



Public Schools of North Carolina  
State Board of Education  
Department of Public Instruction

---

# Report to the North Carolina General Assembly

---

State Funded Personnel/Merit - Based  
Bonuses to Local Education Agency

*SL 2016-94 Section 36.1A(c)*

---

**Date Due: February 1, 2017**

Report # 46

DPI Chronological Schedule, 2016-2017

## **STATE BOARD OF EDUCATION**

SBE VISION: Every public school student will graduate ready for post-secondary education and work, prepared to be a globally engaged and productive citizen.

SBE MISSION: The State Board of Education will use its constitutional authority to lead and uphold the system of public education in North Carolina.

### **WILLIAM COBEY**

Chair :: Chapel Hill – At-Large

### **BECKY TAYLOR**

Greenville – Northeast Region

### **TODD CHASTEEN**

Blowing Rock – Northwest Region

### **A.L. COLLINS**

Vice Chair :: Kernersville – Piedmont Triad Region

### **REGINALD KENAN**

Rose Hill – Southeast Region

### **WAYNE MCDEVITT**

Asheville – Western Region

### **DAN FOREST**

Lieutenant Governor :: Raleigh – Ex Officio

### **AMY WHITE**

Garner – North Central Region

### **ERIC DAVIS**

Charlotte – At-Large

### **DALE FOLWELL**

State Treasurer :: Raleigh – Ex Officio

### **OLIVIA OXENDINE**

Lumberton – Sandhills Region

### **PATRICIA N. WILLOUGHBY**

Raleigh – At-Large

### **MARK JOHNSON**

Secretary to the Board :: Raleigh

### **GREG ALCORN**

Salisbury – Southwest Region

## **NC DEPARTMENT OF PUBLIC INSTRUCTION**

**Mark Johnson, State Superintendent :: 301 N. Wilmington Street :: Raleigh, North Carolina 27601-2825**

In compliance with federal law, the NC Department of Public Instruction administers all state-operated educational programs, employment activities and admissions without discrimination because of race, religion, national or ethnic origin, color, age, military service, disability, or gender, except where exemption is appropriate and allowed by law.

**Inquiries or complaints regarding discrimination issues should be directed to:**

Deputy State Superintendent :: 6368 Mail Service Center, Raleigh, NC 27699-6368 :: Phone: (919) 807-3200 :: Fax: (919) 807-3388

Visit us on the Web :: [www.ncpublicschools.org](http://www.ncpublicschools.org)

**Report to the chairs of the Senate Appropriations/Base Budget  
Committee and House of Representatives Committee on  
Appropriations and Fiscal Research Division**

**SL 2016-94 Section 36.1A(c)**

The General Assembly appropriated funds for the 2016-17 fiscal year to Local Education Agencies (LEA) to provide bonuses to state funded employees who are not paid from the teacher salary schedule.

LEAs shall use the funds to award one-time merit-based bonuses to State-funded non-educators in accordance with eligibility policies adopted by the LEA. The eligibility policy shall not provide an across-the-board bonus for this purpose. Non-educators include school based administrators, central office and non-certified personnel.

Pursuant to Session Law 2016-94 Section 36.1A(c) , each LEA is required to submit details of how the appropriated funds for merit pay were distributed by the district and school. The report on the use of funds is to be provided to the chairs of the Senate Appropriations/Base Budget Committee and the House of Representatives Committee on Appropriations and the Fiscal Research Division on the use by no later than February 1, 2017.

**Attachment 1** - Provides the board approved plans submitted by the LEAs to the Department of Public Instruction





<b>UNIT #</b>	<b>NAME</b>	<b>UNIT #</b>	<b>NAME</b>
---------------	-------------	---------------	-------------

360	Gaston County	870	Swain County
370	Gates County	880	Transylvania County
380	Graham County	890	Tyrrell County
390	Granville County	900	Union County
400	Greene County	910	Vance County
410	Guilford County	920	Wake County
420	Halifax County	930	Warren County
421	Roanoke Rapids City	940	Washington County
422	Weldon City	950	Watauga County
430	Harnett County	960	Wayne County
440	Haywood County	970	Wilkes County
450	Henderson County	980	Wilson County
460	Hertford County	990	Yadkin County
470	Hoke County	995	Yancey County
480	Hyde County		

# Alamance County Merit Based Bonus Proposal

## 2016-2017 Merit Based Bonus Proposal

State Allotment: \$214,988

### Classified Employee Bonus

<b>Years of Experience</b>	<b>Bonus ***</b>
1-5	\$320
6-10	\$370
11-15	\$420
16-20	\$470
21+	\$520

\*\*\* Amounts are estimated based upon the exact number of employees that qualify. Amounts will be adjusted to ensure utilization of 100% of state provided funds.

- Based upon years of ABSS experience in 2016-2017. If an employee has left ABSS, and returned, years of experience re-start to most recent hire date.
- Must have been employed (in pay status) by ABSS in a permanent classified position as of 9/1/2015.
- Must be currently employed (in pay status) by ABSS in a permanent classified position as of 11/1/2016.
- For part-time employees, the bonus shall be pro rata based on the number of hours worked.
- Employees that are employed less than 20 hours per week are not eligible for the bonus.
- Employee has not received a letter of reprimand and/or memo regarding performance concern from supervisor placed in the employee's official personnel file in Human Resources between 9/1/15-11/1/16.
- Bonus will be paid in December 2016.
- Bonus will not be subject to retirement withholding, but will be subject to FICA taxes.

### Additional Bus Driver Bonus

Additional bonus will be paid to employees who drove a bus (to and from school) greater than 5 cumulative hours during the 2016-2017 school year prior to 11/1/2016. All bus drivers (including those with less than 20 hours, and bus substitutes) are eligible for this bonus.

<b>Drove a bus</b>	<b>Bonus</b>
Yes	\$100.00

- Employee has not received a letter of reprimand and/or memo regarding performance concern from supervisor placed in the employee's official personnel file in Human Resources between 9/1/15-11/1/16.
- Employees may be eligible for classified employee bonus, and additional bus driver bonus if they qualify for both.
- Bonus will be paid in December 2016.
- Bonus will not be subject to retirement withholding, but will be subject to FICA taxes.

## **MERIT-BASED BONUSES – Alexander County Schools**

---

The board will award one-time merit-based bonuses to eligible employees in December, 2016 in accordance with the plan outlined here and North Carolina Session Law 2016-94, section 36.1A. To be consistent with law, the allocation of these one-time bonuses will not be across-the-board. The amount of bonus awarded will not be added to the employee's ongoing base salary and will not be considered compensation for retirement purposes.

### **A. ELIGIBILITY**

To be eligible for a one-time merit-based bonus, an employee must meet the requirements established below.

#### **1. Position Requirements**

To be eligible to receive the one-time merit based bonus, classified employees from the Alexander County School System must possess the following criteria:

- Classified employee
- Currently employed
- Employed during the 2015-2016 school year
- Not allowed to work during teacher workdays for the 2015-2016 school year
- No breaks in service, leaves of absence, transfers from other LEA's or separation of service from the onset of the 2015-2016 school until present.

#### **2. Performance Requirements**

Eligible employees will receive a point value for not having any discipline letters, memos or action plans placed in their personnel file or that are documented by school administration.

#### **3. Other Requirements**

Each eligible employee will receive a point value for longevity, attendance, and for being dually employed. Each point will be tallied and used to determine the amount that each employee will be compensated.

### **B. AMOUNT OF BONUS**

The superintendent shall ensure that the total amount of funds awarded do not exceed the amount of funds provided by the state for the purpose of providing merit-based bonuses. Bonuses shall be allocated as follows:

The amount of state funds received for Alexander County Schools will be divided by the number of points earned by the eligible employees. The earned amount will then be

---

distributed to each employee on a divisional basis.

Legal References: S.L. 2016-94, sec. 36.1A

**\*\* A complete copy of the Merit Bonus Matrix is presented on the following page\*\***

## Merit Bonus Matrix

Employee Name:			
Position(s):		Site:	
Longevity (must be currently employed)	20+ years of Continuous Service	6 - 19 Years of Continuous Service	1-5 Years of Continuous Service
	3 pts	2 pts	1 pt
Attendance (8/24/15 - 6/8/16)	5 absences or less	6 to 8 absences	more than 8 absences
	2 pts	1 pt	0 pts
Performance (8/24/15 - Present)	No discipline letters, memos, action plans on file from 8/23/15 - Present		
	2 pts		
Evaluation (2015-216 school year)	Rating of proficient/standard or higher in all categories with a minimum of 1 rating above proficient/standard	Rating of proficient/standard in all categories	Any rating lower than proficient/standard
	2 pts	1pt	0pts

Value Added (8/24/15 - Present)	Full-time dual employee (Ex. TA/bus driver)	Full-time employee with additional duties (Ex. TA that substitutes as a driver)	Full-time employee
	2 pts	1 pt	0 pts
Total Points earned			
<b>Eligible Employees</b>			
Employees not able to work the 12 workdays			
Supervision Verification Signature: _____		_____	



Board of Education  
Brad Mabe, Chair  
Amy Bottomley, Vice Chair  
Faron Atwood  
Jason Williams  
Steven Williams

Chad Beasley, Superintendent

December 1, 2016

Nicola Lefler  
NC Department of Public Instruction  
Nicola.lefler@dpi.nc.gov

030\_Alleghany\_MeritPay          Summary of Plan

- Eligible employees: school-based administrators, teacher assistants, clerical staff, auxiliary services--bus drivers/cafeteria staff.
- Rubric (which follows) used to differentiate between criteria: years of service, evaluations, performance, & value-added employment types.
- Eligible employees assigned points based on rubric criteria. Total points assigned: 0-2=low performing, 3-5=at standard, 6-8=above standard.
- Merit payment date scheduled for January 13, 2017. Amounts: \$438.13 for employees above standard; \$388.13 for employees at standard.
- Special conditions include paying merit pay to all eligible employees whether monthly salary funded by state, local or federal sources. Note: Only monthly state-funded employees will be paid merit pay from state merit allotment.

Sincerely,

A handwritten signature in black ink that reads "Brent Long".

Brent Long  
Associate Superintendent



## Merit Bonus Matrix

030\_Alleghany\_Matrix Pay

Criteria			
2015 - 2016 Longevity	20+ years of Service	11 - 19 Years of Service	1 - 10 Years of Service
	2 points	1 point	0 points
2015 - 2016 Evaluation	Proficient or higher in all categories / standards with a minimum of 1 area above standard	All proficient	Developing
	2 points	1 point	0 points
2015 - 2016 Performance	August 23, 2015 - present No discipline letters, memos, action plans		
	2 points		
2015-2016 Value Added	Full-time employee with additional responsibilities such as dual employee, coach, etc.	Full-time employee with one defined role	Part-time employee
	2 points	1 point	0 points

Total Points earned			
---------------------	--	--	--

**Eligible Employees**

School Based Administrators

Teacher Assistants

Clerical Staff

Auxiliary Services / Operations

Supervision Verification Signature: \_\_\_\_\_

Break Down of Bonus: 6-8 points  
3-5 points  
0-2 points



Board of Education  
Brad Mabe, Chair  
Amy Bottomley, Vice Chair  
Chad Loggins  
Dr. Suzanne Mellow-Irwin  
Jason Williams

Chad Beasley, Superintendent

December 20, 2016

Nicola Lefler  
NC Department of Public Instruction  
Nicola.lefler@dpi.nc.gov

030\_Alleghany\_MeritPay          Addendum

- Per the 030\_Alleghany\_MeritPay plan submitted on December 1, 2016, the amounts reported to pay were as follows: \$438.13 for employees above standard; \$388.13 for employees at standard.
- After an additional employee-by-employee review, the merit pay amounts were recalculated and changed as follows: \$453.26 for employees above standard; \$403.26 for employees at standard.
- Merit payment date remains scheduled for January 13, 2017.

Sincerely,

A handwritten signature in cursive script that reads 'Brent Long'.

Brent Long  
Associate Superintendent

*Excellence in Education*

**Merit-Based Bonuses S.L.2016-194, Sect. 36.1A**  
**Anson County Schools 040 LEA**

The General Assembly's Appropriations Act (House Bill 1030) contained a provision for merit pay for some certified and non-certified employees. Anson County's allocation is \$63,696.00 provided only to fund merit pay for state-paid "non-certified employees." A significant stipulation of the funding is that it cannot be "across the board."

Anson County's proposed plan was developed around the following guidelines:

1. Per the language from the General Assembly, merit pay will only be paid to employees who are not paid on the teacher salary schedule. "Teacher" includes teachers, school counselors, school social workers, media specialists, psychologist, nurses, etc. paid on the teacher salary schedule. Part-time employees employed for a minimum of 20 hours per week are eligible. Employees regularly scheduled to work less than 20 hours per week are not eligible. Substitutes in the area of child nutrition and classroom teaching as well as returning retirees are not eligible.
2. The merit pay will only be paid to employees who worked for Anson County Schools prior to July 1, 2016. The merit pay will be distributed in January or February 2017. The merit pay will only be paid to employees who are employed at the time of distribution. The merit pay is not subject to retirement benefits.
3. The merit pay will be paid to those certified and non-certified employees who qualify based on one or more of the following criteria:
  - a. Assigned to a school that met, exceeded, or maintained School Performance Grades and/or Growth for the 2015-16 school term.
  - b. Assigned to a school that increased in the School Proficiency Rating for the 2015-16 school term.
4. The General Assembly's bill states that merit pay will only go to "state funded" employees. Anson County Schools will fund local positions with the local funds aligned with each type of position; for example, child nutrition will be funded with child nutrition funds, maintenance will be funded with maintenance funds, etc.
5. The merit pay will be differentiated by the years of service using the following distribution model:

<u>Years of Service</u>	<u>Merit Pay based on Longevity</u>
0-4	\$250.00
5-9	\$350.00
10-14	\$450.00
15-19	\$550.00
20-24	\$650.00
25+	\$750.00

# Ashe County Schools

## Merit Pay Bonus Allocation for Non-Educators

### I. Background

SL 2016-94 Section 36.A1 calls for each LEA to approve a local plan to determine the distribution of funds for the one-time merit pay bonus for non-educators. These funds are to be distributed based on a locally approved plan, they are not to be distributed across the board, they are not to be paid to certified teachers or instructional support, and they are to be paid to state funded personnel only. The principals met with the Superintendent and Human Resources to discuss and develop criteria for the plan. At that time, it was determined that school-based and central service administration would not be included. Therefore, only those employees whose time is tracked hourly would receive this allocated bonus.

### II. Proposal

The Ashe County Board of Education believes that every employee plays a valuable role in the overall function and service of the education system. As such, and knowing the stipulation that there cannot be an across the board distribution of Merit Pay Bonus funds, the Board proposes the funds be distributed based on the criteria listed below.

Employees identified to receive the Merit Pay Bonus shall receive an amount based on total number of points as depicted below.

1 Point	Has no rating below "At Standard" or "Satisfactory" on any final rating as noted by their immediate supervisor for the 2015-2016 school year
1 Point	Has no letter of reprimand placed into their personnel file during the 2015-2106 school year
1 Point	Employed with Ashe County Schools for 0-9 years effective January 1, 2016
2 Points	Employed with Ashe County Schools for 10 but less than 20 years
3 Points	Employed with Ashe County Schools for 20 or more years

Each point is equal to \$114.65. No funds are provided by the State for bonuses for locally or federally paid employees. It is the recommendation of the Superintendent that all identified personnel be included in this bonus and paid from their applicable funding source.

### III. Suggested Timeline

November 2016—Presentation to Board of Education for review, discussion and approval of Merit Pay Bonus Allocation plan.

Distribute the list of eligible employees to the immediate supervisors for their review and final recommendations.

December 2016—Distribution of Merit Pay Bonus

**IV. Additional conditions as required for local policy:**

- a. Amounts—The amount each eligible employee shall receive shall be based on the percentage of employment as well as the overall performance as outlined in Section II.
- b. Special Conditions:
  - (i.) Only employees hired on or before January 1, 2016 are eligible
  - (ii.) Employees must be in pay status as of December 1, 2016 to receive bonus. (This does not apply to any employee on approved paid or unpaid leave.)

**V. Review, Verification, and Payment**

- a. The Superintendent is to submit the names of eligible employees to each immediate supervisor for verification of performance rating and disciplinary record.
- b. Each supervisor is to review the list of employees and verify accuracy by signature and submitted to the Superintendent by November 28, 2016.
- c. The Superintendent is to review the submitted lists and in turn share with the Chief Finance Officer to prepare for payment.
- d. The Chief Finance Officer is to prepare payment to be distributed in December 2016.

# Avery County Merit Based Bonus Proposal

# MERIT-BASED BONUSES PLAN –Board Approved on November 8, 2016

The board will award one-time merit-based bonuses to eligible employees in December, 2016 in accordance with the plan outlined here and North Carolina Session Law 2016-94, section 36.1A. To be consistent with law, the allocation of these one-time bonuses will not be across-the-board. The amount of bonus awarded will not be added to the employee's ongoing base salary and will not be considered compensation for retirement purposes.

A. ELIGIBILITY To be eligible for a one-time merit-based bonus, an employee must meet the requirements established below.

## 1. Position Requirements:

- a. Employees with permanent (full-time/part-time) positions which include permanent full-time employees who work a 10, or 11-month schedule. Employee must be a school based administrator, central office employee or non-certified employee.
- b. No funds are provided by the state for bonuses for locally-paid or federally-paid employees. All locally and federally paid employees in similar positions will be paid from local or federal funds. Teachers and instructional personnel who are paid on the teacher salary schedule are not eligible for the merit bonus.
- c. The compensation bonus does not apply to employees separated from State service prior to September 1, 2016 or to employees hired effective September 2, 2016 or later.
- d. Employees on paid or unpaid LOA effective September 1, 2016, are eligible for the compensation bonus.
- e. Bonuses for part time employees will be paid a pro rata amount according to the percentage of their employment.

## 2. Performance Requirements

### A. Attendance\*

- a. 0 to 5 Absences – 10 points
- b. 6 to 10 Absences – 5 points



c. 11 to 15 Absences – 2 points

B. Longevity

- a. 30+ Years – 15 points
- b. 25 to 30 Years – 12 points
- c. 20 to 24 Years – 10 points
- d. 15 to 19 Years – 8 points
- e. 10 to 14 years – 5 points
- f. 5 to 10 years – 2 points

C. School Growth

- a. Exceeds Growth – 10 points
- b. Made Growth – 5 points

D. School Grades

- a. A – 15 points
- b. B – 10 points
- c. C – 5 points

E. Number of Sub-Groups

- a. 7 or More – 10 points
- b. 5 or More – 5 points
- c. 3 or More – 2 points

- The maximum number of points would be divided into the total bonus funds available to determine the dollar equivalent per point. The total points per eligible employee would then be multiplied by the per point amount to determine total bonus.
- For staff not assigned to a school a system-wide average of school growth, school grades and sub-groups will be used to determine the points awarded.

\* Does not count holidays. The only absences that count will be on student days.

# Beaufort County Merit Based Bonus Proposal

---

---

## MERIT-BASED BONUSES

---

---

The board will award one-time merit-based bonuses to eligible employees in December, 2016 in accordance with the plan outlined here and North Carolina Session Law 2016-94, section 36.1A. To be consistent with law, the allocation of these one-time bonuses will not be across-the-board. The amount of bonus awarded will not be added to the employee's ongoing base salary and will not be considered compensation for retirement purposes.

### A. ELIGIBILITY

To be eligible for a one-time merit-based bonus, an employee must meet the requirements established below.

#### 1. Position Requirements

The Beaufort County School system merit pay plan would recognize successful work performance and service credit specific to Beaufort County Schools for our employees who work in the lowest paid positions in the system. It is a one-time bonus payment calculated based on job performance and their years of uninterrupted service since their last hire date. The pay amount will be prorated based on the total percentages of any/all jobs each employee holds. An employee can only receive one payment, regardless of how many positions they hold. To receive this merit pay, individuals must be employed in Beaufort County Schools as of December 1, 2016. Employees who transfer within the district during the payment month remain eligible for the bonus unless the transfer was a result of negative performance. The merit-based bonus does not apply to employees separated from Beaufort County Schools prior to December 1, 2016. Employees on worker's comp and/or other types of disability as well as leave without pay who are still considered "employed" may receive this merit pay.

Employees in our plan who **DO NOT** receive consideration include: teachers or anyone paid from the teacher salary scale, principals, assistant principals, central service administrators (superintendent, assistant superintendent, executive directors, directors, coordinators, lead teachers, etc), substitutes of any kind, after-school or special programs employees (even if they are classified).

Employees in our plan who **DO** receive consideration include: clerical, custodian, child nutrition, bus driver, bus monitor, transportation, teacher assistants (regular, EC, ISS, distance learning, personal care, etc), bookkeeper, maintenance, technology, powerschool operator, receptionist, and any other classified personnel not in after-school or special programs but that are full-time (permanent or temporary status) or part-time (permanent or temporary status) employees.

---

---

## 2. Performance Requirements

Those individuals who are under consideration for this one-time merit pay plan who are currently employed by the Beaufort County School System have by virtue of their continued employment been deemed at least “satisfactory” in their overall job performance and have then been grouped according to their service date since their last hire date as listed below and will receive the following payments:

Employees who have worked in BCS for 0-5 years will receive \$425.

Employees who have worked in BCS for 6-10 years will receive \$450.

Employees who have worked in BCS for 11-15 years will receive \$500.

Employees who have worked in BCS for 16-20 years will receive \$550.

Employees who have worked in BCS for 21 or more years will receive \$600.

### **B. AMOUNT OF BONUS**

The superintendent shall ensure that the total amount of funds awarded do not exceed the amount of funds provided by the state for the purpose of providing merit-based bonuses. Bonuses shall be allocated as follows:

Employees will be paid from funds according to their payroll assignment. Those paid from state funds will be paid from the state allotment for this merit pay. Those paid from federal, child nutrition, local, and other funds will be paid from those funds accordingly.



## Plan for Merit-Based Bonuses

*Board-Approved with Changes to the "Distribution" Section Noted in Blue  
November 2, 2016*

As a part of the 2016 Appropriations Act (HB 1030; Session Law 2016-94), the North Carolina General Assembly authorized funds for merit-based bonuses for state-funded personnel who are not educators (those paid from the "Teacher" salary scale.) Bertie County Schools was allotted \$57, 046 for this purpose.

### **Authorization of State-Funded Personnel/Merit-Based Bonuses (from HB 1030; Session Law 2016-94):**

SECTION 36.1A.(a) Funds for Merit-Based Bonuses. – Of the funds appropriated in this act from the General Fund and Highway Fund to the Compensation Bonus Reserves, nonrecurring funds for the 2016-2017 fiscal year are authorized generally to provide employing agencies with funds to award one-time merit-based bonuses to State-funded personnel in accordance with eligibility policies adopted by the employing agencies. The eligibility policy shall not provide an across-the-board bonus for this purpose. Notwithstanding G.S. 135-1(7a) and G.S. 135-53(5), merit-based bonuses awarded under this Part are not compensation under Chapter 135 of the General Statutes.

