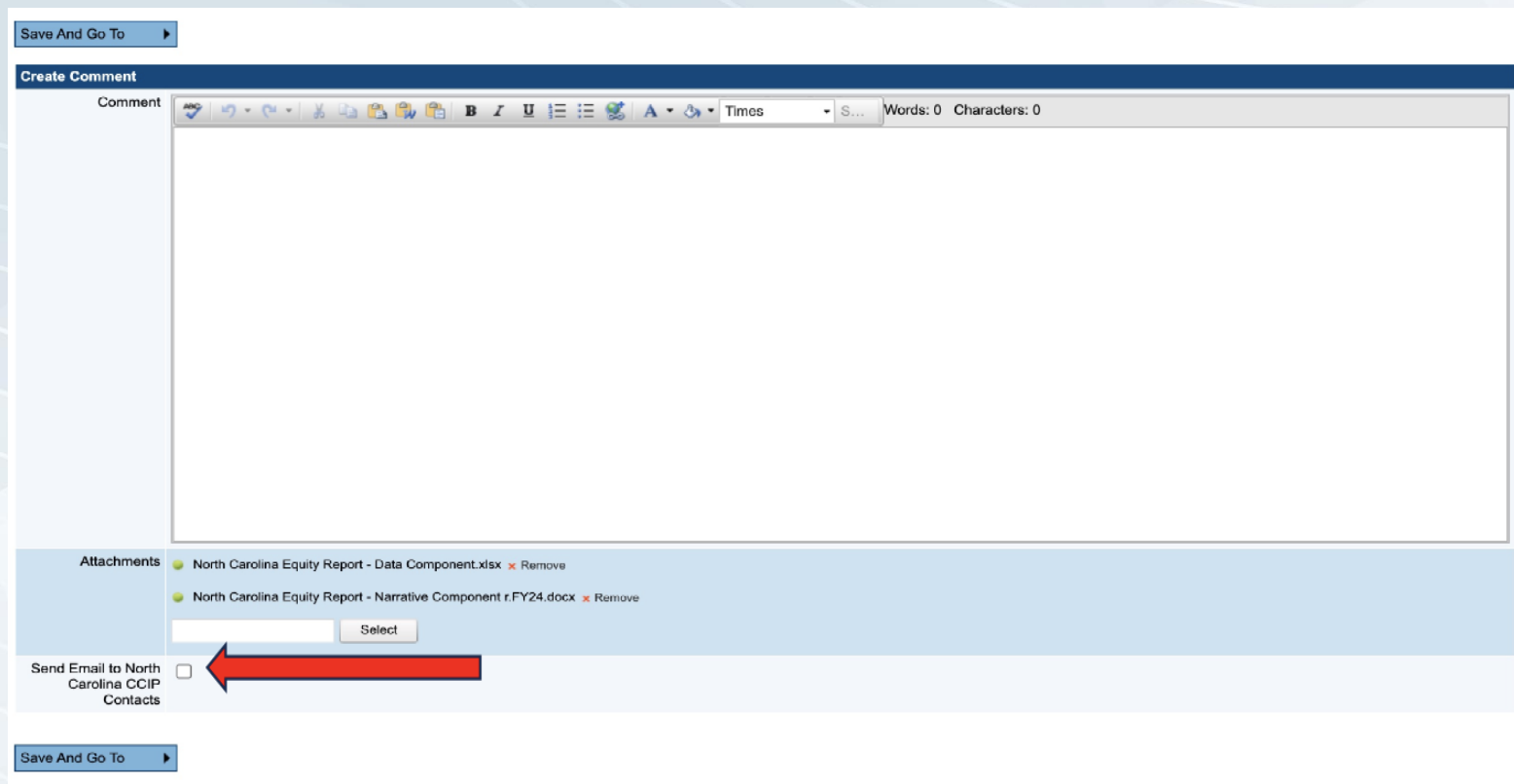
Attachments

- North Carolina Equity Report - Data Component.xlsx Remove
- North Carolina Equity Report - Narrative Component r.FY24.docx Remove

Select

Send Email to North Carolina CCIP Contacts ☐

Save And Go To ▶



Plan Submission

- Select the Name of the appropriate PA
 - Melanie Rhoads--West
 - Robin Roberson--East
- Click Add
- Click Save and Go To
- Click Sections

The screenshot shows a web form titled "Available Contact Groups". It contains several sections for selecting contacts:

- LEA Contacts By Funding Application:** A dropdown menu is set to "FP-Consolidated", and a text box contains "Funding Application Contact". An "Add" button is next to it.
- LEA Contacts By Role:** A list of roles is shown, including "LEA 21st CCLC Data Entry", "LEA Academic Standards - ESSER Competitive Robotics - PRC 201 Budget Data Entry", "LEA Academic Standards - ESSER Competitive Robotics - PRC 201 Competition Budget Data Entry", "LEA Academic Standards - ESSER Plasma Games Grant - PRC 196 Budget Data Entry", and "LEA Academic Standards - ESSER Plasma Games Grant - PRC 258 Competition Budget Data Entry". An "Add" button is at the end of the list.
- Other LEA Contacts:** A text box contains "Planning Tool Contact". An "Add" button is next to it.
- NCDPI Contacts:** A list of roles is shown, including "NCDPI Grants Management Contact", "NCDPI Program Administrator", and "NCDPI Division Administrator". An "Add" button is at the end of the list.
- NCDPI Agency View Contacts:** A list of names is shown: "Melanie Rhoads", "Melanie Sharpe", "Melba Strickland", "Melissa Dearman", and "Melissa Eddy". An "Add" button is next to the list. A red arrow points to this "Add" button, and a red text label "Add appropriate PA (Melanie or Robin)" is next to it.
- Additional Recipients:** A text box is empty. An "Add" button is next to it.

At the bottom of the form, there is a blue button labeled "Save And Go To" with a right-pointing arrow. A red arrow points to this button.

Plan Submission

- Click on History Log to check to ensure the document is present.
- Do **NOT** send the application to Chief Admin Approved.
- Allow 30 business days for a response. If you have not received a response within 30 business days, send an email to the appropriate contact—Melanie Rhoads or Robin Roberson.
- Revisions should be submitted in the same manner.



Equity Plan Contacts

Melanie Rhoads—West (W, SW, P-T, and NW)

Melanie_rhoads@dpi.nc.gov

Robin Roberson—East (NC, NE, SE, and Sandhills)

Robin.roberson@dpi.nc.gov

Timothy Dryman—Section Chief-Consolidated Programs

Timothy.dryman@dpi.nc.gov

