

NORTH CAROLINA

Overall Market Rating: **Growth Ready**

North Carolina’s Opportunity Scholarship program has grown to be one of the largest of its kind in the nation, creating a favorable environment for the creation and growth of private schools. After establishing an eight-year phase-in of higher funding, high demand led the legislature to accelerate the timeline and cross the \$500 million threshold in 2024-25 rather than 2031-32. All private-school students are eligible for scholarships, with amounts tiered to household income. Returning students have first priority, while among new applicants each year low-income students come first. Requirements for schools are modest and include administration of a nationally normed student assessment (with results reported to the state) and a financial review conducted by a CPA. Accreditation is optional. A smaller education savings account program is available for students with special needs.

| + Best ✓ Fair - Inadequate | Program(s) Prioritize Low- Income HHs | Funding Is Adequate to Meet Demand (High or No Cap) | New Schools Eligible in First Year | Per-Pupil Amount Is Adequate | The Application Process Is Family-Friendly | There Is a Supportive Ecosystem for Private Schools |
|-------------------------------|---|--|--|------------------------------------|--|--|
| NORTH CAROLINA | ✓ | ✓ | ✓ | ✓ | ✓ | ✓ |

K-12 Enrollment

| NORTH CAROLINA 2023-24 | | | |
|------------------------|-----------------|----------------|-------------------|
| Total PK-12 | Public District | Public Charter | Private (2024-25) |
| 1,712,947 | 1,426,810 (83%) | 150,399 (9%) | 135,738 (8%) |

Choice Program Details

Opportunity Scholarships

| Eligibility | Amounts | Participation (2024-25) | Other |
|--|---|--------------------------------|--|
| Students with HH incomes up to 185% of federal poverty level are eligible for 100% vouchers; all students are eligible for partial | \$7,686 full value for 2025-26 (up to 185% of FPL) <ul style="list-style-type: none"> • 90% (up to 370% of FPL) • 60% (up to 833% of FPL) • 45% (above 833% of FPL) | 80,472 students 643 schools | • Program was capped at \$542M in 2024-25, three times more than originally budgeted |

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|----------------------------|--|--|--|
| amounts on a sliding scale | | | |
|----------------------------|--|--|--|

Education Student Accounts (ESA+)

| Eligibility | Amounts | Participation (2023-24) | Other |
|--|---|-------------------------|--|
| Students meeting the federal definition of a “child with disabilities” | \$9,000 base value, up to \$17,000 for pupils with specific needs | 3,566 students | <ul style="list-style-type: none"> • \$11,846 avg. award • Usable for tuition, textbooks and select other educational services |

Sources: State of North Carolina, [EdChoice.org](https://www.edchoice.org)