SECTION 36.1A.(b) Employing Agency. – For the purposes of this Part, "employing agency" includes the following entities employing State-funded personnel:

- (1) The State Human Resources Commission, for executive branch departments with respect to both EHRA and SHRA employees, except University of North Carolina EHRA employees.
- (2) The Administrative Office of the Courts and the Commission on Indigent Defense Services, for the judicial branch.
- (3) The Legislative Services Commission, for the legislative branch.
- (4) The Board of Governors of The University of North Carolina, except as to its SHRA employees.
- (5) The State Board of Community Colleges, for the North Carolina Community College System.
- (6) Each local board of education, for school-based administrators, central office, and noncertified personnel. Educators are not eligible.

SECTION 36.1A.(c) Reporting. – Each local board of education shall provide to the Department of Public Instruction (DPI) the details of how these funds are distributed by district and school. All other employing agencies, and DPI, shall report to the chairs of the Senate Appropriations/Base Budget Committee and the House of Representatives Committee on Appropriations and the Fiscal Research Division on the use of these funds by no later than February 1, 2017.

### **Regulations:**

Each individual LEA was then charged with creating a procedure within the regulations of the legislation by which these funds would be distributed.

- Must have a plan approved by the Board of Education (Our plan will be submitted at November Board Meeting.)
- The bonus must not be distributed across-the-board.
- It must not be paid to certified teachers or instructional support staff members.
- It must be paid to state-funded personnel only from the allotted state funds.
- It is not subject to retirement.
- It is a one-time payment (non-recurring).
- It can be paid at any time during the 2016-2017 school year.
- A report must be submitted to DPI by December 1 stating how the bonus will be distributed.

**Proposed Plan:**

1. **Selected Groups:** Of the eligible groups of non-educators, Bertie County Schools identified the following groups to participate in this process:
  - School-Based Administrators (11)
  - Custodians (21)
  - Child Nutrition Staff Members (38)
  - Transportation Mechanics (5)
  - Bus Drivers (62)
  - Bus Monitors (4)(Total: 141 Selected Employees)
  
2. **Additional Eligibility Requirements:** Employees within the selected groups must also meet these additional eligibility requirements:
  - Must have been hired on or before January 1, 2016 and have a 2015-2016 performance evaluation rating of “Meets Expectations” or “Exceeds Expectations.”
  - Must have at least six months of cumulative employment.
  - Must not be facing active disciplinary action as of October 1, 2016.
  
3. **Amount of Bonus:** The specific bonus amount(s) will be based on the performance levels of the eligible employees.
  
4. **Distribution:** Note that the actual amounts are based on the specific number of employees rated by their supervisors for each performance level (Meeting Expectations/Exceeding Expectations).
  - **School-Based Administrators:** Tiered amounts for exceeding and meeting expectations. (Exceeding Expectations: \$1500. Meeting Expectations: \$1000.)
  
  - **Other Selected Groups:** Tiered amounts for transportation mechanics, child nutrition staff members, custodians, bus drivers, and bus monitors.
    - a. Those who are exceeding expectations will receive a flat amount (\$850).
    - b. Those who are meeting expectations will receive a different flat amount (\$575).
    - c. Those who are needing improvement/unsatisfactory performance will not receive a bonus.



## Timeline for Merit-Based Bonuses

*(Revised 11/4/2016)*

September 28, 2016: Initial meeting with Central Office Directors to discuss the requirements concerning merit-based bonuses and to identify specific groups of employees to participate.

October 20, 2016: Proposed plan, timeline, and related documentation sent to Central Office Directors for review.

October 26, 2016: Second meeting with Central Office Directors to discuss and amend (if necessary) proposed plan and to select distribution option.

October 27, 2016: Proposed plan presented at Principals' PD Meeting. Principal recommendations incorporated into proposed plan.

October 28, 2016: Proposed plan submitted to Board Clerk to send in Board packet.

November 1, 2016: Proposed Merit-Based Bonus plan will be submitted to the Board of Education for approval.

November 2-7, 2016: Schedule meetings with specified groups and send all employees in those groups a letter explaining the merit-based bonus plan and stating the date and time of each group's meeting.

Weeks of November 7-10 and 14-18, 2016: Separate meetings with each specified group will be conducted by HR and the group's immediate supervisor to explain the Board-approved merit-based bonus plan.

Week of November 21-22, 2016: A copy of the matrix will be sent to each supervisor for each eligible employee for completion. These forms will be due back to HR no later than December 2, 2016 at 5:00pm.

December 1, 2016: Submit a report to DPI stating how the bonus will be distributed.

December 2, 2016; 5:00pm: Matrix forms due back to HR. **Employees for whom forms are not received by the deadline will not be eligible for the merit-based bonus.**

Week of December 5-9, 2016: HR will use the information contained in the matrix forms to determine which employees will receive the merit-based bonus and how much each will receive. All of the state-allotted funding (\$57,046) received in October 2016 from DPI will be utilized in its entirety for this purpose.

Week of January 3-6, 2017: Employees who will receive the merit-based bonus will receive a letter stating the amount of the bonus.

January 2017 (Actual Pay Date to be Determined by Finance): Merit-based bonus to be paid to selected employees.



# BERTIE COUNTY SCHOOLS

## Approved Matrix for Merit-Based Bonuses

### *School-Based Administrators*

Directions: For each eligible employee, mark the box which most correctly identifies the level to which the employee meets the criteria listed during the 2015-2016 school year.

Name: \_\_\_\_\_

<u>Criteria</u>	<u>Exceeds Expectations</u>	<u>Meets Expectations</u>	<u>Does Not Meet Expectations</u>
<b>Student Growth</b>	Exceeded Expected Growth (2 Points)	Met Expected Growth (1 Point)	Did Not Meet Expected Growth (0 Points)
<b>Personnel Evaluation Data: Standard I</b>	Accomplished or Distinguished (2 Points)	Proficient (1 Point)	Not Demonstrated or Developing (0 Points)
<b>Personnel Evaluation Data: Standard II</b>	Accomplished or Distinguished (2 Points)	Proficient (1 Point)	Not Demonstrated or Developing (0 Points)
<b>Personnel Evaluation Data: Standard III</b>	Accomplished or Distinguished (2 Points)	Proficient (1 Point)	Not Demonstrated or Developing (0 Points)
<b>Personnel Evaluation Data: Standard IV</b>	Accomplished or Distinguished (2 Points)	Proficient (1 Point)	Not Demonstrated or Developing (0 Points)
<b>Personnel Evaluation Data: Standard V</b>	Accomplished or Distinguished (2 Points)	Proficient (1 Point)	Not Demonstrated or Developing (0 Points)
<b>Personnel Evaluation Data: Standard VI</b>	Accomplished or Distinguished (2 Points)	Proficient (1 Point)	Not Demonstrated or Developing (0 Points)
<b>Personnel Evaluation Data: Standard VII</b>	Accomplished or Distinguished (2 Points)	Proficient (1 Point)	Not Demonstrated or Developing (0 Points)
<b>Total Years of Experience in Education: _____</b>  <b>Total Years of Experience as a School-Based Administrator (Principal/Asst. Principal): _____</b>	15+ (2 Points)	10-14 (1 Point)	0-9 (0 Points)
<b>Total Points Earned:</b>			

Bonus Amount Key:

15-18 Points = Full Bonus

9-14 Points = Partial Bonus

0-8 Points = No Bonus

Supervisor Verification Signature: \_\_\_\_\_ Date: \_\_\_\_\_

**Received by Human Resources Department**

Date: \_\_\_\_\_ Time: \_\_\_\_\_ Signature of HR Rep: \_\_\_\_\_





# BERTIE COUNTY SCHOOLS

## Approved Matrix for Merit-Based Bonuses

*Custodians, Transportation Mechanics, & Child Nutrition Staff*

Directions: For each eligible employee, mark the box which most correctly identifies the level to which the employee met the criteria listed during the 2015-2016 school year.

Name: \_\_\_\_\_

Position: \_\_\_\_\_ Site: \_\_\_\_\_

Criteria	Exceeds Expectations	Meets Expectations	Does Not Meet Expectations
<b>Attendance</b>	Absent 0-4 Days (2 Points)	Absent 5-10 Days (1 Point)	Absent 11+ Days (0 Points)
	<u>Note:</u> Absences based on sick leave and leave without pay. Does not include absences from Family/Medical Leave, Short-Term Disability, or Workers' Compensation.		
<b>Performance Evaluation: Knowledge of Job</b>	Exceeds Expectations on at least one of the elements (2 Points)	Meets Expectations on one or both of the elements (1 Point)	Needs Improvement or Unsatisfactory Performance on any Element (0 Points)
<b>Performance Evaluation: Job Performance</b>	Exceeds Expectations on at least five of the eight elements (2 Points)	Meets Expectations on all elements or Exceeds Expectations on up to 4 elements (1 Point)	Needs Improvement or Unsatisfactory Performance on any Element (0 Points)
<b>Performance Evaluation: Dependability</b>	Exceeds Expectations on at least two of the three elements (2 Points)	Meets Expectations on all elements or Exceeds Expectations on one element (1 Point)	Needs Improvement or Unsatisfactory Performance on any Element (0 Points)
<b>Performance Evaluation: Workplace Performance</b>	Exceeds Expectations on at least three of the five elements (2 Points)	Meets Expectations on all elements or Exceeds Expectations on up to two elements (1 Point)	Needs Improvement or Unsatisfactory Performance on any Element (0 Points)
<b>Total Points Earned:</b>			

Bonus Amount Key:

10 Points = Full Bonus

5-9 Points = Partial Bonus

0-4 Points = No Bonus

Supervisor Verification Signature: \_\_\_\_\_ Date: \_\_\_\_\_

**Received by Human Resources Department**

Date: \_\_\_\_\_ Time: \_\_\_\_\_ Signature of HR Rep: \_\_\_\_\_



# BERTIE COUNTY SCHOOLS

## Approved Matrix for Merit-Based Bonuses

*Bus Drivers & Bus Monitors*

Directions: For each eligible employee, mark the box which most correctly identifies the level to which the employee met the criteria listed during the 2015-2016 school year.

Name: \_\_\_\_\_

Position: \_\_\_\_\_ Site: \_\_\_\_\_

Criteria	Exceeds Expectations	Meets Expectations	Does Not Meet Expectations
<b>Attendance</b>	Absent 0-4 Days (2 Points)	Absent 5-10 Days (1 Point)	Absent 11+ Days (0 Points)
	<u>Note:</u> Absences based on sick leave and leave without pay. Does not include absences from Family/Medical Leave, Short-Term Disability, or Workers' Compensation.		
<b>Years of Experience (as of July 1, 2016)</b>	15 Years or More (2 Points)	10-14 Years (1 Point)	9 Years or Fewer (0 Points)
<b>Total Points Earned:</b>			

Bonus Amount Key:

4 Points = Full Bonus

2-3 Points = Partial Bonus

0-1 Points = No Bonus

Supervisor Verification Signature: \_\_\_\_\_ Date: \_\_\_\_\_

Received by Human Resources Department

Date: \_\_\_\_\_ Time: \_\_\_\_\_ Signature of HR Rep: \_\_\_\_\_

Bladen County Schools



# Merit-Based Bonus Plan

2016-2017

November 16, 2016 Approved by Local Board of Education

**Bladen County Schools**  
**2016-2017**  
**Merit-Based Bonus Plan**

**Criteria One:** Eligible employees will be deemed as **full-time or part-time permanent employees who work 20 or more hours** in the following categories. A base amount will be assigned to each designated category based on the state allotment. **(Per legislation, the merit-based bonus shall not be used for across-the-board allocation).**

**Eligible employees:**

Principals  
Assistant Principals  
District Office Administrators  
Clerical Staff (Schools, District Office and other departments)  
Teacher Assistants  
Custodians  
Maintenance Staff  
Transportation Staff  
Technology Staff  
Child Nutrition Staff  
Bus Drivers/Monitors  
Behavioral Support Specialists

**Non-Eligible employees:**

Any staff member who is paid on the teacher salary schedule. Educators are not eligible.

**Criteria Two:** Eligible employees will be deemed as being employed in Bladen County Schools prior to July 1, 2016 in an eligible position **and** remaining in employment in an eligible position with Bladen County Schools on September 1, 2016 without a break in service.

**Criteria Three:** Eligible employees will be added additional dollars to the base amount based on evaluation results from the 2015-2016 evaluation instrument. Employees who were employed two or more months with Bladen County Schools during the 2015-2016 school year **and** who had a completed evaluation that is rated **above** “below standard”; “unsatisfactory”, “below performance”, “careless with frequent errors”, “below expectations” or “developing” will be eligible for the evaluation credit.

**Criteria for Bus Drivers or Monitors:** Eligible Bus Drivers or Monitors will be deemed as drivers or monitors who drive or monitor students **20 hours or more per week**. Drivers or monitors will receive experience credit pay based on their designated step pay grade. Bus Drivers or monitors, who work as Dual Employees, will receive only the designated dollars for their step pay grade and not receive the base amount for driving the bus or serving as monitor.

### Merit Pay Amounts to Award

Eligible Category (Personnel)	Minimum Payment	Maximum Payment
Principals	314.00	389.00
Assistant Principals	300.00	350.00
District Office Administrators	350.00	375.00
Clerical Staff (Schools, District Office and other departments)	450.00	475.00
Teacher Assistants	400.00	475.00
Custodians	400.00	475.00
Maintenance Staff	425.00	475.00
Transportation Staff	450.00	475.00
Technology Staff	400.00	450.00
Child Nutrition Staff	425.00	475.00
Bus Drivers/Monitors	25.00	325.00
Behavioral Support Specialist	400.00	400.00

**Merit Pay Bonuses will be paid to Bladen County Employees on January 13, 2017.**

## Special Conditions

### **New Hires**

Employees hired after July 1, 2016 are **not eligible** for the Merit Pay Bonus.

### **Leave of Absence**

Employees on a Leave of Absence (regardless of type) who have at least six months of cumulative work during the 2015-2016 school year **and** have a completed evaluation instrument on file in the personnel office **are eligible** for the Merit Pay Bonus.

### **Break in Service**

Employees, who separate from State service with a break in service during the 2015-2016 school year, **are not eligible** for the Merit Pay Bonus.



## Brunswick County Schools School Based Administrator and Classified Personnel Merit Pay Plan

### What is the Merit Based Bonus for non educators?

In accordance with HB 1030-36.1A, this bonus is awarded to school based administrators and non-certified (classified) personnel. The award is based solely on merit and cannot be paid "across the board" to all employees. Teachers and instructional personnel who are paid on the teacher salary schedule are not eligible for the merit bonus. Meritorious service to Brunswick County Schools includes going above and beyond what is expected, high performance, and demonstrating continuous improvement in respective job roles. The award is based on data from the 2015-2016 school year.

### Plan Criteria

There are three parts to the plan--School Based Administrators, Dual Employed Staff, and Classified Staff.

#### School Based Administrators

Administrators (Principals and Asst. Principals) whose schools demonstrated a gain in their academic growth index for the 2015-2016 school year would be eligible to receive the merit bonus. Principals would receive \$2,000 and Assistant Principals would receive \$1,500. Must have been employed with BCS since January 2016 and presently employed.

#### Dual Employed Bus Drivers

All Dual employed staff members automatically receive the merit bonus award. This includes teacher assistants, custodians, and Child Nutrition employees, and clerical staff who additionally drive a regular bus route. These employees do a tremendous service to our school system by performing their jobs and alleviating a shortage in bus drivers. Must have been dual employed since January 2016 and currently dual employed. They will receive \$1,000.

#### Classified Staff

Any Brunswick County Schools employees may nominate a classified employee that exhibits at least two of the following attributes so that their job performance consistently exceeded job requirements and regularly produced superior results:



Outstanding Customer Service  
Excellent Teamwork and Collaboration  
Professional Development  
Superior Results/Productivity  
Outstanding Leadership

Classified employees such as clerical (secretaries and administrative assistants), Operations Department staff, custodial staff and central services (excluding cabinet and directors) staff, and Instructional Assistants (TAs) are eligible. Employees must be clear of any work related warning or reprimand for the 2015-2016 school year to be eligible. Nominations forms (attached) must be submitted to Dr. Jerry Oates by November 30. Human Resources will distribute nominations to the nominated employee's supervisor for completion of a Performance Rating Rubric based on the criteria outlined in the nomination form. All nominations and completed rubrics will be reviewed and ranked by a committee of school based and central office based administrators. The committee will complete a ranking of all nominated employees. Awards of \$500 will be given as funding allows and will be paid based on ranking from the rubrics.

*\* Bus drivers/monitors and Child Nutrition employees are excluded as they have their own departmental incentive plans.*

*\* Must have been employed with BCS since January 2016 and presently employed.*

The total budget for this plan is \$200,000.

### **TIMELINE**

**November 15**--Present to Board (request for approval)

**November 30**--Nominations due to Dr. Oates

**December 5**--Nominations distributed to appropriate supervisors to complete rubric

**December 12**--Rubrics returned to HR

**December 14**--Committee ranking of nominated employees based on rubric results

**January 2017**--Awards paid

### **Merit Bonus Committee Members**

Rhonda Benton

Freyja Cahill

Mike Hobbs

Jerry Oates





Sue Rutledge  
Les Tubb

# Buncombe County Merit Based Bonus Proposal

## **MERIT-BASED BONUS PLAN**

In accordance with Session Law 2016-94, sec. 36.1A adopted by the NC General Assembly, the Buncombe County Board of Education will award one time merit-based bonuses to eligible employees in January of 2017. A committee convened by the Finance and Human Resources Departments have recommended a plan that is outlined below. To be consistent with law, the allocation of these one-time bonuses will not be across the board and will not be considered compensation for retirement purposes.

**A. Eligibility** – to be eligible for a one-time merit-based bonus, an employee must meet the following requirements:

**1. Position Requirements:**

- **Must be in a permanent clerical or custodial position**
- **Must be paid on the lowest pay scales between paygrades 50 & 59**
- **Must have been employed as of August of 2015**
- **Must be employed at the time the bonuses are paid in a qualifying clerical or custodial position**
- **Must have been continuously employed in a clerical or custodial position since August of 2015**
- **Must be paid with state funds or eligible to be paid with state funds**

**2. Performance Requirements:** In order to be eligible to receive the bonus, an employee must have received satisfactory or higher ratings on the 2015-16 performance evaluation. These employees must not have been subject to any formal disciplinary action. Formal disciplinary action is defined as a suspension from employment or an official letter of reprimand.

**3. Attendance:** Because the school system is not able to obtain substitutes for all classifications of employees, employee attendance is very important to the efficient operation of the school system. For this reason, employee attendance will be a factor in awarding merit-based bonuses in that employees with fewer absences will receive a higher percentage bonus.

To determine attendance rates, absence information for the 2015-16 school term will be considered (August 19, 2015 - June 8, 2016). Absences considered will include all sick leave, annual leave and leave without pay; however, for 10 month employees, annual leave on mandatory annual leave days will not be taken into account. Absences caused by a workers' compensation injury or extended leave taken pursuant to the Family and Medical Leave Act shall **not** count against an employee for the purpose of determining the amount of bonus received. If the application of this attendance criteria causes an extraordinarily unfair/unjust situation, a principal may file a hardship request with the Superintendent's staff.

**B. Amount of Bonus** – The Superintendent and staff shall ensure that the total amount of funds awarded will not exceed the amount of funds provided by the state for the purpose of providing merit-based bonuses.

Employee bonuses shall be a percentage of the employee’s gross pay in a qualifying clerical or custodial position. Employees with split assignments will only receive the bonus on the portion of their pay that is for duties performed in the clerical or custodial position.

Employees who have 4 or fewer absences in the 2015-16 school year shall receive a bonus payment of 6%. Employees with more than 4 but fewer than 11 absences shall receive a bonus payment of 5% and employees with 11 or more absences shall receive a bonus payment of 1%. Please see the document below.

Absences (SL, AL, LWOP)	# of Employees	Scenario #1	Gross Min	Gross Max	Average
0-4 days	66	6% of gross annual base pay	\$276.09	\$2,121.85	\$1,339.85
5-10 days	98	5% of gross annual base pay	\$125.64	\$1,608.80	\$1,038.13
11+	<u>151</u>	1% of gross annual base pay	\$49.62	\$353.64	\$208.43
Total	315	Total Cost \$239,044.83			
Notes: Total Budget = \$248,561					
Leaving a small cushion to cover bases; will tweak percentages once verifications have been made					
0-4 days	-Min = 2hr Custodian	Max = 12 month Elementary Secretary/Treas/PS			
5-10 days	- Min = 1 hr Custodian	Max = 12 month Head Secretary			
11+ days	- Min = 2 hr Clerical Asst	Max = 12 month Information Specialist			



ASHEVILLE CITY SCHOOLS

Learn. Discover. Thrive.



## Merit Pay Plan

Joyce Graves, Executive Director of Human Resources • Charlotte Sullivan, Executive Director of Finance



## Legislation States:

One time bonus to **state-funded** personnel in accordance with eligibility policies adopted by the employing agencies. The eligibility policy shall not provide an across the board bonus.

- Distribution determined by a locally approved plan by the district Board of Education
- Non educators eligible-excludes teachers and certified instructional support personnel
- Non recurring bonus not subjected to Retirement
- DPI has to report the distribution and details to General Assembly by February 1, 2017
- Local LEA's are required to have approved Merit Pay Plan submitted to DPI by December 15, 2016



# Merit Pay Plan Criteria

- Must be a permanent full-time employee who work a 10 month, 11 month, or 12 month schedule
- Must have been employed with Asheville City School as of July 1, 2015
- Employees must not have a break in service from Asheville City Schools since July 1, 2015
- Employees must remain employed at the time the merit pay is issued (January 2017)
- Employees who have not been on an Action Plan since July 1, 2015 to June 30, 2016



ASHEVILLE CITY SCHOOLS

Learn. Discover. Thrive.

# Employee Categories

**The following employee categories have been recommended to receive the Merit Bonus:**

- Child Nutrition Staff
- Custodial Staff
- Instructional Assistants (to include Media and ISS assistants)





**State Allotment = \$43,792.00**

**Each employee will receive a one time merit bonus of \$700.00**

Positions	Source of Funds
Child Nutrition	Child Nutrition
Custodians	State & Local
Instructional Assistants	State & Local



ASHEVILLE CITY SCHOOLS

Learn. Discover. Thrive.

## Recommendation/Approval

We are requesting approval  
from the Asheville City  
Schools Board of Education  
for the Merit Pay Plan.

Approved 12/7/2016 as  
presented.



# BURKE COUNTY Public Schools

Igniting Learning For A Brighter Future

---

---

## MERIT-BASED BONUSES

---

---

The Burke County Board of Education will award one-time merit-based bonuses to eligible employees in November, 2016 in accordance with the plan outlined here and North Carolina Session Law 2016-94, section 36.1A.

The Burke County Board of Education understands:

- To be consistent with law, the allocation of these one-time bonuses will not be across-the-board.
- The amount of bonus awarded will not be added to the employee's ongoing base salary and will not be considered compensation for retirement purposes.

### A. ELIGIBILITY

To be eligible for a one-time merit-based bonus, an employee must meet the requirements established below.

#### 1. Position Requirements

Principals and assistant principals who were employed full time in 2015-2016 school year and who are still currently employed full time with Burke County Public Schools will be eligible for a one time merit bonus based in accordance with S.L. 2016-94, sec. 36.1A. Any employees who retired, resigned, or took a leave of absence during the 2015-2016 school year are not eligible for a one-time merit-based bonus.

#### 2. Performance Requirements

1. Meets growth
2. Meets High growth
3. School Performance grade of C or better
4. Evaluation Proficient or better
5. Based on student enrollment numbers of school
6. Will be based on the school in which principal was assigned for majority of days
7. Any employees who retired, resigned, or took a leave of absence during the 2015-2016 school year are not eligible for a one-time merit-based bonus.

---

---

### Office of the Superintendent

700 East Parker Road / PO Drawer 989, Morganton, NC 28680  
Phone: 828-439-4312 Fax: 828-439-4314 [www.burke.k12.nc.us](http://www.burke.k12.nc.us)



# BURKE COUNTY

## Public Schools

Igniting Learning For A Brighter Future

---

### B. AMOUNT OF BONUS

The total amount of \$171,761.00 was distributed to assistant principals and principals, who met the merit based criteria. Bonuses shall be allocated as follows:

Measurables used in the distribution of the merit-based bonus are as follows.

- NC School Executive's evaluation: Proficient or greater-1 point
- Meets Growth – 1 point
- Exceeds Growth – 1 point
- Proficiency
  - >50<70 – 1 point
  - >69<80 – 1 point
  - >79<90 – 1 point
  - >90 – 1 point
- School Grade
  - C – 1 point
  - B – 1 point
  - A – 1 point

Points are cumulative.

The points are tallied and converted to a % and that eligible percentage is then weighted based on ADM at each school location.

The total amount of funds awarded, \$171,761.00, does not exceed the amount of funds provided by the state for the purpose of providing merit-based bonuses.

A handwritten signature in black ink, appearing to read "Randy Burns", written over a horizontal line.

Randy Burns, Board Chair

A handwritten signature in black ink, appearing to read "Larry Putnam", written over a horizontal line.

Larry Putnam, Superintendent

---

### Office of the Superintendent

700 East Parker Road / PO Drawer 989, Morganton, NC 28680  
Phone: 828-439-4312 Fax: 828-439-4314 [www.burke.k12.nc.us](http://www.burke.k12.nc.us)

### **Merit Pay Bonus for Non Educators**

Merit based bonuses for non-educators, including school based administrators, central office and non-certified personnel were approved in the 2016-2017 budget. Educators are not eligible. LEA's shall provide to DPI details of how these funds are distributed by district and school. The plan is due to DPI by December 20<sup>th</sup>. (Source: *DPI summary of special provisions and money report*)

### **Legislated Restrictions**

LEAs shall adhere to the following per the legislation

- the local board will adopt a plan as to how to award the bonuses
- the bonuses shall not pay the bonus as an across the board bonus
- only state funded personnel are eligible for a bonus from the State funds
- the bonus is not subject to retirement
- the bonus is one-time payment (non recurring)

Staff who are paid from other funds (non-state) will receive their bonus from the appropriate fund. Example: SNP staff bonuses are paid from the SNP fund.

### **Merit Pay**

Merit pay is an approach to compensation that rewards higher performing employees with additional pay or incentive pay. Merit pay has advantages and disadvantages for both the employees and the employer.

But, all-in-all, merit pay is the best way to reward the employees you most want to keep. **Merit pay sends a powerful message** about employee efforts and contributions you want to recognize and reward.

### **Recommended Plan for Merit eligibility (approved by BOE 11.7.16)**

2015 – 2016 evaluations and current performance are the parameters used to become eligible for the merit bonus.

- Must be employed as of January 4, 2016 (must have an evaluation)
- Employee must be proficient or higher in all categories/standards
- **AND**
- No discipline letters, memos, action plans (July 1, 2015 to present)

#### Separation/ New Hires

- Must be employed by Cabarrus County Schools when the bonus is paid (December 27, 2016)
- The compensation bonus does not apply to employees separated from state service.
- Retirement is considered separation from service.
- Does not apply to employees hired effective January 5, 2016 or later.

#### Disciplinary Actions

- Employees with a disciplinary action are not eligible (July 2015 through present)

#### Employment Status

- Employees hired on or before January 4, 2016 and who have FY2015 -2016 performance plan with proficient or higher in all categories/standards with a minimum of 1 area above standard are eligible.

#### **How much is the bonus?**

Cabarrus County Schools received a state allocation for state employees in the amount of \$376,725. Eligible employees will received \$500 if full time. Part-time eligible employees will receive a prorated share.

State funds will be maximized and additional funds will be allocated from fund balance.

#### **Questions and Answers (Q&A's)**

##### ***1. Are teachers and instructional support eligible?***

No. Any teacher or instructional support who is paid from the certified educator salary schedules is not eligible. This includes but not limited to teachers, school counselors, psychologists, nurses, audiologists, speech language pathologists, media coordinators, social workers etc.

##### ***2. Are contracted personnel eligible for the bonus?***

No, an individual must be employed in a permanent position. Short term assignments, tutors and non-benefit earning positions are examples of those who would not qualify.

##### ***3. Do employees who are employed less than 20 hours per week receive a pro rata amount of the bonus?***

No, these employees, by definition, are considered temporary.

##### ***4. If an employee is employed after January 4, 2016, do they receive a pro rata share of the bonus?***

No.

**5. If an employee has an effective retirement day of January 4, 2016, are they eligible?**

No.

**6. If an employee has an effective retirement day of December 27, 2016, are they eligible?**

Yes.

**7. Are school based administrators eligible for the bonus?**

Yes. Both assistant principals and principals are eligible.

**8. Are MSA and Principal Fellows eligible?**

No.

**9. If the school based administrator is paid from the teacher salary schedule is he/she eligible for the bonus?**

Yes. Only teachers and instructional support are excluded.

**10. Do probationary employees get the bonus?**

Yes, probationary employees are eligible, provided they meet the criteria above.

**11. Are employees on leave without pay eligible for the bonus?**

Yes, employees on leave without pay receive the bonus, provided they meet the criteria above.

**12. Are employees on worker's compensation eligible for the bonus?**

Yes, they receive the bonus, provided they meet the criteria above.

**13. What if the employee is on sick leave or some other extended absence?**

Yes, they receive the bonus, provided they meet the criteria above.

**14. Do employees who are on short term or long term disability receive the bonus?**

Employees on short term disability are eligible for the bonus, provided they meet the criteria above. Employees on long term disability are NOT eligible.

**15. Are locally funded employees eligible for the bonus?**

The legislation provides the bonus to those persons employed in a permanent State funded position. Therefore, there are no state funds for persons employed in local funded positions. The local board of education has requested and received funds from the county to pay locally paid staff bonuses, provided they meet the criteria above.

***16. Are federally funded employees eligible for the bonus?***

Yes. The legislation provides the bonus to those persons employed in a permanent state funded position. Therefore, there are no state funds for persons employed in federally funded positions. These individuals shall be paid the bonus from the same federal funds as their regular salary, provided they meet the criteria above.

***17. Are part time employees eligible?***

Yes, part time employees are eligible for a pro rata amount provided they meet the criteria above. These employees must be in a permanent status earning benefits (20 plus hours per week).

**PAYMENT AND CODING**

***18. How will the bonus be paid?***

It will be paid on December 27, 2016 as a lump sum payment separate from the regular pay.

***19. If the employee is split funded between State and local, who pays?***

The State will pay for the percentage of State employment. The local fund is responsible for the remainder.

**OTHER**

***20. Is the bonus subject to an employee's longevity payment?***

No. This is a bonus payment, not salary and therefore not included when calculating the longevity payment.

***21. Is the bonus subject to retirement withholding and matching?***

No, the bonus is not considered compensation for retirement purposes and is NOT subject to retirement.

***22. Is the bonus subject to taxes?***

Yes, the bonus is considered income and is subject to applicable taxes.



# Kannapolis City Merit Based Bonus Proposal



## Merit-Based Bonus Pay October 2016

Session Law 2016-94 authorizes a one-time merit-based bonus for school-based administrators, central office and non-certified personnel.

### **STATE-FUNDED PERSONNEL/MERIT-BASED BONUSES AUTHORIZED**

*SECTION 36.1A.(a) Funds for Merit-Based Bonuses. – Of the funds appropriated in this act from the General Fund and Highway Fund to the Compensation Bonus Reserves, nonrecurring funds for the 2016-2017 fiscal year are authorized generally to provide employing agencies with funds to award one-time merit-based bonuses to State-funded personnel in accordance with eligibility policies adopted by the employing agencies. The eligibility policy shall not provide an across-the-board bonus for this purpose. Notwithstanding G.S. 135-1(7a) and G.S. 135-53(5), merit-based bonuses awarded under this Part are not compensation under Chapter 135 of the General Statutes.*

Kannapolis City Schools has chosen to determine eligibility based on current performance and evaluations.

Overall Current Performance & Evaluation		
Distinguished	Proficient	Developing
100%	80%	50%

Each member who is evaluated at an overall rating of **“Distinguished”** will receive **100%** of the potential pro-rated portion of funds available.

Each member who is evaluated at an overall rating of **“Proficient”** will receive **80%** of the potential pro-rated portion of funds available.

Each member who is evaluated at an overall rating of **“Developing”** will receive **50%** of the potential pro-rated portion of funds available.

The Kannapolis City Schools non-certified evaluation instrument includes evaluation on the following categories: quantity of work, quality of work, job knowledge, customer relations, safe and clean work environment, attendance, initiative, job attitude, self-improvement, instructional capacity, knowledge of and ability to follow policies, goal achievement, growth, and protection of confidential information.

The certified school based administrator’s evaluation includes the following standards: strategic leadership, instructional leadership, cultural leadership, human resources leadership, managerial leadership, external development leadership and micro-political leadership.

# Caldwell County Schools

## Bonus Merit Pay Plan

### **Introduction:**

The State Board of Education approved allocations to each local school district to pay non-educators a one-time merit based bonus. Section 36A-1 of SL2016-94 requires each LEA to have an approved plan that determines the distribution of the bonuses based on criteria that establishes merit. The Caldwell County Board of Education supports the recognition of excellent performance and achievement through the use of this merit pay plan.

The Bonus Merit Pay Plan meets all established state requirements and rewards qualifying non-educator employees for their performance and achievements. The plan reflects the following principles:

1. The plan fairly and equitably recognizes eligible employees in areas that contribute to personal professional growth and school/district wide accomplishments and successes.
2. The plan is practical and timely.
3. The plan is creditable, objective and transparent.
4. The plan meets all state and local requirements.

### **District Eligibility Requirements:**

Non-educator employees are eligible for merit pay if:

- They are employed in a non-certified personnel or Administrator (school based and district level) position.
- They were employed for a minimum of 20 hours per week or as a bus driver or monitor (including substitute) on September 1, 2015 and remains in continuous employment as of February 1, 2017.
- There is no recorded disciplinary action or letters of reprimand in personnel file.
- They submit a completed application with rubric and appropriate documentation by the established deadline. (February 28, 2017) The application must be signed by immediate supervisor.
- They have not been placed on any type of Improvement Plan since September 1, 2015.

*Award Categories:*

Excellence in Education Recognition

1. Employee was/is enrolled in degree/advanced degree program with course of study that is relevant to education and has a minimum cumulative 3.0 GPA as of Spring Semester 2016 (5 points)
2. 1 point per 10-hour certification class (job related), up to a maximum of 30 hours (3 points)

Bus Driver

1. 1 – 10 years = 2 points
2. 11 – 15 years = 3 points
3. 16 – 20 years = 4 points
4. 21+ years = 5 points

Sub drivers – must have driven a minimum of 20 days or more during the 2015-2016 school year = 1 point

Extra Duty Assignments

- Regular bus monitors = 2 points,
- Other Assignments (Before or after school club advisors, dual employees, Associate Council Representative, after-hours emergency responder) =1 point

Of the Year School/Office Level Recognition

1 point

Of the Year District Recognition

3 points

State or National Recognition

5 points

Longevity in CCS

10 or more years with no break in service (off payroll) = 1 point

A point system will be used to determine bonus pay amount. Each point will equate to a designated dollar amount to be determined based on number of qualifying applicants. Bonus payments will be paid in April 2017.

## Merit Pay Bonus Allocation for Non Educators

### **I. Background:**

The State Board of Education approved the allocation method for the merit based bonus appropriated in SL 2016-94 Section 36.A1. Camden County School has received an allocation of \$37,692 for fiscal year 2016-17.

Each LEA must now have a locally approved plan that determines the distribution. The bonuses shall:

- Be distributed based on a locally approved plan
- Not be distributed across the board
- Not be paid to certified teacher or instructional support
- Be paid to state funded personnel only

Based on the total amount allocated by the state, the total amount available to each individual if they were to receive their full share would be approximately \$360.00. It is now the task of the Camden County Board of Education to develop and approve the plan for distribution.

### **II. Proposal:**

The Camden County Board of Education believes the every employee plays a valuable role in the overall function and service of the educational system. As such, and knowing the stipulation that there cannot be an across the board distribution of Merit Pay Bonus funds, the Board proposes the funds be distributed based on the following formula:

Employees identified to receive the Merit Pay Bonus, shall receive a full share in proportion to their percentage of time employment based on the following:

100% share if the employee meets all of the following:

- Has no rating below “At Standard” or Proficient” on any final rating as noted by their immediate supervisor for the 2015-2016 school year,
- Had no letter of reprimand placed into their personnel file during the 2015-2016 school year,
- Had an acceptable attendance record as indicated by their immediate supervisor during the 2015-2016 school year.

66% share if the employee meets 2 of 3 of the following:

- Has no rating below “At Standard” or Proficient” on any final rating as noted by their immediate supervisor for the 2015-2016 school year,
- Had no letter of reprimand placed into their personnel file during the 2015-2016 school year,
- Had an acceptable attendance record as indicated by their immediate supervisor during the 2015-2016

33% share if the employee meets 1 of 3 of the following:

- Has no rating below “At Standard” or Proficient” on any final rating as noted by their immediate supervisor for the 2015-2016 school year,
- Had no letter of reprimand placed into their personnel file during the 2015-2016 school year,
- Had an acceptable attendance record as indicated by their immediate supervisor during the 2015-2016

0% share if the employee meets 0 of 3 of the following:

- Has no rating below “At Standard” or Proficient” on any final rating as noted by their immediate supervisor for the 2015-2016 school year,
- Had no letter of reprimand placed into their personnel file during the 2015-2016 school year,
- Had an acceptable attendance record as indicated by their immediate supervisor during the 2015-2016

### **III. Suggested Timeline:**

September 2016 – Presentation to Board of Education for review, discussion and possible acceptance of Merit Pay Bonus Allocation plan.

Distribute the list of eligible employees to the immediate supervisors for their review and final recommendations.

October 2016 – Immediate supervisors return completed and signed recommendations to the Superintendent for final review who will in turn forward to the finance department.

November 2016 – Distribution of Merit Pay Bonus in the November check.

Note: Timeline adjusts one month the approval date by the Board

Merit-Based Bonus, continued for clarification as per September 9, 2016 memorandum from Paula Woodhouse, Interim State Human Resources Director and Andrew Heath, State Budget Director. This clarification is noted and necessary as the memorandum stating such requirements came after the Camden County Board of Education approved a Merit Pay Bonus Plan.

### **IV. Additional conditions as required for local policy:**

- a. Amounts – The amount each eligible employee shall receive shall be based on the percentage of employment as well as the overall performance as outlined in Section I
- b. Performance – Performance shall remain as outlined and approved as in Section II

- c. Timeline- timeline shall remain as outlined and approved as in Section III
- d. Special Conditions:
  - i. Only employees hired on or before January 1, 2016 or who have a FY 2015-2016 performance evaluation are eligible
  - ii. Employees who separate from State service with a break in service, are not eligible

**V. Review, Verification, and Payment**

- a. The Superintendent is to submit the names of eligible employees to each immediate supervisor for verification of performance rating, attendance and disciplinary record by September 23, 2016
- b. Each supervisor is to review the list of employees and return the completed form to the office of the Superintendent by October 7, 2016
- c. The Superintendent is to review the submitted lists and in turn share with the Chief Finance Officer to prepare for payment
- d. The Chief Finance Officer is to prepare payment to be distributed in the November check

# Camden County Merit Based Bonus Proposal



# MEMORANDUM

TO: Principals and Selected Directors/Supervisors  
FROM: Melvin Hawkins  
DATE: September 13, 2016  
RE: Merit Bonus Pay

As you are aware, SL 2016-94 Section 36.A1 calls for each LEA to approve a local plan to determine the distribution of funds for the Merit Pay Bonus for Non Educators. These funds are to be distributed based on a locally approved plan, they are not to be distributed across the board, they are not to be paid to certified teachers or instructional support, and they are to be paid to state funded personnel only. Attached is the full proposal that was reviewed, discussed and adopted by the Board.

The Camden County Board of Education approved a plan during their September 8, 2016 meeting that will distribute the funds based on staff members meeting three criteria. Remember, the information is based on the productivity from the 2015-2016 school year (July 1, 2015 – June 30, 2016).

Using the attached sheet(s):

- Place an X in the column if the employee did NOT have a rating that was “At Standard” or “Proficient.”
- Place an X in the column if the employee had a “negative” letter placed into their personnel file.
- Place an X in the column if the employee had an attendance record that you believed was less than acceptable.
- If there is an X marked, write a brief explanation for the rating. This may either be added to the bottom of the sheet or attached. If explanation is on a separate sheet, include your signature on that page.
- Leave all columns blank if the employee meets the acceptable rating in each category
- Sign and date the front page of the form and initial any additional page if applicable. Your signature and initials indicate the information you have provided is accurate to the best of your knowledge and is submitted without any attempt of deception.
- Return the form to me by October 7, 2016 for final review.

If you have questions, please contact me or Faye Perry immediately.

## Merit-Based Bonus 2016-2017

### Carteret County Public Schools LEA 160

The 2016 General Assembly ratified and Governor Pat McCrory signed into law HB 1030, which provides a one-time merit-based bonus.

Per the legislation the merit-based bonus shall not be used for across-the-board allocation. Teacher and instructional support personnel are not eligible to receive the merit-based bonus.

Criteria for the merit bonus are below.

- The merit-based bonus will be paid to non-certified employees with a formal and/or non-formal evaluation of satisfactory. The employees will also have five (5) or more years state service as of September 1, 2016. This includes office support personnel, teacher assistants, maintenance personnel, transportation personnel, and child nutrition employees.
- The merit-based bonus does not apply to employees separated from State service prior to the last day of the pay period for which payment is disbursed.
- If an eligible employee is on LOA during 2016-2017 and returns from the LOA on or before the June 30, 2017, the eligible employee will be paid the merit-based bonus.
- On December 16, 2016, all eligible employees will be paid a one-time \$800.00 merit-based bonus, not subject to retirement.

# Caswell County Merit Based Bonus Proposal

## Merit Based Pay / Bonus Pay from State Guidelines

1. No write up in file of principal, personnel, or superintendent office in order to be eligible for bonus.
2. Must be employed at least six-months from last school year and returned to work for the 2016-17 school year and be employed as of Nov. 1, 2016.
3. All bonus pro-rated based on daily hours worked of an 8-hour day. 7.5 hour permanent employees will be counted as a full 8-hour day.

### Attendance

- 4 points for no missed days
- 3 points = 1 - 5 missed days
- 2 points = 6 - 10 missed days
- 1 point = 11 - 15 missed days

### Years of Service

- 4 points = 16+
- 3 points = 11 - 15
- 2 points = 6 - 10
- 1 points = 1 - 5

Total Points for each eligible employee:

<b>Sample Scale</b>	
2 = \$100	
3 = \$150	
4 = \$200	
5 = \$250	
6 = \$300	
7 = \$350	
8 = \$400	

### NOTES:

1. Scale amount set after number of employees determined based on criteria.
2. Only individuals paid from State funds can be paid from money allocated by State. Other employees not on State (ex. Food Service, Bus Drivers, etc.) will be paid from local funds (current expense fund balance).

3. State bonus money is approximately \$45,000 if all employees paid from state and all paid evenly would be approximately \$200. We have approximately 220 employees who are to be considered.

## **Catawba County Schools**

### **Merit-Based Bonus Plan 2016-2017**

In accordance with the *North Carolina S.L. 2016-94, sec 36.1A*, all local boards of education must award employees who are in state-funded positions and who are non-educators a one-time merit-based bonus in accordance with the board's eligibility plan or policy.

This legislation further requires that local boards of education adhere to the following restrictions in establishing eligibility and awarding the bonuses:

- The local boards must adopt a plan setting forth the eligibility requirements for receiving the bonus, the date the bonus will be paid to eligible employees and the amount of the bonus for eligible employees; and
- The bonuses shall not be across the board bonuses; and
- Only state-funded personnel are eligible for a bonus from state funds; and
- The bonus cannot be subject to retirement; and
- The bonus must be a one-time payment

Catawba County Schools will pay the one-time merit-based bonus required by *North Carolina S.L. 2016-94, sec 36.1A* on January 6, 2017.

The amount of the bonus will be based on the role and performance for eligible employees.

Catawba County Board of Education values all of its employees and recognizes that they are loyal and hardworking; unfortunately, the State has only provided funding for merit bonuses for state funded positions and the district has limited local resources. Due to budget reductions to local education agencies beginning with the 2008-2009 school year, Catawba County Schools' non-instructional support staff has been subject to extreme reductions in the number of positions, as well as, days of employment. In addition, bus drivers and bus monitors are extremely difficult to staff due to the rates of pay and operating hours yet are vital to the effective operation of the district. Through the administration of this merit-based bonus plan, the board acknowledges the valuable contribution of the aforementioned employees, their willingness to serve and the sacrifices they have made.

The Catawba County Board of Education has determined that the following non-educator, state-funded employees who meet the following criteria are eligible for the one-time merit-based bonus required by *North Carolina S.L. 2016-94, sec 36.1A*

1. Eligible employees must be state-funded personnel; and
2. Eligible employees must be employed full- time with Catawba County Schools on December 1, 2016, and the employee must not have a break in service, leave of absence or separation from employment from December 1, 2016, through and including, January 6, 2017 (herein referred to as "eligible period"); and
3. Eligible employees must not have received any discipline, letter of warning, letter of reprimand, or memorandum of concern from July 1, 2016, through and including, January 6, 2017; and

4. Eligible employees must be employed in a non-instructional support position and their days of employment must have been reduced from 215 days to 205 days per year; or dual employees who are non-educators who monitor or drive a yellow school bus in addition to another non-certified job within the system.

The Catawba County Board of Education has determined that following eligible employees shall receive the one-time merit based bonus in the following amounts:

1. If the eligible employee is employed throughout the eligible period as a non-instructional support position and his/her days of employment have been reduced from 215 days to 205 days per year, he/she shall receive a \$300.00 bonus.
2. If the eligible employee is employed throughout the eligible period as a dual employee who is a non-educator and monitors or drives a yellow school bus only in the a.m. in addition to holding another non-certified job within the system, he or she shall receive a \$150.00 bonus.
3. If the eligible employee is employed throughout the eligible period as a dual employee who is a non-educator and monitors or drives a yellow school bus only in the p.m. in addition to holding another non-certified job within the system, he or she shall receive a \$150.00 bonus.
4. If the eligible employee is employed throughout the eligible period as a dual employee who is a non-educator and monitors or drives a yellow school bus in both the a.m. and p.m. in addition to holding another non-certified job within the system, he or she shall receive a \$300.00 bonus.
5. If the eligible employee is employed throughout the eligible period as a dual employee who is a non-educator and regularly substitutes as a yellow bus monitor or driver for at least an average of two (2) routes per week in addition to holding another non-certified job within the system, he or she shall receive a \$150.00 bonus.
6. Employees who are otherwise eligible but are paid from multiple funding sources, one of which is state funding, will be eligible for the applicable bonus. However, their bonus will be paid from funds proportionate to their source of funding.
7. These one-time merit-based bonuses shall be subject to FICA and applicable state and federal taxes, but will not be subject to retirement.

# Hickory Public Merit Based Bonus Proposal



# PRECIS

## BOARD MEETING AGENDA ITEM

### HICKORY PUBLIC SCHOOLS

TO: BOARD MEMBERS  
FROM: SUPERINTENDENT  
DATE: **November 28, 2016**  
SUBJECT: **Merit Based Bonus Plan for Hickory Public Schools**

STAFF LIAISON PERSON(S) PRESENT: **Superintendent**

CITIZEN(S) PRESENT:

PURPOSE:

**The Board is requested to approve a one-time merit-based bonus of \$930 for non-certified employees who meet the eligibility requirements outlined in the plan.**

MAIN POINTS:

**The total number of employees' eligible based on the above criteria is 98 with 50 being state funded. Therefore, the bonus amount equates to \$930 per employee. Employees paid from other funding sources (i.e., local, federal and child nutrition) will be paid the same bonus amount from their funding source.**

FISCAL IMPLICATIONS:

**Approximately \$50,154**

SUPERINTENDENT'S RECOMMENDATION:

**Approve one-time merit based bonus pay out as requested.**

---

FOR BOARD USE:

MOTION BY: Carson

SECONDED BY: Pope

APPROVED: ✓

DISAPPROVED: \_\_\_\_\_

NOTES ON ACTION:



## Merit Based Bonus Plan for Hickory Public Schools

### Background Information

The 2016 General Assembly approved a one-time merit-based bonus for non-educators employed in a state funded position. The bonus is non-recurring and cannot be used for across-the-board allocation. Teachers and instructional support staff paid on the teacher salary schedule are not eligible. The eligible employees with HPS include principals, assistant principals, central office and noncertified personnel. Legislation requires local boards of education approve a plan as to how to award the bonus. The plan must clearly outline eligibility requirements, amount to award, and payment date. The approved plan then must be submitted to DPI by December 1, 2016. Our state allotment for this bonus was \$50,154 with 222 employees eligible for the bonus.

We formed a committee with representation from the various job classifications eligible for the bonus to determine the criteria for awarding the bonus. The committee met on October 11, 2016, and determined the following eligibility requirements:

### Eligibility Requirements:

- Only non-certified employees (excludes central office administrators, principals and assistant principals)
- Permanent full/part-time employees
- Employed at least for 3 consecutive years with HPS as of June 30, 2016, except those that may have been RIF'd.
- No disciplinary actions currently or during the 15-16 school year.
- Have at least a 95% attendance rate for the days scheduled to work during 15-16 school year. Excluded in calculating attendance rate are scheduled vacation, funeral leave, jury duty and FMLA leave.
- Include non-certified employees that meet the criteria as above regardless of funding source.
- The amount of the bonus is a flat amount divided among those that meet the above criteria. The total number of employees eligible based on the above criteria is 98 with 50 being state funded. Therefore, the bonus amount equates to \$930 per employee. Employees paid from other funding sources (i.e., local, federal and child nutrition) will be paid the same bonus amount from their funding source.
- Payment Date: December 21, 2016

#### *Committee Members:*

Dr. Robbie Adell, Superintendent	Nala Sadler-Sherrill, Assistant Principal, HCAM
Maria Caliendo, Teacher Assistant, Longview	Mike Scott, Bus Driver
Cindy Clark, Secretary/Treasurer, Grandview	Tracy Sigmon, Personnel Officer
Stephanie Dischiavi, Principal, Northview	Adam Steele, Finance Officer
Shelley Hughes, Bus Driver/Child Nutrition, Grandview	Colette Surratt, Child Nutrition, Oakwood
Tina Pottorff, Child Nutrition Director	Tim Ward, Groundskeeper
Crystal Pritchett, NCAE Rep, Teacher, Northview	Jason White, Board Attorney
Ginger Robertson, Executive Assistant to Superintendent/Board Coordinator	

### **2016-2017 Merit Bonus Plan for Newton Conover City Schools**

- \*All classified employees will receive the merit bonus except for Central Office Administration, Principals, Assistant Principals, Child Nutrition Employees and Community Schools Employees.
- \*Employees must be employed as of January 1, 2016 to be eligible.
- \*Employees must be full time (at least 75%).
- \*All eligible employees will receive a base amount of \$500.
- \*Employees with 10-19.99 years of local service with Newton Conover City Schools through December 2016 will receive an additional amount of \$300.
- \*Employees with 20+ years of local service with Newton Conover City Schools through December 2016 will receive an additional amount of \$600.
- \*Employees with any disciplinary actions or action plans within the last two years are not eligible.
- \*The merit bonus will be paid on December 21, 2016.

## **Chatham County Schools Plan for Merit Based Pay**

Chatham County Schools presents the following plan for the State Legislated Merit Based Pay:

### **Eligible Employees for Merit Pay**

- Classified employees
- Principals, Assistant Principals, Executive Directors, Directors, Assistant Directors

### **Employee Criteria for Eligibility:**

- Employed full-time by 12/31/2016
- No clearly documented ongoing performance issue(s), including attendance.
- Employed full-time at the time of the merit bonus payout, which is scheduled for May 2017.

### **Payout based upon state service longevity:**

- 0-5 years - \$200
- 6-10 years - \$300
- 11-15 years - \$400
- 16-20 years - \$500
- 21-25 years - \$600
- 26+ years - \$700

# Cherokee County Merit Based Bonus Proposal

**A. ELIGIBILITY**

To be eligible for a one-time merit-based bonus, an employee must meet the requirements established below.

This policy is applicable only to the 2016/2017 school year.

**1. Position Requirements**

**State funds are provided only for state-funded employees who are school administrators, central office employees, or non-certified employees. Teachers and instructional personnel paid on the teacher salary schedule are not eligible.**

**2. Performance Requirements**

**In order to receive the Merit-Based Bonus in 2016-17 a qualifying state paid employee must have at least five years of experience in the Cherokee County School system and have received an at-standard evaluation or above on their most recent evaluation. Employees who received a below standard or received a letter of reprimand will not be eligible.**

**B. AMOUNT OF BONUS**

The superintendent shall ensure that the total amount of funds awarded do not exceed the amount of funds provided by the state for the purpose of providing merit-based bonuses. Bonuses shall be allocated as follows:

**A qualifying state paid employee with 5-9 years of satisfactory evaluations and an at-standard or above on their most recent evaluation will receive a minimum \$250.**

**A qualifying state paid employee with 10-19 years of satisfactory evaluations and an at-standard or above on their most recent evaluation will receive a minimum bonus of \$500.**

**A qualifying state paid employee with 20-29 years of satisfactory evaluations and an at-standard or above on their most recent evaluation will receive a minimum bonus of \$750.**

**A qualifying state paid employee with 30+ years of satisfactory evaluations and an at-standard or above on their most recent evaluation will receive a minimum bonus of \$1000.**

**Any bus driver regardless of years of service with a satisfactory evaluation is eligible to receive \$250.**

**An employee is only entitled to one bonus; that bonus being the highest for which they qualify for.**

**An employee who has received an unsatisfactory evaluation or letter of reprimand in the past 5 years will be ineligible for the Merit-Based Bonus.**

**A School Based Administrator that led a school receiving an “A” rating on the School Performance Grade for 2015-16 will receive \$3000.00**

**A School Based Administrator that led a school receiving a “B” rating on the School Performance Grade for 2015- 16 will receive \$1500.00**

**A Principal that led a school which qualified as “Exceeding Growth” on the School Performance Grade for 2015 -16 will receive \$1500.00**

**An Assistant Principal of a school which qualified as “Exceeding Growth” on the School Performance Grade for 2015-16 will receive \$500.00**

**A Principal that leads a school with a qualifying graduation rate above the state average will receive \$1500.00**

**An Assistant Principal that lead a school with a qualifying graduation rate above the state average will receive \$500.00**

Legal References: Session Law 2016-94

Adopted: November 17, 2016

Edenton-Chowan Schools Merit Based Bonus  
Proposal





## **Merit-Based Bonus- House Bill 1030 (Section 36.1A.(a))**

The North Carolina General Assembly's Appropriations Act (House Bill 1030) contained a provision for merit pay for "non-educators" (see Appendix). Nonrecurring funds for the 2016-2017 fiscal year have been authorized to provide a one-time merit-based bonus to state-funded personnel in accordance with eligibility policies adopted by the employing agencies.

Additionally, per legislation, the merit-based bonus shall not be used for across-the-board allocations. The merit bonus will be based on performance levels for eligible employees. The superintendent shall ensure that the total amount of funds awarded do not exceed the amount of funds provided by the state for the purpose of providing merit-based bonuses.

### **Eligibility**

In accordance with this provision, a one-time merit-based bonus will be granted in April 2017 for eligible Edenton-Chowan Schools employees employed in a state funded position. Local and federal funded eligible employees will also receive the merit bonus from local funding as approved by the Board of Education.

As per Section 36.1 A.(b)(6) of the legislation, eligible employees for each local board of education include "school-based administrators, central office, and noncertified personnel. Educators are not eligible. " In addition, the Superintendent will not be eligible to receive a merit pay bonus under this plan.

Employees with permanent (full-time/part-time) positions are eligible, including those permanent full-time employees who work a 10, 11, or 12-month schedule. The merit bonus will be prorated for any eligible employee in a permanent part-time position.

Employees hired on or before January 1, 2016 and who remain continuously employed through February 28, 2017 are eligible.

### **Performance**

Employees who receive less than a satisfactory or proficient rating on any function or standard on a performance evaluation plan for 2015-2016 will not be eligible to receive a merit bonus. In addition, any employee who is on an action/improvement plan as of February 28, 2017 is not eligible.

## Appendix

### **STATE-FUNDED PERSONNEL/MERIT-BASED BONUSES AUTHORIZED**

**SECTION 36.1A.(a)** Funds for Merit-Based Bonuses. – Of the funds appropriated in this act from the General Fund and Highway Fund to the Compensation Bonus Reserves, nonrecurring funds for the 2016-2017 fiscal year are authorized generally to provide employing agencies with funds to award one-time merit-based bonuses to State-funded personnel in accordance with eligibility policies adopted by the employing agencies. The eligibility policy shall not provide an across-the-board bonus for this purpose. Notwithstanding G.S. 135-1(7a) and G.S. 135-53(5), merit-based bonuses awarded under this Part are not compensation under Chapter 135 of the General Statutes.

**SECTION 36.1A.(b)** Employing Agency. – For the purposes of this Part, "employing agency" includes the following entities employing State-funded personnel:

- (1) The State Human Resources Commission, for executive branch departments with respect to both EHRA and SHRA employees, except University of North Carolina EHRA employees.
- (2) The Administrative Office of the Courts and the Commission on Indigent Defense Services, for the judicial branch.
- (3) The Legislative Services Commission, for the legislative branch.
- (4) The Board of Governors of The University of North Carolina, except as to its SHRA employees.
- (5) The State Board of Community Colleges, for the North Carolina Community College System.
- (6) Each local board of education, for school-based administrators, central office, and noncertified personnel. Educators are not eligible.

**SECTION 36.1A.(c)** Reporting. – Each local board of education shall provide to the Department of Public Instruction (DPI) the details of how these funds are distributed by House Bill 1030 Session Law 2016-94

Clay County Schools  
2016/17 Merit Based Bonus Plan

As required by the 2016 General Assembly (HB 1030), each school district will develop a Merit Based Bonus Plan for eligible employees:

I. Eligibility -

To be eligible for a one-time merit-based bonus, an employee must meet the requirements established below:

a. Position Requirements

State funds are provided for state-funded employees who are school administrators, central office employees, or non-certified employees. Local or Special Revenue Funds will be used as necessary to fund merit-based bonuses for non-state funded positions. Teachers and instructional support paid from the certified educator salary schedules are not eligible. This includes (but is not limited to) teachers, school counselors, psychologists, nurses, audiologists, speech language pathologists, media coordinators, social workers, etc.

b. Performance Requirements

In order to receive the merit-based bonus in 2016/17 a qualifying state paid employee must have at least five years of experience in the Clay County School System and have received no disciplinary action between the dates of January 1, 2017 and June 9, 2017.

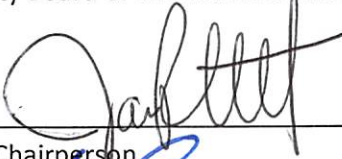

II. Amount of Bonus

Bonuses shall be allocated as follows:

- a. A qualifying employee with 5-9 years will receive a minimum of \$350.
- b. A qualifying employee with 10-19 years will receive a minimum of \$600.
- c. A qualifying employee with 20-29 years will receive a minimum of \$850.
- d. A qualifying employee with 30+ years will receive a minimum of \$1,100.

Qualifying permanent part time employees will receive a pro rata amount based on hours worked.

Plan approved by majority vote of the Clay County Board of Education on the 28<sup>th</sup> day of November 2016.

	11/28/2016
Chairperson	Date
	11/28/16
Secretary of the Board	Date

## **Cleveland County Schools**

### **Merit-Based Bonus Plan—2016-2017**

The General Assembly's Appropriations Act (House Bill 1030) directed LEAs to develop a one-time, merit bonus pay plan for "non-educators." One of the major stipulations is that the plan cannot be "across-the-board." Therefore, Cleveland County Schools has developed the following plan.

#### **Eligibility Requirements**

- As defined by law, the following categories of employees are eligible: school-based administrators, central office staff, and noncertified personnel. All employees in these categories will be eligible.
- Must currently be employed in a permanent capacity (part time or full time) in one of the eligible categories listed above.
- Must have been continuously employed in a permanent capacity with Cleveland County Schools since at least December 31, 2015 in one of the eligible categories listed above.
- Must be in active status at least one day from January 1, 2016 to the date the bonus is paid.
- Must be employed on the date the bonus is given.

#### **Evaluation Rating Requirement**

- If an employee received below standard ratings on any standard or area on their most recent evaluation for 2015-2016, then they are ineligible for the bonus.

#### **Merit Bonus Amount**

- Each full time employee who meets the eligibility requirements and evaluation rating requirements listed above will receive a merit pay bonus of a minimum of \$350 in their December 2016 paycheck.
- Each part time employee who meets the eligibility requirements and evaluation rating requirements listed above will receive a merit pay bonus of a minimum of \$175 in their December 2016 paycheck.

#### **Special Note:**

While HB1030 states that the merit-based bonuses are for "state funded" employees, Cleveland County Schools feels that in the interest of fairness, all eligible employees, regardless of funding type, should receive the bonus. Therefore, this one-time bonus will be paid to all eligible employees from their salary funding source.

# Columbus County Merit Based Bonus Proposal

12-5-2016

H. Alan Jaulh

**Merit-Based Bonuses****Policy Code: 7601**

---

The North Carolina General Assembly's Appropriation Act (HB 1030) included a merit-based bonus for non-educators. In accordance with S.L. 2016-94, sec. 36.1 A, the Columbus County Board of Education will award these bonuses to eligible employees in June, 2017 as outlined in this plan policy. To be consistent with the law, the allocation of these one-time bonuses will be not be across-the-board. The amount of bonus awarded will not be added to the employee's ongoing base salary and will not be considered compensation for retirement purposes.

**A. Eligibility**

To be eligible for a one-time merit-based bonus, an employee must meet these requirements:

**1. Position Requirements**

School based administrators, central office personnel and non-certified personnel employed by September 1, 2016 and remain employed through the end of the school calendar year. Teachers and Instructional support personnel paid on the teacher salary schedule(s), central office and ancillary administrators, coordinators, re-employed retirees and substitute personnel are not eligible. If an eligible employee is not 100% employed, he or she will only receive the prorated amount of employment.

**2. Performance Requirements****a) School based administrators:**

Schools that receive a School Performance Grade of a B or above, or exceeded growth based on the data from the previous school year will receive:

Principals - \$2,000

Assistant Principals - \$1,000

**b) Non-certified Personnel and Central Office Personnel**

(Teacher Assistants, Tutors, Facilitators, Custodians, Computer Technicians, Therapists, Child Nutrition Personnel, Office Support, Maintenance and Transportation Personnel)

**(1) Attendance**

Eligible employees should not have more than 1 day of absence from September 1, 2016 through the end of first semester or should not have more than 1 day of absence from the beginning of second semester through May 31, 2017. Employees on leave of absence, short-term disability, worker's compensation or etc. are not

eligible. Holidays and scheduled annual (vacation) leave days are not included in the absence days.

Eligible employees who meet the attendance requirement will receive \$250.00 for each semester.

Employees with a break in State service or separate from State service prior to the last day of the pay period in which payment is disbursed, are not eligible.

(2) Longevity

Regardless of attendance as outlined in section A.2.b)(1) above, teacher assistants, tutors, facilitators, custodians, computer technicians, therapists, child nutrition personnel, office support, maintenance and transportation personnel will be paid based on the State Guidelines for Longevity and in accordance with the scale below:

Years	Amount
6-10	\$100.00
11-15	\$150.00
16-20	\$200.00
21-25	\$250.00
26+	\$300.00

Teachers and Instructional support personnel paid on the teacher salary schedule(s), central office and ancillary administrators, coordinators, re-employed retirees, bus drivers, bus monitors, and substitute personnel are not eligible.

(3) Bus Drivers

Regular full-time bus drivers should not have more than 1 day of absence from September 1, 2016 through the end of first semester or should not have more than 1 day of absence from the beginning of second semester through May 31, 2017.

Eligible employees who meet the attendance requirement will receive \$200.00 for each semester.

(4) Bus Monitors

Bus monitors should not have more than 1 day of absence from September 1, 2016 through the end of first semester or should not have more than 1 day of absence from the beginning of second semester through May 31, 2017.

Eligible employees who meet the attendance requirement will receive \$100.00 for each semester.

**B. Allocation of Merit-Based Bonus**

The superintendent shall ensure the total amount of funds awarded do not exceed the amount of funds allotted by the state for the purpose of providing merit-based bonuses to state-funded positions. Other non-state-funded positions will be funded according to the eligible employees' funding source(s) of their position. Funds will be distributed based on the eligibility requirements previously stated. Should there be extra funds remaining, the funds will be distributed based on the criteria of 2 days of absence. The formula will be determined by the amount of funds remaining.

**C. Policy Sunset**

This policy is effective for the 2016-17 school year only unless the board takes further action to continue it in effect.

Legal References:

Cross References

Adopted: December 5, 2016

Revised:





# WHITEVILLE CITY SCHOOLS



**Board of Education**  
Kandle Rogers, *Chair*  
Greg Merritt, *Vice Chair*  
Coleman D. Barbour  
Rev. Dave Flowers  
Carlton Prince

107 West Walter Street  
Whiteville, North Carolina 28472  
Telephone: 910.642-4116 Fax: 910.642-0564  
www.whiteville.k12.nc.us

Charles K. Garland  
*Superintendent*

"EVERYONE COMMITTED TO THE SUCCESS OF **ALL** STUDENTS"

---

## PROPOSAL: MERIT BASED BONUS FOR NON EDUCATORS

House Bill 1030 includes a non-recurring line item entitled "Merit Based Bonus for Non-Educators". Its purpose is to provide a one-time bonus for school system employees that are not classified as teachers. The NC State Legislature allocated \$17,242,627 for this bonus. The allotment for Whiteville City Schools comes to \$39,104.

A team of WCS employees came together to form a committee to determine the best proposal for dividing the money fairly and effectively, keeping in mind that the state intends this to be a bonus based on merit.

A survey was sent to the entire school district to provide feedback and gain opinions from all stakeholders. The team decided the bonus would be based on the following criteria:

- Attendance
- Performance Evaluations
- Longevity
- School Performance (applies to principals, assistant principals and teacher assistants only)
- Safety (applies to bus drivers only)

To be eligible to receive the bonus, the following requirements need to be met as well.

- Must be currently employed with Whiteville City Schools, and have worked the full year 2015-2016. Employees on short term disability for the 2015-2016 school year are ineligible.
- Employees on a directed action plan or with recent disciplinary letters in their file are ineligible.
- Bonuses are prorated based on full time or part time status: Employees that work in excess of 30 hours per week are considered full time employees. Part time employees will receive 50% of the bonus allocated to them based on the criteria listed above.
- Eligibility requires that the employee be classified as a non-educator during the 2015-2016 and 2016-2017 school year.

### Additional Information

- Initial bonuses will be disbursed during the month of January. An additional bonus/supplement up to 2.5% will be disbursed in June for part time bus drivers who have good attendance and clean driving record.
- Up to \$2,500 dollars will be allocated by the superintendent on a meritorious service basis for central office personnel who are classified as non-educators.

Attached, you will find a more detailed explanation of the criteria we will be using for the bonus as well as the individual criteria for each employment category. There is also a list of the types of employees that can be considered for the bonus.

### Merit Based Bonus Criteria

Category	Attendance	Evaluations	School Performance	Longevity	Safety
Bus drivers					
Teacher Assistants					
Assistant Principals					
Custodian					
Central Office Directors					
Principals					
Maintenance Workers					
Office Support					
Receptionist					
Cafeteria Worker					
Attendance	If you have current leave balance in annual or sick leave: (\$50.00) If you have taken days without pay in last 180 days (\$0.00).				
Evaluations	For each standard on the evaluation that receives a Proficient, Accomplished or Distinguished (\$25.00)				
School Performance	Exceeds Growth: (\$100.00). Meets Growth (\$50.00). Does not Meet Expectations (\$0.00)				
Longevity	1 - 10 years of service: (\$50.00). 11 - 20 years of service: (\$100.00). 21 - 30 years of service: (\$150.00)				
Safety	If there are any safety violations: (\$0.00). If there are no at fault accidents or safety violations: (\$50.00)				

### Merit Based Bonus Staffing Breakdown

Category	Number of Employees	% of total	% of Money
Assistant Principal	5	3.45%	\$1,344.83
Bus drivers	28	19.31%	\$7,531.03
Cafeteria Worker	24	16.55%	\$6,455.17
Central Office Directors	7	4.83%	\$1,882.76
Custodian	14	9.66%	\$3,765.52
Maintenance Workers	3	2.07%	\$806.90
Office Support	23	15.86%	\$6,186.21
Other (Tutor, Technology, ISS)	7	4.83%	\$1,882.76
Principals	5	3.45%	\$1,344.83
Teacher Assistants	29	20.00%	\$7,800.00
<b>Total:</b>	<b>145</b>	<b>100.00%</b>	<b>\$39,000.00</b>

---

---

## MERIT-BASED BONUS PAY PLAN FOR CRAVEN COUNTY SCHOOLS

---

---

The Craven County Board of Education will award one-time merit-based bonuses to eligible employees in March, 2017 in accordance with the plan outlined here and North Carolina Session Law 2016-94, section 36.1A.

The Craven County Board of Education understands:

- To be consistent with law, the allocation of these one-time bonuses will not be across-the-board.
- The amount of bonus awarded will not be added to the employee's ongoing base salary and will not be considered compensation for retirement purposes.

### A. ELIGIBILITY

To be eligible for a one-time merit-based bonus, an employee must meet the requirements established below.

#### Position Requirements

Full-time Clerical Staff and Teacher Assistants who were employed full-time on or before January 1, 2016 with no break in service and who are still currently employed full time with Craven County Schools will be eligible for a one time merit bonus based in accordance with S.L. 2016-94, sec. 36.1A.

#### Merit Pay Criterion

1. The bonus will be based on performance and longevity.
2. Performance is based on the most recent evaluation conducted prior to November 30, 2016
3. Longevity will be based on years of state service.
4. There will be 4 tiers in the merit pay plan to determine bonus amount.

#### Tiers of Merit Pay Bonus

**Tier 1:** Overall *Satisfactory* rating on the general indicators for the job position with less than 15 years of state service

**Tier 2:** Overall *Satisfactory* rating on the general indicators for the job position with 15 or more years of state service

**Tier 3:** Overall *Excellent* rating on the general indicators for the job position with less than 15 years of state service

**Tier 4:** Overall *Excellent* rating on the general indicators for the job position with 15 or more years of state service

### B. AMOUNT OF BONUS

- Tier 1: One time bonus of \$250
- Tier 2: One time bonus of \$500\
- Tier 3: One time bonus of \$750
- Tier 4: One time bonus of \$1,000

# Cumberland County Merit Based Bonus Proposal

## **MERIT-BASED BONUSES**

---

The board will award one-time merit-based bonuses to eligible employees in December, 2016 in accordance with the plan outlined here and North Carolina Session Law 2016-94, section 36.1A. To be consistent with law, the allocation of these one-time bonuses will not be across-the-board. The amount of bonus awarded will not be added to the employee's ongoing base salary and will not be considered compensation for retirement purposes.

### **A. ELIGIBILITY**

To be eligible for a one-time merit-based bonus, an employee must meet the requirements established below:

#### **1. Position Requirements**

A one-time merit-based bonus will be granted in December 2016 for eligible non-certified school-based personnel and school-based administrators employed in a position of 50% or higher. Per legislation, Teachers and instructional personnel paid on the teacher salary schedule are not eligible to receive the merit-based bonus.

Employees hired on or before January 1, 2016 and employed as of September 1, 2016 are eligible. Transfers from other LEAs are only eligible if they were hired by Cumberland County Schools on or before January 1, 2016 and employed as of September 1, 2016. When an employee transfers (lateral, demotion, reassignment, or promotion) within the district the employee shall be eligible for the merit bonus based on their 2015-16 school assignment.

Employees on LOA (regardless of type) must have at least six (6) months of cumulative work during the 2015-16 school year in order to be eligible.

Employees who separate from State service with a break in service, are not eligible. Example: An employee was actively employed since June 2015 but separated March 25, 2016. If the same employee is reinstated to state government on May 2, 2016, he or she would not be eligible for the merit-based bonus due to the break in service.

#### **2. Performance Requirements**

Employees whose school's EVAAS growth data "Met" or "Exceeded" expectations are eligible. Employees at primary schools whose EVAAS Educator Effectiveness rating "Met" or "Exceeded" expectations are eligible, while employees at schools with alternative models will be eligible based upon the growth designation aligned to their alternative model. Employees placed on an action/monitored/directed plan during the 2015-16 school year are not eligible.

---

**B. AMOUNT OF BONUS**

The superintendent shall ensure that the total amount of funds awarded do not exceed the amount of funds provided by the state for the purpose of providing merit-based bonuses.

Bonuses shall be allocated as follows:

Eligible staff whose schools "Met Growth" will receive a one-time merit bonus of no less than \$200.00. Eligible staff whose schools "Exceeded Growth" will receive a one-time merit bonus of no less than \$400.00.

By:



Chairman of the Cumberland County Board of Education

10/18/16  
Date

# Currituck County Merit Based Bonus Proposal

## Merit Pay Bonus Allocation for Non-Educators

### **Background:**

The State Board of Education approved the allocation method for the merit based bonus appropriated in SL 2016-94 Section 36.A1. The Currituck County School District has received a state allocation of \$60,754.00 for fiscal year 2016-17. In addition to the state allocation, the Currituck County School Board has allocated \$35,830.00 from local funds to insure all locally-paid, non-educational staff members are eligible for merit-based bonuses as well.

LEAs shall adhere to the following per the legislation

- Require the local board to adopt a policy/plan as to how to award the bonuses
- Shall not pay the bonus as an across the board bonus
- Only state funded personnel are eligible for a bonus from the State funds (locally-funded personnel will be included and will receive bonuses from local funds)
- Bonus is not subject to retirement
- Bonus is one-time payment (non-recurring)

Based on the total amount allocated by the state and the Currituck County School Board, the total amount available to each individual if he/she receives the full share would be approximately \$390.00. The final full share amount will be determined based on the calculation of the total number of criteria met as a whole district, divided into the state allocated amount, ensuring the maximum award to employees meeting all or some of the criteria reviewed.

### **Proposal:**

The Currituck County Board of Education believes that every employee plays a valuable role in the overall function and service of the educational system. As such, and knowing that there cannot be an across the board distribution of Merit Pay Bonus funds, the Board proposes the funds be distributed in the following manner:

#### ***Criteria:***

- Employee has no rating below “At Standard” or “Proficient” on any final rating as noted by his/her immediate supervisor for the 2015-2016 school year.
- Employee had no letter of reprimand placed into his/her personnel file during the 2015-2016 school year.
- Employee had an acceptable attendance record as indicated by his/her immediate supervisor during the 2015-2016 school year.

***Bonus Allocations:*** (\*Eligible employees shall receive a share of the merit pay allocation based on the number of criteria met and in proportion to their percentage of full-time employment.)

- Each employee who meets all three (3) criteria shall receive 100% of the Merit Pay Bonus.



- Each employee who meets two of the three (2/3) criteria shall receive 66% of the full Merit Pay Bonus.
- Each employee who meets one of the three (1/3) criteria shall receive 33% of the full Merit Pay Bonus.

### **Special Provisions:**

***New Hires:*** Employees hired on or before January 1, 2016 and who have a FY 2015-2016 performance plan with a performance evaluation rating of “Meets” or “Exceeds” expectations are eligible.

***Leave of Absence:*** Employees on LOA (regardless of type) must have at least six (6) months of cumulative work under a performance plan in order to be eligible to receive a performance evaluation rating. If an employee is on LOA during the time of the annual performance evaluation period, managers/supervisors must rate the employee upon return from LOA during the 2016-2017 performance period. The Office of State Budget and Management (OSBM) will reserve monies for employees returning from LOA who meet the aforementioned performance requirements, if the employee returns from LOA on or before June 30, 2017 (fiscal year end).

***Break in Service:*** Employees who separate from State service with a break in service are not eligible.

***Separations:*** The merit-based bonus does not apply to employees separated from State service prior to the last day of the pay period in which payment is disbursed.

### **Suggested Timeline:**

November 2016 – Presentation to Board of Education for review, discussion and possible approval of Merit Pay Bonus Allocation plan.

Distribute the list of eligible employees to the immediate supervisors for their review and final recommendations.

December 2016 – Immediate supervisors return completed and signed recommendations to the Superintendent for final review who will in turn forward to the finance department.

February 2017 – Distribution of Merit Pay Bonus in the February check.

Note: Timeline adjusts by one month based on the approval date by the Board.

# Dare County Merit Based Bonus Proposal

## **Merit-Based Bonus Plan**

In accordance with the legislation outlined in North Carolina Session Law 2016-94, section 36.1A, Dare County Schools proposes a plan to award a one-time, merit-based bonus to eligible employees. To be consistent with the state guidelines, the allocation of this one-time bonus will not be across the board. The bonus will not be added to the employee's ongoing base salary and will not be considered compensation for retirement purposes. Per state guidelines, teachers and instructional support personnel (media coordinators, guidance counselors, psychologists, speech language pathologists, etc.) are not eligible for this bonus.

### **A. Eligibility**

Employees eligible for the bonus include the following:

- Teacher Assistants
- School Nutrition
- After School Enrichment
- Bus Drivers and Transportation
- Principals and Assistant Principals
- Central Office
- theClerical/Administrative Support
- Maintenance/Custodians

### **B. Special Conditions**

- Must have been employed prior to July 1, 2016
- Must still be employed as of December 1, 2016
- Must be full-time or part-time (includes interim employees, but not substitutes)
- Must not be on a current performance action plan

### **C. Amount of Bonus**

- \$300 (\$150 if less than 30 hours per week)
- AND**
- \$450 – awarded to individuals who have been recognized as Employees of the Year since the inception of the programs

### **D. Funding Source and Date of Payment**

Eligible state-funded employees will be paid from the state appropriation of \$71,508, and all other eligible employees will be paid from matching local funds. The bonus will be paid in December, 2016.

Davidson County Schools  
**MERIT BONUS PAY PLAN FOR PRINCIPALS AND ASSISTANT PRINCIPALS**

Administrator Name: \_\_\_\_\_ Site: \_\_\_\_\_

<b>C R I T E R I A</b>			
Circle the number of points earned on each line and list the total points earned at the bottom of the page. Documentation must be provided to support each area where points were earned.			
Earned an advanced degree in 2015-2016 or 2016-2017	Yes 1 point	No 0 points	
Presented PD/training at district, state or national level 2015-2016 or 2016-2017	Yes 1 point	No 0 points	
Served or held an office on a district committee/board 2015-2016 or 2016-2017	Yes 1 point	No 0 points	
Received district, state or national recognition In 2015-2016 or 2016-2017	Yes 1 point	No 0 points	
Summary Evaluation 2015-2016	Proficient 1 point	Proficient or higher in all standards with a minimum of 1 area above proficient 2 points	
Participated in any of the following in 2015-2016 or 2016-2017: PTEC (Piedmont Triad Education Consortium), AP Academy (Assistant Principal Academy), ALA (Aspiring Leadership Academy), DLP (Distinguished Leadership in Practice)	Yes 1 point	No 0 points	
School-wide growth 2015-2016	Does not meet 0 points	Meets 1 point	Exceeds 2 points
Additional responsibilities/Level 2016-2017	Elementary 1 point	Middle 2 points	High 3 points

**1–3 Points \$1,000    4-7 Points \$2,000    8+ Points \$3,000**

**Total Points Earned:** \_\_\_\_\_

Any money remaining in state funds allotted for one-time merit-based bonuses after base bonuses are paid will be divided accordingly among all eligible employees who meet or exceed expectations as defined by this plan.

**Lexington City Schools**  
**One-Time Merit-Based Bonus Plan**

**Approved by the Board of Education on November 1, 2016**

**1. Eligible Employee Groups:** All full-time and part-time school-based administrators, central office and non-certified personnel employed by Lexington City Schools on September 15, 2016, and remaining continuously employed through April 17, 2017, are eligible for consideration.

**2. Qualifying Criteria**

**a. Longevity:** One point is awarded for every 5 years of current continuous employment with Lexington City Schools. Continuous service will be measured backwards from the last work day for 10-month employees for the 2016-17 school year (currently 6/16/2017) to the employee's most recent date of hire with Lexington City Schools.

**b. Attendance:** All eligible employees will begin with ten (10) attendance points. One attendance point will be subtracted for each absence, regardless of reason, that the employee incurs on any student day during the measurement period. The measurement period runs from the first student day of the school year (08/29/2016), through 04/17/2017. If an employee is absent for any reason for more than 5 student days, their attendance points balance will be set to zero (0) points.

**c. Scoring:** Eligible employees' longevity points and attendance points will be added together to comprise their merit points. Any employee with 10 or more total merit points will be considered to have exceeded expectations. Any employee with six (6) or more points will be considered to have met expectations and be eligible for the bonus.

**3. Base Amount of Bonuses:**

**a. Teacher Assistants:** \$500

**b. All other Eligible Employees:** \$300

Any money remaining in state funds allotted for one-time merit-based bonuses after base bonuses are paid will be divided equally among all eligible employees who meet or exceed expectations as defined by this plan.

**4. Date of Payment:** June 12, 2017

November 1, 2016

**REVISED**

Thomasville City Schools  
2016-2017  
Merit Pay Rubric

Allocation: \$35,628.00

Approximately 141 potential State paid positions

Child Nutrition will cover approximately 41 additional positions

Monies can be only used for prescribed persons and purposes

**Criteria One:** Eligible employees will be deemed as *full-time or part-time permanent employees who work 20 or more hours* without a break in service, **or transferring between or separating from the LEA** and are in the following categories on or before September 1, 2016:

**Eligible employees:**

Principals

Assistant Principals

District Office Administrators

Clerical Staff (Schools, District Office and other departments)

Teacher Assistants

Custodians

Maintenance Staff

Transportation Staff

Technology Staff

Child Nutrition Staff

Bus Drivers/Monitors

**Said employees on Leave of Absence**

**Non-Eligible employees:**

Any staff member who is paid on the teacher salary schedule.

**Criteria Two:** Employees will be in *attendance* for work 97% of the time from August 22, 2016 through December 21, 2016 (excluding Professional Development days).

**Criteria Three:** Eligible employees will be added additional dollars for categories described below based on *performance on their completed final 2015-2016 evaluation instrument.*

<b>Standard</b>	<b>Dollar Amount</b>
<b>Teacher Assistant</b>	
Unsatisfactory and Below Standard	0
Meets Expectations	30.00
Exceeds Expectations	60.00
<b>Support Personnel</b>	
Unsatisfactory and Below Standard	0
Meets Expectations	30.00
Exceeds Expectations	60.00
<b>Technology Classified Staff</b>	
Unsatisfactory and Below Standard	0
Meets Expectations	30.00
Exceeds Expectations	60.00
<b>Child Nutrition</b>	
Unsatisfactory and Below Standard	0
Meets Expectations	30.00
Exceeds Expectations	60.00
<b>Classified Personnel (Custodian)</b>	
Unsatisfactory and Below Standard	0
Meets Expectations	30.00
Exceeds Expectations	60.00
<b>Maintenance and Transportation Personnel</b>	
Unsatisfactory and Below Standard	0
Meets Expectations	30.00
Exceeds Expectations	60.00
<b>Principals, Assistant Principals, Building Administrator, Central Office Administrator</b>	
Developing	0
Proficient	30.00
Accomplished	60.00

All Non-Certified Employees: \$200.00 (base)

Non-Certified Employees include Bus drivers, monitors, cafeteria, custodians, maintenance, technology, clerical, teacher assistants

Administrators: \$150.00 (base)

(Administrators include principals, assistant principals, building administrator, Central Office Administrators)

Merit Bonus Plan Committee Members:

Nan Wall	Interim Finance Officer
Faith Wilson	Assistant Finance Officer
Carlton Hogan	Transportation Director
Brenda Watford	Child Nutrition Director
Lauren Trivett	Administrative Assistant
Crystal Clodfelter	Chief Accountability Officer
Dr. Cate Gentry	Chief Academic Officer
Angela Moore	Principal
Dr. Barbara Armstrong	Chief Talent Officer
Georgia Marshall	Interim Superintendent

Tentative Distribution Date: January 31, 2017



**Merit-Based Bonus Plan  
for  
Davie County Schools Employees  
2016 - 2017**

The Davie County Board of Education will award a one-time merit-based bonus to eligible employees in January 2017 in accordance with the plan outlined here and North Carolina Session Law 2016-94, Section 36.1A. This legislation provides funding in the 2016-17 state budget for one-time merit-based bonuses to be given to state-funded school-based administrators, central office, and noncertified personnel. No funds are provided by the state for locally paid employees. Davie County Board of Education will fund merit-based bonuses for locally paid employees from local current expense funds, federally paid employees from federal grant funds, child nutrition program employees from child nutrition funds and preschool employees from preschool funds. Educators (certified teachers and instructional support) are not eligible for the bonus pursuant to the legislation.

To be consistent with law, the allocation of these one-time bonuses will not be an across-the-board allocation. The amount of bonus awarded will not be added to the employee's ongoing base salary and will not be considered compensation for retirement purposes. The bonus will be awarded on a point based system with eligible employees entitled to earn from two (2) to five (5) points. The merit-based bonus is for the 2015-16 school year.

**Eligibility**

- School-based administrators and non-certified personnel are eligible. Central Office based administrators will not be eligible under this plan.
- School-based administrators and non-certified personnel hired and continuously employed in North Carolina Public Schools as of December 31, 2015.
- Employees with permanent full-time/part-time positions, including those permanent employees who work 10, 11 or 12 month schedules are eligible for a bonus based on their percentage of employment.
- Employees must be employed by Davie County Schools on the date the merit-based bonus is paid.

**Performance**

- Employees with an overall performance evaluation prior to December 31, 2016 and a rating of "meets" or "meets and exceeds" are eligible. Points will be awarded as follows:
  - a. "meets" = 1 point = \$100
  - b. "meets and exceeds" = 2 points = \$200
- Employees must have at least six (6) months of cumulative employment to be eligible to receive a performance evaluation rating.

**Disciplinary Actions**

Employees with a disciplinary action in 2015-16 or 2016-17 are not eligible.

**Longevity**

Employees with “meet” or “exceed” performance evaluation ratings will receive credit for years of service in North Carolina Public Schools. The date used to determine years of service is January 1, 2017. Points will be awarded as follows:

- a. 1 to 10 years of service = 1 point = \$100
- b. Greater than 10 years to 20 years of service = 2 points = \$200
- c. Greater than 20 years of service = 3 points = \$300

**Transfers**

Employees who transferred to a new position within Davie County Schools will receive their bonus based on their evaluation for the job/position they held during the 2015-16 school year.

**Amount of Bonus**

The superintendent shall ensure that the total amount of funds awarded for the bonus do not exceed the amount of funds provided by the state for the purpose of providing merit-based bonuses and the amount budgeted in the Davie County Board of Education local current expense fund, federal grants fund, child nutrition fund and preschool program for the purpose of merit-based bonuses. Bonuses shall be awarded as follows:

- a. \$100 – performance evaluation of “meets” expectations
- b. \$200 – performance evaluation of “exceeds” expectations
- c. \$100 – 1 to 10 years of service
- d. \$200 – Greater than 10 years to 20 years of service
- e. \$300 – Greater than 20 years of service

**Plan Sunset**

This plan is effective for the 2016-17 school year only unless the Board takes further action to continue it in effect.

# Duplin County Merit Based Bonus Proposal

## **DCS Plan for State Non Educator's Merit Based Bonus (One-Time)**

Identified Classified Staff

### **Qualifying Employees (Permenant Employees)**

- 1) Bus Drivers
- 2) TA with Permanent Bus Route
- 3) Custodians

### **Bonus Amount**

- 1) \$750 Full Time Employees
- 2) \$350 Part Time Employees

### **Criteria**

- 1) Perfect Attendance on Student Days (Starting Monday, October 10 - Friday, June 9)
- 2) Saftey - No incident/accident
- 3) Evaluations Proficient or higher (most recent)

### **Funding Source**

State

*Payable in June based on 2016-2017 School Year Available Preliminary Data*

# DCS Plan for State Non Educator's Merit Based Bonus (One-Time)

Schools

## Principals

Incentive	Criteria	Funding Source
\$ 2,500.00	10% Increase in School Overall Performance Composite	State

## Assistant Principals/Chief Instructional Coaches (AP Pay Scale)

Incentive	Criteria	Funding Source
\$ 2,500.00	10% Increase in School Overall Performance Composite	State

*Payable in June based on 2016-2017 School Year Available Preliminary Data*



## **Durham Public Schools Merit-Based Bonus Plan for Non-Educators**

A one-time merit-based bonus will be granted for employees employed in a state-funded position. The amount for use is \$469,318.

Per legislation, the merit-based bonus shall not be used for across-the-board allocation. The amount of the bonus will be based on performance levels for eligible employees.

Employees with a permanent (full time/part time) status are eligible, including those permanent full-time employees who work a 9, 10, or 11-month schedule whose salary is \$35,000 annually or less.

Teachers are not eligible to receive the merit-based bonus.

### **Performance**

Employees with a completed Fiscal Year (FY) 2015-2016 performance plan, with an overall performance evaluation rating of “Meets” or “Exceeds” expectations are eligible. Employees must have at least six (6) months of cumulative employment under a performance plan in order to be eligible to receive a performance evaluation rating. Employees without a performance evaluation rating are not eligible.

Please be reminded that the completion deadline for the Annual Performance evaluation is September 13, 2016. Extensions will not be granted without demonstrated extenuating circumstances.

### **Disciplinary Actions**

Employees with an active disciplinary action on October 1, 2016 are not eligible.

### **New Hires**

Employees hired on or before January 1, 2016 and who have a FY 2015-2016 performance plan with a performance evaluation rating of “Meets” or “Exceeds” expectations are eligible.

### **Transfers**

When an employee transfers (lateral, demotion, reassignment, or promotion) within schools or departments, the existing manager/supervisor shall assess performance and document progress and/or ratings prior to the transfer. If the transfer occurs within thirty (30) calendar days of the end of the interim review or annual performance evaluation, then a copy of the completed and signed interim review or the completed and signed annual performance evaluation shall be sent to the receiving manager/supervisor. If the transfer occurs more than thirty (30) calendar days prior to the interim review or annual performance evaluation, the existing manager/supervisor shall provide written performance information (i.e., documentation in the system of record or email) specific to the employee’s achievement of established goals and values to the receiving manager/supervisor.

It is imperative that managers/supervisors assess performance and document ratings in a timely manner to ensure that employees are properly assessed in the event of a transfer. If it is determined that there was insufficient time to evaluate an employee prior to the transfer, managers/supervisors should work with their assigned performance management administrator to determine the appropriate action(s). It should be noted that managers failing to follow such guidelines according to policy and/or egregiously delaying review of an employee, should be held accountable and such actions or lack thereof, should be reflected in their individuals performance evaluation.

### **Leave of Absence**

Employees on LOA (regardless of type) must have at least six (6) months of cumulative work under a performance plan in order to be eligible to receive a performance evaluation rating. If an employee is on LOA during the time of the annual performance evaluation period, managers/supervisors must rate the employee upon return from LOA during the 2016-2017 performance period. The Office of State Budget and Management (OSBM) will reserve monies for employees returning from LOA who meet the aforementioned performance requirements, if the employee returns from LOA on or before June 30, 2017 (fiscal year end).

### **Break in Service**

Employees who separate from State service with a break in service, are not eligible.

Example: An employee was actively employed since June 2015 but separated March 25, 2016. This employee was under a performance plan for at least six (6) months. If the same employee is reinstated to state government on May 2, 2016, he or she would not be eligible for the merit-based bonus due to the break in service.

### **Separations**

The merit-based bonus does not apply to employees separated from State service prior to the last day of the pay period in which payment is disbursed.

See the attachment for the number of employees by category who could receive the bonus and the state and locals costs involved.

**Durham Public Schools**  
**Merit Pay Bonus Plan**  
**Personnel Under \$35,000 Annual Salary**

	FTE #	\$ amount	Bonus Cost	FICA 7.65%	Total
State	739.81	\$ 590	436,488.00	33,391.00	469,879.00
Local	179.33	\$ 590	105,804.00	8,094.00	113,898.00
Federal	32.85	\$ 590	19,382.00	1,483.00	20,865.00
Child Nutrition Grants/Comm	171.61	\$ 590	101,250.00	7,746.00	108,996.00
Ed	50.44	\$ 590	29,757.00	2,276.00	32,033.00
<b>Total</b>	<b>1,174.03</b>		<b>692,681.00</b>	<b>52,990.00</b>	<b>745,671.00</b>

**Category of Personnel**

142 Teacher Assistant – NCLB	496.07
143 Tutor (Interventionist)	1.95
144 Interpreter, Brailist, Translator, Education Interpreter	5.30
146 School-Based Specialist, ISS, Dist. Ed., Parent Liaison	21.45
147 Bus Monitor	44.62
151 Office Support	83.32
171 Bus Driver	252.00
173 Custodian	26.10
174 Cafeteria Worker	142.61
175 Maintenance/Transportation/Warehouse	19.00
176 Cafeteria/Before and After School Manager	46.44
178 Day Care/Before/After School Care Staff	35.17
<b>Total</b>	<b>1174.03</b>



# Edgecombe County Merit Based Bonus Proposal

## ***Merit Bonus Matrix***

Employee Name: \_\_\_\_\_

Position: \_\_\_\_\_ Site: \_\_\_\_\_

**CATEGORY I: Evaluation (2015-2016)** **TOTAL POINTS:** \_\_\_\_\_

At Standard or Proficient in all categories with a minimum of one (1) area listed as Above Standard or Above Proficient. N/A categories are excluded. (2 Points)

At Standard or Proficient in all categories with no standard listed below at Standard or at Proficient. N/A categories are excluded. (1 Point)

At Standard or Proficient in all categories with one (1) or more standards listed below at Standard or at Proficient. N/A categories are excluded. (0 Points)

**CATEGORY II: Present Performance** **TOTAL POINTS:** \_\_\_\_\_

July 1, 2016 to October 1, 2016: No discipline letters, memos, action plans. (2 Pts)

July 1, 2016 to October 1, 2016: One (1) incident of a discipline letter, memo, action plan (0 Pts)

**TOTAL POINTS (CATEGORY I and II):** \_\_\_\_\_

**EXCEEDS: 4pts (\$500 Bonus) MEETS: 3pts (\$250 Bonus) Less than 3pts: (No Bonus)**

**SPECIAL CONDITIONS: To be eligible, the employee must have been employed with ECPS January 1, 2016 through October 1, 2016. Individuals on an approved leave of absence, including FMLA, and Short-Term Disability, are eligible.**

Eligible Groups:

Office Support Staff	Child Nutrition	Custodian
Teacher Assistants	Transportation	ISS
Clerical Staff	Bus Driver	Technology
Auxiliary Services / Operations	Bus Monitor	ESL Tutor
Daycare Support Staff	Non-Licensed Director	Coordinators

**INITIAL'S OF PERSON COMPLETING MATRIX:** \_\_\_\_\_

**SUPERVISOR'S SIGNATURE:** \_\_\_\_\_

## Winston-Salem/Forsyth County Schools Proposed Merit-Based Bonus Pay Plans

The state has allotted \$647,145 to Winston-Salem/Forsyth County Schools to provide merit-based bonuses to non-instructional employees. The guidelines provided by the state prohibit the money to be used for ALL non-instructional employees to be shared equally. Local boards of education are charged with determining the criteria for receiving the bonus. The WS/FC Board of Education seeks to award as many eligible employees a bonus as possible.

The guidelines restrict the funds to be paid to state-paid employees. Therefore, our Board of Education proposes the use of local and federal funds to provide bonuses to all classified positions in the district. Because the bonus is a one-time cost, proposed funding for local costs is one-time savings in liability insurance premiums. Federal grants will pay for employees paid with federal funds.

All payments will be one-time bonuses with no retirement withholdings.

### **Classified (Non-Administrative) Personnel including Longevity**

**Proposal:** Employees with "Acceptable" or better evaluations and no negative supervisor write-ups in their Personnel File since July 1, 2014 will receive the identified percentages of annual pay based on date of hire.

Only employees hired prior to July 1, 2014 and employed as a classified employee on the pay date will be eligible. Pay date will be on or before Dec. 16.

Teacher assistants who work in schools that did not meet growth are eligible for this bonus. Other teacher assistants are addressed in the Teacher Assistant section.

Bus drivers are also eligible for a flat-rate bonus as described below.

Contingency: If state-allotted funds remain unspent at the end of the year, any unspent funds will be allocated and paid to this group of employees based on the below percentage relationships in June.

Prior to July 1, 2009	1.3%	\$390 for an employee with a \$30,000 annual salary
July 1, 2009-June 30, 2012	0.6%	\$180 for an employee with a \$30,000 annual salary
July 1, 2012-June 30, 2014	0.4%	\$120 for an employee with a \$30,000 annual salary

**Estimated cost:** State, \$260,000; Federal, \$35,000; Local, \$100,000

### **Teacher Assistants**

**Proposal:** Employees with "Acceptable" or better evaluations and no negative supervisor write-ups in their Personnel File since July 1, 2014 and who work at schools that met or exceeded 2015-16 NC READY student performance growth will receive the identified percentages of annual pay.

Because the criteria is the previous year's student performance growth, only teacher assistants with a hire date prior to July 1, 2016 and still employed as a classified employee as of the payment date will be eligible. Pay date will be on or before Dec. 16.

Exceeds growth (or Progressing)	4%	Average: \$850-900
Meets growth (or Maintaining)	2%	Average: \$425-450

**Estimated cost:** State, ~\$310,000; Federal, \$90,000; Local, \$3,800

**Bus Drivers**

**Proposal:** In addition to the Classified Personnel including Longevity bonus criteria above, bus drivers with "Acceptable" or better evaluations and no negative supervisor write-ups in their Personnel File since July 1, 2014 will receive a \$300 bonus.

Only employees hired prior to July 1, 2014 and employed as a classified employee on the pay date will be eligible. Pay date will be on or before Dec. 16.

**Estimated cost:** State, ~\$150,000

**Child Nutrition**

**Proposal:** Employees with "Acceptable" or better evaluations and no negative supervisor write-ups in their Personnel File since July 1, 2014 will receive the identified percentages of annual pay based on date of hire.

Because most Child Nutrition employees are paid hourly for 3-5 hours of work per day, their proposed percentages are higher than the Classified Personnel percentages. Additionally, the proposal is to provide all hourly-paid employees hired prior to Jan. 1, 2016 with a bonus.

Additionally, for school-based Child Nutrition employees, a quarterly perfect attendance bonus of \$50 per quarter will be offered for the second, third, and fourth quarters of this school year, payable in February, April, and June, respectively.

**Hourly**

Prior to July 1, 2009	4%	\$509 per employee average
July 1, 2009-June 30, 2012	3.5%	\$381 per employee average
July 1, 2012-Dec. 31, 2015	3%	\$289 per employee average

**Salaried, Grades 52-62**

Prior to July 1, 2009	3%	\$777 per employee average
July 1, 2009-June 30, 2012	2.5%	\$680 per employee average
July 1, 2012-June 20, 2014	2%	\$506 per employee average

**Salaried, Grades 63-67**

Prior to July 1, 2009	1.3%	\$536 per employee average
July 1, 2009-June 30, 2012	0.6%	no employees in this category
July 1, 2012-June 20, 2014	0.4%	no employees in this category

**Estimated cost to district:** None (to be paid by Child Nutrition)

# **FRANKLIN COUNTY SCHOOLS**

## **MERIT BASED BONUSES**

---

The Franklin County Schools Board of Education will award one-time merit-based bonuses to eligible employees in February, 2017 in accordance with the plan outlined here and North Carolina Session Law 2016-94, section 36.1A.

The Franklin County Schools Board of Education understands:

- To be consistent with law, the allocation of these one-time bonuses will not be across-the-board.
- The amount of bonus awarded will not be added to the employee's ongoing base salary and will not be considered compensation for retirement purposes.

### **A. ELIGIBILITY**

To be eligible for a one-time merit-based bonus an employee must meet the requirements established below.

#### 1. Position Requirements

- a. Principals who were employed full time in 2015-2016 school year and who are still currently employed full time with Franklin County Schools will be eligible for a one time merit bonus based in accordance with S.L. 2016-94, sec 36.1A. Any employee who retired, resigned, or took a leave of absence during 2015-2016 school year are not eligible for a one time merit-based bonus.
- b. State funded classified employees who were employed full time in 2015-2016 school year and who are still currently employed full time with Franklin County Schools will be eligible for a one time merit bonus based in accordance with S.L. 2016-94, sec 36.1A. Any employee who retired, resigned, or took a leave of absence during 2015-2016 school year are not eligible for a one time merit-based bonus.

#### 2. Performance Requirements

- a. Principals
  - i. School Met growth
  - ii. Exceeded growth
- b. State funded classified employees
  - i. Recommended by principal
  - ii. Must consider
    1. Attendance
    2. Evaluations

- 
- 
- iii. Approved by Human Resources and district leadership team

## **B. AMOUNT OF BONUS**

The total amount of \$95,280.00 will be distributed to principals and state funded classified personnel who met the merit based criteria. Bonuses shall be allocated as follows:

1. Principals
  - a. School met/exceeded growth
    - i. Merit-based bonus of \$5,000.00
2. State funded classified employees
  - a. Schools allocated money based on ADM
    - i. \$6.00 per pupil
  - b. Bonus amount determined by principal
    - i. No less than \$500.00
    - ii. No greater than \$1,000.00

The total amount of funds awarded, \$95,280.00, does not exceed the amount of funds provided by the state for the purpose of providing merit-based bonuses.

# Gaston County Merit Based Bonus Proposal

## **MERIT-BASED BONUS SUMMARY SHEET**

---

### **General Statutes for Merit-Based Bonuses (Sessions Law 2016-94 – HB 1030):**

- Will be paid from non-recurring funds for the 2016-2017 fiscal year;
- The merit-based bonus is a one-time payment to eligible State-funded personnel;
- Eligible employees include school-based administrators, central office, and non-certified employees;
- Educators are **not** eligible;
- The eligibility policy shall not provide an across-the-board bonus for any purpose.

### **Market Analysis:**

- Received and utilized a template for a Merit-Based Bonus Plan prepared by NCSBA;
- Obtained and reviewed proposed Merit-Based Bonus Plans from other LEAs including:
  - Cleveland County Schools;
  - Rowan-Salisbury School System;
  - Kannapolis City Schools;
- Discussed this topic with leaders from other Districts;
- Range of proposed payments \$175 - \$350;
- Range of proposed payment dates is from December 2016 to February 2017.

### **Recommendations for GCS Employee Eligibility:**

- The term “educators” includes all state certified employees (teachers, guidance counselors, etc.);
- Employee must have been employed with GCS from December 31, 2015 through November 30, 2016 in a permanent capacity to qualify;
- Employee must have received not less than a “meets expectations” rating and not have any written disciplinary action during the qualifying period;
- Qualified permanent part-time employees (work at least 20 hours) will receive a pro rata bonus based on their regular work schedule.

### **Miscellaneous:**

- The GCS state funded merit-based bonus amounts to \$317,968;
- The local cost of the GCS Merit-Based Bonus Plan is approximately \$160,000 to \$180,000;
- The expected number of qualified employees is 1,400;
- The bonus payment is expected to be around \$175 to \$350 (pre-tax) for each eligible employee.

### **Timeline:**

- September 27, 2016 – Present merit bonus plan to Cabinet for review and approval;
- October 17, 2016 – BOE review and approval of GCS Merit-Based Bonus Plan;
- November 30, 2016 – Cutoff date for merit bonus eligibility;
- December 13, 2016 – List of merit bonus recipients is submitted to payroll;
- December 20, 2016 – Submit merit bonus distribution report to DPI;
- January 10, 2017 – Pay merit bonuses to qualified employees in separate payroll.



## **GASTON COUNTY SCHOOLS**

### **MERIT-BASED BONUS PLAN**

---

The Board of Education will award one-time merit-based bonuses to eligible employees in January 2017 in accordance with the Plan outlined here and North Carolina Session Law 2016-94, Section 36.1A. To be consistent with law, the allocation of these one-time bonuses will not be across the board. The amount of the bonus awarded will not be added to the employee's ongoing base salary and will not be considered compensation for retirement purposes.

#### A. Eligibility

By law, employees that are considered "educators" will be **not** eligible for the bonus. Educators include all teachers and other certified employees that are paid on the state certified employee pay scale. The bonus will be available to permanent school-based administrators, central office personnel, and noncertified personnel (qualified positions) that meet **all** of the following requirements:

- Employee must have been employed by GCS from December 31, 2015 through November 30, 2016 (eligibility period) in a qualified position;
- Employee may not have received an evaluation rating of less than "meets expectations" during the eligibility period;
- Employee may have not received any written disciplinary action during the eligibility period;
- Employee must work at least 20 hours per week during their regular work schedule. An employee working at least 20 hours, but less than 100%, will receive a pro rata bonus based on their regular work schedule;
- The employee must be in good standing with GCS as of November 30, 2016.

#### B. Other Items

- While the law states that the merit-based bonuses are for "state-funded personnel", the Board of Education believes that in the interest of fairness, all eligible employees, regardless of funding source, should receive the bonus;
- The one-time bonus will be paid on or about January 10, 2017 to eligible employees in a separate payroll;
- The estimated amount of the one-time bonus will be \$175 (pre-tax) to \$350 (pre-tax) payable to each eligible employee.

## **SESSIONS LAW 2016-94 (HOUSE BILL 1030)**

### **STATE-FUNDED PERSONNEL/MERIT-BASED BONUSES AUTHORIZED**

**SECTION 36.1A.(a)** Funds for Merit-Based Bonuses. – Of the funds appropriated in this act from the General Fund and Highway Fund to the Compensation Bonus Reserves, nonrecurring funds for the 2016-2017 fiscal year are authorized generally to provide employing agencies with funds to award one-time merit-based bonuses to State-funded personnel in accordance with eligibility policies adopted by the employing agencies. The eligibility policy shall not provide an across-the-board bonus for this purpose. Notwithstanding G.S. 135-1(7a) and G.S. 135-53(5), merit-based bonuses awarded under this Part are not compensation under Chapter 135 of the General Statutes.

**SECTION 36.1A.(b)** Employing Agency. – For the purposes of this Part, "employing agency" includes the following entities employing State-funded personnel:

- (1) The State Human Resources Commission, for executive branch departments with respect to both EHRA and SHRA employees, except University of North Carolina EHRA employees.
- (2) The Administrative Office of the Courts and the Commission on Indigent Defense Services, for the judicial branch.
- (3) The Legislative Services Commission, for the legislative branch.
- (4) The Board of Governors of The University of North Carolina, except as to its SHRA employees.
- (5) The State Board of Community Colleges, for the North Carolina Community College System.
- (6) Each local board of education, for school-based administrators, central office, and noncertified personnel. Educators are not eligible.

**SECTION 36.1A.(c)** Reporting. – Each local board of education shall provide to the Department of Public Instruction (DPI) the details of how these funds are distributed by House Bill 1030 Session Law 2016-94 Page 171 district and school. All other employing agencies, and DPI, shall report to the chairs of the Senate Appropriations/Base Budget Committee and the House of Representatives Committee on Appropriations and the Fiscal Research Division on the use of these funds by no later than February 1, 2017.

## **Gates County Merit Based Bonus Plan**

### **Background:**

The State Board of Education approved the allocation method for the merit based bonus appropriated in SL 2016-94 Section 36.A1. The following are guidelines for the bonus distribution:

- Be distributed based on a locally approved plan
- Cannot be distributed across the board
- Certified teachers or instructional support personnel are not eligible
- Will be subject to federal and state tax but not subject to retirement and will not be included when calculating longevity payments
- Must be distributed by June 30, 2016

### **Distribution Plan:**

The Gates County Board of Education believes that every employee plays a valuable role in the overall function and service of the educational system. It was determined that although funding for the merit bonus was only provided for state funded employees, all non-instructional personnel including Principals and Assistant Principals will be considered regardless of the funding source. In order to be eligible, employees must:

- Be employed by Gates County on or before January 1, 2016 and have not separated from Gates County prior to September 1, 2016.
- Have been employed in a position that is eligible for the merit based bonus on or before January 1, 2016.
- Have a completed evaluation on file no earlier than February, 2016 and no later than November, 2016.

A full share of said bonus would be approximately 1.7 percent of an employee's annual salary. An eligible employees' share of the bonus will be based on a numerical rating from evaluation criteria:

#### Criteria rating values:

Below Standard and/or Developing	0
Proficient	1
Accomplished	2
Distinguished	3

#### Employee's share based on numerical rating ranges:

0 to .99	0%
1.00 to 1.50	25%
1.51 to 2.00	50%
2.01 to 2.50	75%
2.51 to 3.00	100%

**Suggested Timeline:**

September – October: Finance and Personnel work together to outline distribution plan and discuss with Superintendent

November: Present distribution plan for Board approval

December: Send out communication to eligible employees with distribution on December 15

**Summary:**

- 154 eligible employees
- 152 eligible employees receiving bonus
- Board approved on November 7, 2016
- Bonus expenditures from the following budgets: state, federal, local, daycare, child nutrition and community center
- Approximate total expenditure: \$57,264

# Graham County Schools -Merit Based Bonus Plan

---

## **A. LEGISLATION**

The North Carolina State Board of Education implemented the merit-based bonus appropriation in SL 2016-94 Section 36.A1. Graham County Schools has received an allocation of \$27,277.00 for the fiscal year 2016-17.

Graham County must now have a locally approved plan that determines the distribution process.

## **B. ELIGIBILITY**

To be eligible for a one-time merit-based bonus, an employee must meet the initial requirements established below.

### **1. Position Requirements**

State funds are provided only for state-funded employees who are school administrators, central office employees, or non-certified employees. Teachers and instructional personnel paid on the teacher salary schedule are not eligible. Part-time state paid employees will receive a pro-rated share of the bonus.

### **2. Performance Requirements**

In order to receive the Merit-Based Bonus in 2016-17 a qualifying state paid employee must have at least five years of experience in the Graham County School system and have received an at-standard evaluation or above on their most recent evaluation. Employees who received a below standard or received a letter of reprimand within the last year will not be eligible.

## **C. AMOUNT OF BONUS**

The superintendent shall ensure that the total amount of funds awarded do not exceed the amount of funds provided by the state for the purpose of providing merit-based bonuses. Bonuses shall be allocated as follows:

A School Based Principal who received at least an overall rating of Accomplished on their most recent evaluation, leading at a school with a Performance Grade of C or better, will receive the following amount based on their cumulative years of educational service:

5-9 years:	\$ 1,000
10-15 years:	\$ 1,250
16-20 years:	\$ 1,500
21-25 years:	\$ 1,750
26+ years:	\$ 2,000

## Graham County Schools -Merit Based Bonus Plan

---

A School Based Assistant Principal who received at least an overall rating of Accomplished on their most recent evaluation, leading at a school with a Performance Grade of C or better, will receive the following amount based on their cumulative years of educational service:

5-9 years:	\$ 500
10-15 years:	\$ 750
16-20 years:	\$ 1,000
21-25 years:	\$ 1,250
26+ years:	\$ 1,500

Qualified Full-time Classified Employees in the following categories: Custodian, School-based Clerical, District-level Clerical, Transportation, Maintenance, School Resource Officer, Teacher Assistant will receive the bonus based on their years of service if they meet the Initial Criteria stated in the Performance Requirements:

5-9 years:	\$ 250
10-15 years:	\$ 375
16-20 years:	\$ 475
21-25 years:	\$ 600
26+ years:	\$ 725

### **D. Recommended Timeline**

December- Proposal presented to the Board of Education for review, discussion and decision.

Distribute list of eligible employees to immediate supervisors for their review, final recommendations and signatures.

January – Signed lists returned to Superintendent for final review. Superintendent turns in list to Finance department.

February- Distribution of Merit Pay Bonus during February payroll period.

# Granville County Merit Based Bonus Proposal

## Merit Pay Bonus Information

In the last fiscal budget, legislators approved money for each district in NC to provide some employees merit bonuses. Each district was required to submit a plan on how to distribute these funds using the following criteria:

- Teachers, or anyone on the teacher pay scale could not be included
- Employees receiving the bonus must be paid from state funds (not local, federal, or other funds)
- The plan could not distribute the money equally; there had to be a merit-based rubric
- The plan had to be approved by the Board of Education by December 1, 2016 and submitted to DPI

Based upon these factors the BOE wanted a plan that targeted employee groups that were paid out of state funds. The following plan was approved by the BOE on Monday, November 7, 2016.

Plan targets Custodians, Principals, and Assistant Principals

### Criteria and Possible Bonus Amounts

Classification	Amount/Employee	# of Positions	Total \$
Custodians – 10 mo	\$1,000	16	\$16,000
Custodians – 12 mo	\$1,200	40	\$48,000
Assistant Principals	\$1,300	19	\$24,700
Principals	\$1,800	19	\$34,200
TOTAL		94	\$122,900

### CRITERIA

Custodians will be provided a list of critical cleaning and safety expectations. Mr. Alston and other Central Services staff will inspect buildings to insure buildings are clean and safe. All custodians employed from October – May will receive \$1,000 or \$1,200 (10 or 12 month) if their buildings are clean and safe at these inspections, payable in May.

Assistant principals will receive \$750 for a Summative Evaluation where the AP is rated *At Standard* in all 7 areas, and must be *Above Standard* or greater in at least two areas. They can also earn \$550 for student performance by attaining a C or above on the NC Report Card, or by having *Met Growth* and improved in at least 50% of EOG/EOC tested areas from 2014-15 to 2015-16. The \$550 will be paid in January and the \$550 will be paid in May.



Principals will receive \$1,200 for a Summative Evaluation where the AP is rated *At Standard* in all 7 areas, and must be *Above Standard* or greater in at least two areas. They can also earn \$600 for student performance by attaining a C or above on the NC Report Card, or by having *Met Growth* and improved in at least 50% of EOG/EOC tested areas from 2014-15 to 2105-16. The \$600 will be paid in January and the \$1,200 will be paid in May.

NOTE: After eligible employees have been awarded their merit pay, if there are any remaining funds provided by the state for this merit plan, those funds will be evenly distributed to the eligible employees who meet the criteria described above.

GREENE COUNTY SCHOOLS  
MERIT BASED BONUS PLAN

The Greene County Board of Education approved the following Merit-Based Bonus Plan on November 14, 2016.

**Eligibility requirements are:**

- A. Only classified employees are eligible. Their job categories are :
  - 1. Bus Garage
  - 2. Bus Drivers
  - 3. Cafeteria Workers
  - 4. Custodians
  - 5. Data Managers
  - 6. Maintenance
  - 7. Secretarial Staff and Bookkeepers at each school site and central office
  - 8. Teacher Assistants and other Assistants

Classified employees were selected because they are paid from the lowest pay grades. Many of these employees have dual responsibilities which makes them extremely valuable to the everyday functions of our school system.
- B. The bonus will not be paid across-the-board.
- C. All eligible employees must have received a performance rating of “Meets” or “Exceeds” on their 2015-2016 performance plan.
- D. Employees without a 2015-2016 performance rating are not eligible.
- E. Employees paid from state funds and non-state funds who perform the same duties will be eligible to receive the bonus.
- F. Employees must have at least six months of cumulative employment to be eligible.
- G. Teachers or other employees paid on the Teacher Salary Schedule are not eligible.
- H. Employees hired on or before January 1, 2016 who have a performance plan which meets the minimum rating requirements are eligible.
- I. Employees on LOA (regardless of type) must have at least (6) months of cumulative work under a performance plan in order to be eligible to receive a performance evaluation rating.
- J. Employees with an active disciplinary action on October 1, 2016 are not eligible.
- K. Employees who separate from State service with a break in service are not eligible.
- L. The Merit-Bonus does not apply to employees separated from State service prior to the last day of the pay period in which payment is disbursed.

**Amount(s) to Award:**

- A. Full Time single assignment employees will receive \$526.00.
- B. Full Time dual assignment employees will receive \$626.00.
- C. Part Time and Time Limited Employees will receive a pro-rated bonus based on the number of hours they work. This amount will not be less than \$219.00.

**Payment Date:**

All eligible employees will receive their Merit-Based-Bonus on December 28, 2016.

## **MEMORANDUM**

**TO:** Philip Price, Chief Finance Officer, NCDPI  
Nicola Lefler, Information Analysis & Reporting, NCDPI

**FROM:** Sharon L. Contreras, Superintendent

**DATE:** November 30, 2016

**RE:** Guilford County Schools One-Time Merit-Based Bonus

In accordance with House Bill 1030 (Session Law 2016-194), please find attached the Guilford County Schools One-Time Merit-Based Bonus Plan. This plan was approved by the Guilford County Schools Board of Education during its meeting held on November 17, 2016. The Board of Education voted to formally adopt the One-Time Merit-Based Bonus for qualifying employees.

As required, the attached plan outlines:

- Eligibility requirements
- Amount(s) to award
- Payment date
- Special conditions related to break in service, leave of absence, or separations

Attachment

## **Guilford County Schools Merit Based Bonus Plan**

This is a one-time merit based bonus to be paid in December 2016 for eligible employees. Per legislation, the one-time merit based bonus should not be used for across-the-board allocation. The amount of the bonus will be based on performance levels for all eligible employees. Employees with permanent (full-time/part-time), probationary, and time-limited appointments are eligible, including those permanent full-time employees who work a 10, 11, or 12-month schedule.

The amount of the one-time merit based bonus is \$440.00 per full-time equivalent (FTE) employees as determined by dividing the total amount budgeted for merit based bonuses by the number of eligible FTE employees.

The one-time merit based bonus will be prorated for part-time employees based on their employment percentage in an eligible position as of November 1, 2016.

### **Eligible Employees**

All employees EXCEPT teachers and licensed instructional support personnel, subject to General Statute 115C, are potentially eligible for a one-time merit based bonus.

### **Eligibility Dates**

Employees must have been employed in an eligible position on or before January 1, 2016 and must be employed in an eligible position as of November 1, 2016.

### **Service Requirement**

Employees must have five (5) months of cumulative work in an eligible position from January 1, 2016 through November 1, 2016.

### **Performance**

Employees with a current overall performance rating of "Meets Expectations" or higher are eligible.

### **Leave of Absence**

Employees must have at least five (5) months of cumulative work (not on a leave of absence) from January 1, 2016 through November 1, 2016.

### **Separations**

Employees separated from Guilford County Schools prior to November 1, 2016 are not eligible.

### **Payroll Tax Withholding**

While the bonus is not subject to retirement withholding it is subject to all applicable payroll tax withholdings.

**HALIFAX COUNTY SCHOOLS  
NON-EDUCATOR  
MERIT-BASED BONUS PLAN  
2016-2017**

In accordance with North Carolina Session Law 2016-94, sec. 36.1A, the Halifax County Schools Board of Education will award a one-time merit-based bonus to eligible employees in June 2017. To comply with the law, the allocation of these one-time bonuses will not be across-the-board. The amount of bonus awarded will not be added to the employee's ongoing base salary and will not be considered compensation for retirement purposes.

**A. ELIGIBILITY**

To be eligible for a one-time merit-based bonus, an employee must meet the requirements established below:

**1. Position Requirements**

- a. Employment should be prior to January 3, 2017 and must continue through May 31, 2017.
- b. Employee must not have any active or pending disciplinary actions. This will include a reprimand through suspension without pay during the 2016-2017 school year.

**2. Performance Requirements**

The merit-based bonus will be awarded to employees in accordance to performance ratings and attendance.

**Merit-Based Bonus for the following employees:**

- 1. Teacher Assistants**
- 2. Custodians**
- 3. Bus Drivers**
- 4. Bookkeepers**
- 5. Bus Mechanics**

**Merit-Based Bonus Options:**

1. An employee who has “**Above Expectations/Outstanding**” overall on the 2016-2017 performance evaluation and **no absences** beginning January 3, 2017 until May 31, 2017 will receive a one-time merit-based **maximum** bonus.
2. An employee who has “**Above Expectations/Outstanding**” overall on the 2016-2017 performance evaluation and miss no more than 2 days will receive a reduced amount at a 50% rate of the maximum bonus.

**B. AMOUNT OF BONUS**

The superintendent shall ensure that the total amount of funds awarded do not exceed the amount of funds provided by the state for the purpose of providing merit-based bonuses. Bonuses shall be allocated as follows:

- Halifax County Schools has been allocated \$55,772.00 to be awarded in accordance to the 2016-2017 Merit-Based Bonus Plan.
- Part-time employees will be prorated.
- Bonus amounts will be determined based on the number of employees that meet the requirements.

- All bonuses awarded will be taxed.
- The HR Services will develop the list of eligible employees as identified in section A. 2. of the Merit-Based Bonus Plan for Halifax County Schools to be submitted to the Superintendent, Finance Officer, Principals and Directors by January 3, 2017.
- Principals and Directors will submit a list of employees to be awarded bonuses along with supporting documentation to HR Services by May 31, 2017.
- The HR Services and Finance will verify the eligibility of each employee listed.
- Bonus pay will be paid to all eligible employees by June 13, 2017.



# Roanoke Rapids City Merit Based Bonus Proposal

## **2016-2017 RRGSD Merit Based Bonus Proposal**

State Allotment: \$ 45,871.00

Classified Employee Bonus:

<b>Years of RRGSD Service</b>	<b>Bonus Amount</b>
0 - 9	\$350
10 - 19	\$575
20 +	\$750

*Amounts are estimated based upon the exact number of employees that qualify. Amounts will be adjusted to ensure utilization of 100% of state provided funds.*

- Based upon years of service to Roanoke Rapids Graded School District (RRGSD) in 2016-2017. If an employee has left RRGSD, and returned, years of service restart to the most recent hire date.
- Those paid on the RRGSD Administrator Pay Scale or hold a position of Principal, Assistant Principal, or Director in a department within RRGSD are not eligible.
- Must be currently employed (in pay status) by RRGSD in a permanent classified position as of 1/1/2017.
- For part-time employees, the bonus shall be pro rata based on the number of hours worked. Employees that are employed less than 20 hours per week are not eligible for the bonus.
- Employee should not have a letter of reprimand/concern placed in their personnel file between 1/1/2016 - 3/1/2017.
- Bonus will be paid on 3/31/2017.
- Bonus will not be subject to retirement withholding, but will be subject to FICA taxes.

*Approved by the Roanoke Rapids Graded Schools Board of Trustees on 11/21/2016*

# Weldon City Merit Based Bonus Proposal

## **MERIT-BASED BONUSES**

---

---

The board will award one-time merit-based bonuses to eligible employees on December 15, 2016 in accordance with the plan outlined here and North Carolina Session Law 2016-94, section 36.1A. To be consistent with law, the allocation of these one-time bonuses will not be across-the-board. The amount of bonus awarded will not be added to the employee's ongoing base salary and will not be considered compensation for retirement purposes.

### **A. ELIGIBILITY**

To be eligible for a one-time merit-based bonus, an employee must meet the requirements established below.

1. Position Requirements

*Employees who are considered non-educators, including school based administrators, central office and non-certified personnel, are eligible for merit bonuses. Educators (teachers and instructional support personnel paid on the teacher salary schedules) are not eligible.*

2. Performance Requirements

*Eligible employees must possess a satisfactory evaluation (meets or exceeds standards) between January 1<sup>st</sup> of the previous school year and the end of the previous school/fiscal year. Employees who have evaluations that include ratings less than meets expectations do not qualify for the merit bonus.*

3. Other Requirements

*Eligible employees must also have no disciplinary actions for the previous school/fiscal year and must have an attendance rating of at least 95% for the previous school/fiscal year.*

### **B. AMOUNT OF BONUS**

The superintendent shall ensure that the total amount of funds awarded do not exceed the amount of funds provided by the state for the purpose of providing merit-based bonuses. Bonuses shall be allocated as follows:

Full-time employees who meet all criteria and meet expectations = \$725.00

Full-time employees who meet all criteria and exceed expectations = \$1,225.00

Part-time employees who meet all criteria and meet expectations = \$450.00

Part-time employees who meet all criteria and exceed expectations = \$725.00

*If after calculations for the current amounts are completed, and the total amount*

---

---

*exceeds the amount awarded by the state, the Board of Education will revise merit-based bonus amounts by reducing awards in 5% increments until the total is equal to the state awarded amount.*

**C. POLICY SUNSET**

This policy is effective for the 2016-17 school year only unless the board takes further action to continue it in effect.

Legal References: S.L. 2016-94, sec. 36.1A

Approved: November 10, 2016

# Harnett County Schools Merit Bonus Matrix

Employee Name: \_\_\_\_\_

Position: \_\_\_\_\_ Site: \_\_\_\_\_

Criteria	Above standard	At standard	Below
<b>2015-16 Attendance</b>	Absent 0-6 days  2 points	Absent 7-13 days  1 point	Absent 14+ days  0 points
<b>2015-16 Evaluation</b>	“Meets Standard” or higher in all categories  2 points	“Meets Standard” in all categories with a minimum <b>exception</b> of one “Needs Improvement”  1 point	At least one “Unsatisfactory” in any category  0 points
<b>2015-16-present Performance</b>	July 1, 2015-present No discipline letters, memos, action plans submitted to the district level  1 point	Discipline letters, memos at the school/department level  0 points	Action plan, discipline letters/memos  0 points
<b>Total Years of Service HCS Longevity</b>	10 + years  2 points	5-9 years  1 points	Less than 5 years  0 points
<b>Total Points Earned</b>			

\*Absences based on sick leave and leave without pay. *Excludes FMLA, Short Term Disability, & Worker’s Compensation absences*

**Bonus Amount Key:**  
4 or greater=Merit Bonus \$600 Merit Bonus

**State Eligible Groups:**  
Clerical Staff  
Auxiliary Services/Operations  
Teacher Assistants  
Other Classified Staff

<b>Tentative Timeline:</b>	
October 3, 2016	BOE presentation & Approval
October 6, 2016	HR posts Merit Bonus Matrix on Wiki
October 7, 2016	HR Sends Aesop Attendance Report to schools
October 18, 2016	Deadline for supervisors to return HR Matrix
November 1, 2016	Payroll Process
December 2016	Employees receive bonus

Supervisor Verification Signature: \_\_\_\_\_

# Haywood County Merit Based Bonus Proposal

Brandon Price (Transportation)	Price Berryhill (ITC)
Todd Barbee (Principal)	Lori Fox (Assistant Principal)
Clifford Messer (Custodian)	Margaret Rogers (Clerical)
Adam Perry (Bus Driver)	Amanda Huertas (TA)
Jenny Wood (Central Office)	Ginger Moore (Cafeteria)
Adam Robinson (Maintenance)	Angie Gardner (Central Office)
Dr. Garrett (Superintendent)	

Initial Meeting was September 14<sup>th</sup> at 3:30

At this meeting, Mr. Heinz provided us with the state legislation and parameters. I was elected Chairman and we scheduled our next meeting for Monday, September 19<sup>th</sup> at 9:00 am. At this next meeting we were to come ready to vote on which groups should be excluded from the merit pay.

September 19<sup>th</sup>

Jenny Wood announced that the Central Office Administrators had voluntarily withdrawn their name from contention for the funds. The committee voted to not exclude any particular group, but decided to have it be a true Merit Pay decision based on their most recent evaluation.

1. Must be hired by 7/1/15.
2. Dual employees would only be evaluated for the pay based upon primary job.
3. The employee could have no current discipline.
4. If the employees' last evaluation averaged to "Above Standard", then they would be eligible for a "full share".
5. If the employees' last evaluation averaged to "At Standard", then they would be eligible for a "half share".
6. Full time employees are eligible for a "full share".
7. Part time employees are eligible for a "half share".

Examples, a part time custodian rated at "Above Standard", will get a ¼ share, where a full time school administrator rated as "At Standard" would get a "half share". A full time cafeteria worker rated as "Above Standard" would get a "full share".

Submitted by, Todd Barbee, Merit Pay Committee Chair. Approved by HCBoE on November 14, 2016.

Full Share= \$500.00 Half Share=\$250.00 Quarter Share= \$125.00

Date of Payment: December 30, 2016



# Merit Pay Plan Proposal 2016-2017



**HENDERSON COUNTY  
PUBLIC SCHOOLS**

Presented to the  
Henderson County Board of Education  
November 14, 2016

# Why Merit Pay?

---



- NC General Statute 2016-94 Section 36.A1
- One time allocation of funds
  - HCPS Allocation = \$139,287
- Requirements:
  - Be distributed based on a locally approved plan.
  - Not be distributed across the board.
  - Not be paid to certified teachers or instructional support.
  - Be paid to state funded personnel only.
  - One-time bonus not counted towards retirement income.

# Rationale for Merit Pay Proposal



- 
- Henderson County Public Schools **values the contributions of all our employees.**
  - Recognizing the state's parameters on the merit pay, we examined the **local financial impact** of including various groups of employees.
  - We recognize that:
    - Some employee groups **earn less** on average.
    - An employee group has taken a **pay cut** due to a reduction in hours.
  - We value **longevity** of service with the school system.

# Eligible Employee Groups



---

<b>Employee Group</b>	<b># of Employees on State Pay</b>	<b># of those Employees not on State Pay</b>
-----------------------	------------------------------------	--

# Eligible Employee Groups



---

<b>Employee Group</b>	<b># of Employees on State Pay</b>	<b># of those Employees not on State Pay</b>
Custodians	70	6

# Eligible Employee Groups



---

<b>Employee Group</b>	<b># of Employees on State Pay</b>	<b># of those Employees not on State Pay</b>
Custodians	70	6
Full time Bus Drivers/Riders	10	0

# Eligible Employee Groups



<b>Employee Group</b>	<b># of Employees on State Pay</b>	<b># of those Employees not on State Pay</b>
Custodians	70	6
Full time Bus Drivers/Riders	10	0
Teacher Assistants	125	65

# Eligible Employee Groups



<b>Employee Group</b>	<b># of Employees on State Pay</b>	<b># of those Employees not on State Pay</b>
Custodians	70	6
Full time Bus drivers/Riders	10	0
Teacher Assistants	125	65

## **Eligible but not included based on rationale/funding source:**

Principals, Assistant Principals, Central Office Staff, Therapists, Technicians, and Office Support.



# Rationale for Merit Pay Proposal



As employment categories were considered, the following proposed merit pay schedule was calculated:

Years of Service with HCPS:	Proposed Merit Pay: <i>(estimated amount)</i>
under 15 years of service	\$485
15 years or more of service	\$970

# Eligible Employee Groups



---

<b>Employee Group</b>	<b>Cost from State Allotment:</b>	<b>Local Cost:</b>
-----------------------	-----------------------------------	--------------------

# Eligible Employee Groups



Employee Group	Cost from State Allotment:	Local Cost:
Custodians	\$45,945	\$3,133
<b>Running Total</b> State allotment = \$139,287	\$45,945	\$3,133

# Eligible Employee Groups



Employee Group	Cost from State Allotment:	Local Cost:
Custodians	\$45,945	\$3,133
Full time Bus drivers/Riders (6 hours or more)	\$6,265	\$0
<b>Running Total</b> State allotment = \$139,287	\$53,210	\$3,133

# Eligible Employee Groups



Employee Group	Cost from State Allotment:	Local Cost:
Custodians	\$45,945	\$3,133
Full time Bus drivers/Riders (6 hours or more)	\$6,265	0
Teacher Assistants	\$87,191	\$39,158
<b>Running Total</b> State allotment = \$139,287	\$139,401	\$42,290
<b>TOTAL EXPENSE:</b>	<b>\$139,287</b>	<b>\$42,405</b>

# HCPS Merit Pay Plan Proposal



---

Award to three employment groups based upon aforementioned rationale and budget confines:

- Custodians
- Bus Drivers or Bus Riders
- Teacher Assistants

## Requirements:

- Be a fulltime employee (at least 30 hours per week)
- Be employed when merit pay is issued (January 2017).
- Satisfactory job performance/no letters of reprimand in 2015-2016
- Must have been employed full-time at least 136 school days during the 2015-2016 school year.

# Questions?



**HENDERSON COUNTY  
PUBLIC SCHOOLS**

# Hertford County Merit Based Bonus Proposal



## **Merit-Based Bonus 2016-2017**

### **Eligibility Requirements**

Employee groups **included**: Teacher Assistants, Child Nutrition Assistants, Child Nutrition Managers, Custodians, Secretaries, Data Managers, School Resource Officers, Central Office Employees

- Must be a permanent employee who was employed with the district on September 1, 2016 and still employed on March 31, 2017. The bonus will be adjusted pro-rata for part-time employees.
- No rating below satisfactory, above standard, on their end of year 2015-16 and mid year 2016-17 evaluation
- No letter of reprimand during the 2015-16 school year or the fall semester
- Recipients of short-term disability benefits who have not terminated employment are eligible.
- Employees on worker's compensation are eligible.
- Employees who are out on sick leave or approved extended absence are eligible.
- Employees suspended with pay are eligible.

### **Those who are not eligible:**

Employee groups **ineligible**: Superintendent, Assistant Superintendent, Principals, Assistant Principals, Bus Drivers, Bus Monitors, Any Substitutes or Tutors

- Temporary employees
- Have a rating below satisfactory on their end of year 2015-16 or mid year 2016-17 evaluation
- Have received a letter or letters of reprimand during the 2015-16 school year or the fall semester 2016-17
- Began work in the district after September 1, 2016 or leave before March 1, 2017

### **Payment Date**

Merit bonus will be paid March 31, 2017.

### **Merit-Based Bonus Amounts**

Eligible permanent employees in the included groups will receive a **\$650** bonus if they have worked in the district for the immediately preceding 10 years.

Eligible permanent employees in the included groups will receive a **\$450** bonus if they have worked in the district for the immediately preceding 5 years.

Eligible permanent Employees in the included groups will receive a **\$250** bonus if they have worked in the district for less than the immediately preceding 5 years.

# Hoke County Merit Based Bonus Proposal

## Merit-Based Bonuses S.L.2016-194, Sect. 36.1A

The General Assembly's Appropriations Act (House Bill 1030) contained a provision for merit pay for certified and non-certified employees. Hoke County's allocation is \$132,460 provided only to fund merit pay for state-paid "non-certified employees." A significant stipulation of the funding is that it cannot be "across the board."

Thus, Hoke County's proposed plan was developed around the guidelines below:

1. Per the language from the General Assembly merit pay will only be paid to employees who are not paid on the teacher salary schedule. "Teachers" include teachers, school counselors, school social workers, psychologists and nurses paid on the teacher salary schedule or anyone else whose position requires placement on the teacher salary schedule. The merit pay will not be paid to any central office administrators, building administrators or any personnel who receives the local 6% supplement. Hoke County's building administrators and central office administrators agreed that the bonus should be given to our non-certified staff.
2. The merit pay will only be paid to employees who worked for Hoke County Schools prior to June 30<sup>th</sup>, 2016. The merit pay will be distributed in December 2016. The merit pay will only be paid to employees who are employed at the time of distribution. The merit pay is not subject to retirement.
3. The merit pay will be paid to "non-certified employees" who were employed at schools that "met or exceeded growth" for the 2015-2016 school year. We are proud that all of our schools "met or exceeded growth" in the 2015-2016 school year and it is Hoke County School's belief that everyone contributes to the success of our students. The merit pay will be differentiated by the years of service with the state based on longevity.
4. The General Assembly's bill states that merit pay will only go to "state funded" employees. Hoke County will fund local positions with local funds, eg. child nutrition will be funded with child nutrition funds, maintenance with maintenance funds, etc.
5. The merit pay will be distributed according to the following:

<u>Years of Service</u>	<u>Merit Pay based on Longevity</u>
0-5	\$300.00
6-10	\$400.00
11-15	\$500.00
16-20	\$600.00
21-25	\$700.00
25+	\$800.00

# Hyde County Merit Based Bonus Proposal

# Merit Pay Bonus Allocation for Non Educators

## **I. Background:**

The State Board of Education approved the allocation method for the merit based bonus appropriated in SL 2016-94 Section 36.A.1. Hyde County School has received an allocation of \$24,029.00 for fiscal year 2016-17 to be paid to employees hired during the 2015-2016 school year.

Each LEA must have a locally approved plan that determines the distribution of the merit pay bonus. According to the Appropriations Act, the bonus shall:

- Be distributed based on a locally approved plan
- Not be distributed across the board
- Not be paid to certified teacher or instructional support
- Be paid to state funded personnel only

Based on the total amount allocated by the state, the total amount available to each individual if they were to receive their full share as an across the board merit bonus would be approximately \$393.92. **There are 51 full-time and 10 part-time employees that fall under the “non-educator” category.**

## **II. The Plan:**

The Hyde County Board of Education believes that every full time and part-time employee plays a valuable role in the overall function and service of the educational system. Part-time employees will receive a prorated merit bonus payment based on their percent of work as compared to a full time employee. As such, and knowing the stipulation that there cannot be an across the board distribution of Merit Pay Bonus funds, the Board approves that the funds be distributed based on the following formula:

### **A. 100% share if the employee has an overall rating between:**

- Eight to seven if a principal or
- Five to four if a classified employee (central office, teacher assistant, clerical and support services – child nutrition, custodial, maintenance, transportation, etc.

### **B. 66% share if the employee has an overall rating between:**

- Four to six if a principal or
- Two to three if a classified employee (central office, teacher assistant, clerical and support services – child nutrition, custodial, maintenance, transportation, etc.

### **C. 33% share if the employee has an overall rating between:**

- Two to three if a principal or
- One if a classified employee (central office, teacher assistant, clerical and support services – child nutrition, custodial, maintenance, transportation, etc.
- Had an acceptable attendance record as indicated by their immediate supervisor or designee during the 2015-2016 school year.

**D. 0% share if the employee has an overall rating of :**

- Zero for principals or
- Zero for classified employee (central office, teacher assistant, clerical and support services – child nutrition, custodial, maintenance, transportation, etc.

**III. Additional conditions as required for local policy:**

- Amounts - The amount each eligible employee shall receive shall be based on the overall guidance as outlined in Section I
- Performance - Performance shall remain as outlined and approved as in Section II
- Timeline - Timeline shall remain as outlined and approved as in Section III
- Special Conditions:
  - Only employees hired on or before January 1, 2016 or who have FY 2015-2016 performance evaluation are eligible
  - Employees who separate from State service with a break in service, are not eligible

**IV. Timeline:**

**November 2016** - Presentation to Board of Education for review, discussion and possible acceptance of Merit Pay Bonus Allocation plan.

Distribute the list of eligible employees to the immediate supervisors or designee for their review and final recommendations.

**November 2016** - Immediate supervisors return completed and signed recommendations to the Superintendent for final review who will in turn forward to the finance department.

**December 2016** - Distribution of Merit Pay Bonus in the December check.

**Note:** Exact dates will be set for each month after receiving information from finance on number of eligible employees

**V. Review, Verification, and Payment**

- The Superintendent is to submit the names of eligible employees to each immediate supervisor or designee for verification of performance rating, attendance and disciplinary record.
- Each supervisor is to review the list of employees and return the completed form to the office of the Superintendent by December 5, 2016.
- The superintendent is to review the submitted lists and in turn share with the Chief Finance Office to prepare for payment.
- The Chief Finance Officer is to prepare payment to be distributed in the December check.

**Approved by the Hyde County Board of Education at its November 1, 2016 meeting.**

### Merit Bonus Matrix

Employee Name: \_\_\_\_\_ Position: \_\_\_\_\_ Site: \_\_\_\_\_

Criteria	Above standard (Exceptional)	At standard (Acceptable)	Below (Unacceptable)			
2015-16 Attendance	Absent 0-4 days 1.5 points	Absent 5-10 days .5 points	Absent 11+ days 0 points			
2015-2016 School Performance Grade	A – 2 points	B – 1.5 points	C – 1 point	D - .5 point	F – 0 point	
2015-16 School Performance – Growth	Exceeded Expected Growth – 1 point	Met Expected Growth - .5 point	Did Not Meet Expected Growth – 0 points			
2015-16 Evaluation	Proficient or higher in all categories/standards with a minimum of 2 points	All proficient or at standard 1 point	At least one area below proficient/standard 0 points			
2015-16-present Performance	No discipline letters, memos, action plans 1.5 points	Discipline letters, memos 1 point	Action Plan, Discipline letters/memos 0 points			
<b>Total Points Earned By category</b>						
					Grand total	

Bonus Amount Key:	Eligible Groups:
8-7 points = 100% 6-4 points = 66% 3-1 points = 33% 0 point = 0%	School Based Administrators
5-4 points = 100% 3-2 points = 66% 1 point = 33% 0 point = 0%	Central Office Staff Teacher Assistant Clerical Staff Support Services/Operations Child Nutrition Custodial Maintenance Transportation Other

\*Absences based on sick leave and leave without pay. Excludes Family Medical Leave Act (FMLA), Short Term Disability (STD), & Worker's Comp absences

\* Information for Principals only in addition to the three other qualifiers.

Supervisor Verification Signature: \_\_\_\_\_





# Iredell - Statesville Schools

Together, Ensuring *Student Success* by Igniting a *Passion* for Learning

## Iredell-Statesville Schools Merit-Based Bonus Plan

The Iredell-Statesville Schools Board of Education will award one-time merit-based bonuses to eligible employees in March 2017 in accordance with the plan outlined here and North Carolina Session Law 2016-94, section 36.1A. To be consistent with law, the allocation of these one-time bonuses will not be across-the-board. The amount of bonus awarded will not be added to the employee's ongoing base salary and will not be considered compensation for retirement purposes.

### 1. ELIGIBILITY

To be eligible for a one-time merit-based bonus, an employee must meet the requirements established below.

#### 1. Position Requirements

- **Position Categories:** Eligible position categories for the merit-based bonuses are all classified non-educators, including teacher assistants, bus drivers, office support personnel, custodians, occupational therapists, maintenance, technology, transportation, child nutrition, prime time as well as principals and assistant principals. Iredell-Statesville Schools will evaluate all eligible positions whether paid from state, local, federal or other funding sources to determine the amount of additional funds needed to support the merit-based bonuses. Any position not explicitly included in the above list identified as potentially eligible for the merit-based bonus may be reviewed by executive cabinet to determine eligibility.
- **Terms of Service:** The employee must have been employed in an eligible position on January 15, 2016 and remain employed with Iredell-Statesville Schools, without a break in service, through February 1, 2017. Individuals must be employed permanent part-time or full-time position, working at least 20 hours or more in the eligible position category to be considered for the part-time bonus and 30 hours or more for the full-time bonus.
- **Excluded Position Categories:** Central Office Administrators (director level and above) are excluded from eligibility for merit-based bonuses. Rehired retirees, substitutes, even if serving temporarily in an eligible position, are excluded from eligibility for merit-based bonuses. Teachers and instructional personnel paid on the teacher salary schedule are not eligible for merit-based bonuses pursuant to North Carolina Session Law 2016-94.
- **Leaves of Absence:** Employees on a leave of absence or short-term disability must have worked at least six months in the 2015-2016 school year and must have an evaluation completed by their supervisor either prior to or upon their return. All requirements must be met and bonuses paid prior to the end of the 2016-2017 fiscal year.
- **Separations:** Employees who separate from Iredell-Statesville Schools prior to February 1, 2017 are not eligible for the merit-based bonus pay.
- **Transfers:** When an employee transfers from one position to another, the employee must have been in a qualifying position by January 15, 2016 to be eligible for the bonus. The transferring employee must also have been evaluated on an eligible position for at least six months and meet all other criteria requirements regarding performance.



## 2. Criteria Requirements

The merit-based bonus will be determined by two criteria – evaluations and performance. To receive the flat bonus amount, eligible employees must meet the following requirements:

- Evaluations – All standards must be rated standard/proficient **AND** at least one area above standard/accomplished for the 2015-2016 school year; **AND**
- Performance – No disciplinary action plans or letters can be on file (in Human Resources or within the school/department) from July 1, 2015 until February 1, 2017.

The employee must meet all criteria to receive the bonus based on a rubric completed by the direct supervisor. All evaluations covering the time period on which the bonuses are assessed must be completed by December 20, 2016. (Note: Classified personnel are evaluated on a yearly calendar.)

## 3. AMOUNT OF BONUS

The superintendent shall ensure that the total amount of funds awarded do not exceed the amount of funds provided by the state for the purpose of providing merit-based bonuses. Bonuses shall be allocated as follows:

- Eligible Full-Time Employees will be awarded a flat gross amount of \$360.00 for meeting all criteria
- Eligible Part-Time Employees will be awarded a flat gross amount of \$180.00 for meeting all criteria

All merit-based bonuses will be paid by March 31, 2017.





## Merit Pay Bonus Plan

### **I. Background:**

The State Board of Education approved the allocation method for the merit based bonus appropriated in SL 2016-94 Section 36.A1. Mooreville Graded School District has received an allocation of \$64,995 in state funds for fiscal year 2016-17.

Each LEA must now have a locally approved plan that determines the distribution. The bonuses shall:

- Be distributed based on a locally approved plan
- Not be distributed across the board
- Not be paid to certified teacher or instructional support
- Be paid to state funded personnel only unless other funds are utilized
- Pro-rated on percent of employment in the 2015-16 school year
- Employees hired after July 1, 2015 will be eligible for a pro-rata share based on length of employment during the 2015-16 fiscal year

Based on the total amount allocated by the state, the total amount available to each individual if they were to receive their full share would be approximately \$390.00. It is now the task of the MGSD Board of Education to develop and approve the plan for distribution.

### **II. Proposal:**

The MGSD Board of Education believes the every employee plays a valuable role in the overall function and service of the educational system. Merit pay will be distributed to staff classified in the 2015-16 school year as: teacher assistants, custodial, bus driver, clerical, maintenance, school nutrition, BASP, technology and other noncertified staff. As such, and knowing the stipulation that there cannot be an across the board distribution of Merit Pay Bonus funds, the Board proposes the funds be distributed based on the following formula:

Employees identified to receive the Merit Pay Bonus, shall receive a full share in proportion to their percentage of time employment based on the following:

100% share if the employee meets all of the following:

- Has no rating below “At Standard” or Proficient” on any final rating as noted by their immediate supervisor for the 2015-2016 school year,
- Had no letter of reprimand placed into their personnel file during the 2015-2016 school year,
- Had an acceptable attendance record as indicated by their immediate supervisor during the 2015-2016 school year.

66% share if the employee meets 2 of 3 of the following:

- Has no rating below “At Standard” or Proficient” on any final rating as noted by their immediate supervisor for the 2015-2016 school year,
- Had no letter of reprimand placed into their personnel file during the 2015-2016 school year,
- Had an acceptable attendance record as indicated by their immediate supervisor during the 2015-2016

33% share if the employee meets 1 of 3 of the following:

- Has no rating below “At Standard” or Proficient” on any final rating as noted by their immediate supervisor for the 2015-2016 school year,
- Had no letter of reprimand placed into their personnel file during the 2015-2016 school year,
- Had an acceptable attendance record as indicated by their immediate supervisor during the 2015-2016

0% share if the employee meets 0 of 3 of the following:

- Has no rating below “At Standard” or Proficient” on any final rating as noted by their immediate supervisor for the 2015-2016 school year,
- Had no letter of reprimand placed into their personnel file during the 2015-2016 school year,
- Had an acceptable attendance record as indicated by their immediate supervisor during the 2015-2016

### **III. Suggested Timeline:**

November 2016 – Presentation to Board of Education for review, discussion and possible acceptance of Merit Pay Bonus Allocation plan.

Distribute the list of eligible employees to the immediate supervisors for their review and final recommendations.

December 2016 – Immediate supervisors return completed and signed recommendations to the Superintendent for final review who will in turn forward to the finance department.

January 2017 – Distribution of Merit Pay Bonus in the January check.

Employee Name: \_\_\_\_\_

Position: \_\_\_\_\_ Site: \_\_\_\_\_

<b>Criteria</b>	<b>Above standard</b>	<b>At standard</b>	<b>Below</b>
<b>2015-16 Attendance</b>	Absent 0-5 days  1 point	Absent 6-10 days  0 points	Absent 11+ days  0 points
<b>2015-16 Evaluation</b>	Proficient or higher in all categories/standards with a minimum of 1 area above standard  1 point	All proficient  0 points	At least one area below standard  0 points
<b>2015-16 Performance</b>	July 1 - June 30 No discipline letters, memos, action plans  1 point	Discipline Letters, memos  0 points	Action Plan, discipline letters/memos  0 points
<b>Total Points Earned</b>			

\*Absences based on sick leave and leave without pay. Excludes FMLA, STD, & Worker's Comp absences

**Bonus Amount Key:**

1 points = \$130.00

Supervisor Verification Signature: \_\_\_\_\_



# JACKSON COUNTY PUBLIC SCHOOLS

## Merit-Based Bonus for Non Educators

### House Bill 1030 SL 2016-94

Section 36.1A authorizes the local Board of Education to award one-time merit-based bonuses to State-funded personnel serving as school-based administrators, central office personnel, and non-certified personnel. Jackson County Schools has 279 employees serving in the roles defined by this legislation. Of those 279 employees only 133 are state funded and 146 are funded by other sources.

The local Board of Education approves the following plan to award one-time merit based bonuses. Due to the fact the legislation only provides an allocation for State-funded positions, the Board of Education hereby authorizes the use of local funds for other eligible employees defined by this plan. It is the intent of this Board to thank each of its eligible employees regardless of funding source.

#### I. Eligibility Requirements

- a. Must be employed as of October 1, 2016.
- b. Original employment date is on or before January 1, 2016.
- c. Must have been evaluated at the end of the 2015-2016 school year.
- d. Must be classified permanent full-time as of October 1, 2016. Permanent full-time is defined as 30 hours or more per week.

#### II. Special Conditions

- a. Employees serving in a dual capacity are not eligible for consideration in both positions. Consideration will be based upon their primary position and the performance evaluation in that position. However, hours of employment in both positions will be used in making the eligibility determination.
- b. Employees on an approved leave of absence for the 2015-2016 school year will not be awarded the merit bonus.

#### III. Criteria and Amount(s) to be Awarded for Non-Certified Personnel

- a. Merit bonuses will be based on meeting or exceeding overall standards on the employee's 2015-16 evaluation.
  - i. Exceeded Standard Overall Rating \$ 325
  - ii. Met Standard Overall Rating \$ 225
  - iii. Did not Meet Standard Overall Rating \$ 0

**IV. Criteria and Amount(s) to be Awarded for Certified Central Office Personnel**

- a. Merit bonuses will be based on successful completion of goals included in the 2015-2016 Professional Development Plans.
  - i. Successful Goal Completion \$325
  - ii. Unsuccessful Goal Completion \$ 0

**V. Criteria and Amount(s) to be Awarded for School Based Administrators**

- a. Merit bonuses will be based on 2015-2016 School-wide Growth Data.
  - i. Exceeded Expected Growth \$ 3,000
  - ii. Met Expected Growth \$ 2,500
  - iii. Did Not Meet Expected Growth \$ 0

**VI. Payment Date**

- a. The one-time merit bonus will be paid to eligible employees in October 2016.

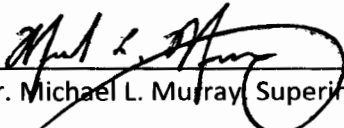
**VII. Legislated Restrictions**

- a. Requires the local board to adopt a policy as to how to award the bonuses.
- b. Shall not pay the bonus as an across the board bonus.
- c. Only state funded personnel are eligible for a bonus from the State funds.
- d. Bonus is not subject to retirement.
- e. Bonus is one-time payment (non-recurring).
- f. Educators are not eligible. Any teacher or instructional support personnel who is paid from the certified educator salary schedules is not eligible. This includes, but not limited to: teachers, school counselors, psychologist, nurses, audiologists, speech language pathologists, media coordinators, social workers, etc.

Approved this 20<sup>th</sup> day of September 2016.

  
\_\_\_\_\_  
Mr. Ken Henke, Chairperson

9-20-16  
\_\_\_\_\_  
Date

  
\_\_\_\_\_  
Dr. Michael L. Murray, Superintendent

9/21/16  
\_\_\_\_\_  
Date

# Johnston County Merit Based Bonus Proposal



## **Merit-Based Bonus for Non Educators**

### **Merit-Based Bonus- House Bill 1030 (Section 36.1A.(a))**

The North Carolina General Assembly's Appropriations Act (House Bill 1030) contained a provision for merit pay for "non-educators." Nonrecurring funds for the 2016-2017 fiscal year have been authorized to provide a one-time merit-based bonus to state-funded personnel in accordance with eligibility policies adopted by the employing agencies. Additionally, per legislation, the merit-based bonus shall not be used for across-the-board allocations. The merit bonus will be based on performance levels for eligible employees.

Categories of Staff Eligible to Receive Bonus - Locally and federally funded eligible employees will receive the merit bonus from local funding as approved by the Board of Education.

- Office Support
- Custodians
- Teacher Assistants
- Bus Drivers
- Central Classified Staff (excludes individuals paid on or above the JCS Salary Grade 76 at the time the bonus is awarded)

### Performance Criteria

- Employees who receive less than a "Meets Standard" rating or satisfactory on any function or standard on a performance evaluation plan for 2015-2016 will not be eligible to receive the merit bonus. Therefore, the end-of-year evaluation must not include any "Needs Improvement" ratings. In addition, there must not be any documented concerns following the completion of the end-of-year evaluation.

### Employment Criteria

- Employed in a permanent capacity (part-time/full-time) on or before January 1, 2016, and who remain continuously employed until the time the bonus is awarded
- Employees on paid or unpaid LOA at the time the bonus is issued are eligible for the compensation bonus granted they were in active service at least one day since January 1, 2016, and meet all other criteria

### Amount of Bonus

- \$350 for eligible full-time employees
- Permanent part-time employees shall be granted a pro-rata amount of the compensation bonus based on the average number of hours worked.

### Payment Date

- February 2017



# Jones County Public Schools

320 West Jones Street, Trenton, NC 28585

Michael T. Bracy, Ed.D., Superintendent  
Telephone: 252-448-2531 – Fax: 252-448-1394

## 2016-17 JCPS Merit Pay Bonus Allocation for Non Educators

### **Background**

The 2016 General Assembly ratified on July 14, 2016, HB 1030 (Session Law 2016-194), and signed into law by Governor Pat McCrory, provides funding for a one-time lump sum merit-based bonus for non-educators. Merit based bonuses are for non-educators, including school based administrators, central office and non-certified personnel. Educators (teachers and instructional support personnel paid on the teacher salary schedules) are **not** eligible. LEAs shall provide to DPI details of how these funds are distributed by district and school. Funding by local education agencies (LEAs) was approved by the State Board of Education in August 2016. Jones County Public Schools received an allocation of **\$30,122** out of \$17,242,627 for the 2016-2017 school year.

### **Legislated Restrictions**

LEAs shall adhere to the following per the legislation:

- Require the local board to adopt a policy (plan) as to how to award the bonuses
- Shall not pay the bonus as an across the board bonus
- Only state funded personnel are eligible for a bonus from the State funds
- Bonus is not subject to retirement
- Bonus is one-time payment (non recurring)

### **JCPS Proposal**

Although bonuses can be awarded to many different employee groups, JCPS has decided to restrict merit-pay bonuses only to a small group of classified staff. After meeting with district and school leadership, it was decided that merit bonuses would only be awarded to clerical staff (school and central office), technology technicians, maintenance, teacher assistants, school nurses, and permanent bus drivers (if funds were available). To receive the maximum amount, these individuals must have been employed for the 2015-16 school year and still employed at the time of the plan approval by the local board. Those employed for less than the full academic year (2015-16) will receive a bonus prorated based on the number of months employed. In addition, employees on approved leave of absences (LOA) with six (6) months of cumulative work will also qualify for merit bonuses.

The Jones County Board of Education recently approved salary schedules for the following staff for the 2016-17 school year: child nutrition, custodians, and bus drivers. This resulted in pay increases for these individuals. Therefore, the leadership team thought it to be more beneficial not to award these groups merit bonuses since they just received a permanent salary increase.

**Note: Permanent bus drivers are included in the merit bonus because of the minimal pay due to not working full time hours and not receiving other employee benefits.**

Jones County Public Schools is a dedicated 21<sup>st</sup> century learning community committed to providing rigorous, relevant, and responsive instruction.

**Criteria for Receiving Merit-based Bonus**

- Longevity
- Performance as determined by the 2015-16 evaluations
- Disciplinary Actions

Points will be awarded in the each of the aforementioned criteria to eligible employees. The table below illustrates how points will be awarded.

Criteria	1	2	3	Total Points
Longevity		1 to 12 years of service with JCPS	13+ years of service with JCPS	
Performance Evaluations		Proficient or above on at least 2 of the five evaluation standards	Proficient or above on at least 3 of the 5 evaluation standards	
Disciplinary Actions  (Must not have any reprimand letters during the 2015-16 school year)			No letters of reprimand in personnel file during the 2015-2016 school year	

Based on the allotted dollar amount for JCPS, each eligible employee has the potential to earn \$614.73. There are 49 eligible employees. The total allotted of \$30,122 divided by 43 equals \$614.73.

Funds will be distributed based on the following point system:

9 points = 100% = \$614.73                      6 points = 67% = \$411.86  
 8 points = 89% = \$547.11                      5 points = 56% = \$344.25  
 7 points = 78% = \$479.49                      4 points = 44% = \$270.48

The balance of funds will be distributed equally among the permanent bus drivers (non-TAs) that were employed during the 2015-16 school year.

**Proposed Timeline of Distribution**

September 2016- Committee determines eligible positions and determines criteria.

October 2016- Human resources identifies eligible employees and distribute rubric to immediate supervisors for verification.

November 2016

Presentation to the Board of Education for review, discussion and approval of Merit Pay Bonus Plan.

Immediate supervisors will make final verification and recommend to the superintendent for final review and approval. Information will be forward to the finance department for payroll processing for November payroll.

**Payment to Employees: November 30, 2017**

*\*Board Approved on November 21, 2016*

Jones County Public Schools is a dedicated 21<sup>st</sup> century learning community committed to providing rigorous, relevant, and responsive instruction.

**Lee County Schools**  
**Non-Educator Merit Based Bonus Plan**

The Board will award one-time merit based bonuses to eligible employees prior to June 30, 2017 pursuant to North Carolina Session Law 2016-94, section 36.1A and in accordance with the plan outlined herein. To comply with law, the allocation of these one-time bonuses will not be across-the-board. The amount of bonus awarded will not be added to the employee's ongoing base salary and will not be considered compensation for retirement purposes.

A. Eligibility

To be eligible for a one-time merit based bonus, an employee must meet the requirements established below.

1. Position Eligibility

To be eligible the employee<sup>1</sup> must have been continuously employed by the district, as follows:

- Employed by December 31, 2015 and in effect through the date of the bonus payment. Approved leaves of absence will not make the employee ineligible for the bonus;
- Working a minimum of thirty (30) hours per week during a regular weekly schedule; and
- Bonus will only be paid on main assignment (not supplements, bus, and or extra pay)
- Please note – per General Statute - Educators are not eligible. (*Merit based bonuses for non-educators, including school based administrators, central office and non-certified personnel.*)

B. Amount of Bonus

The Superintendent shall ensure that the total amount of funds awarded do not exceed the amount of funds provided by the state; all other funding sources will be responsible for their portion of the merit based bonuses. Bonuses shall be allocated as follows as long as the preceding criteria are fulfilled:

- 0 – 9.999 Years = \$225
- 10 – 19.999 Years = \$350
- 20+ Years = \$475

C. Timeline

- This plan will be submitted to the Division of School Business Services at NCDPI by the Chief Finance Officer no later than December 14, 2016;
- A comprehensive list of eligible employees will be submitted to the Superintendent's office no later than June 15, 2017;
- Payroll is to prepare payment to be distributed no later than June 30, 2017.

D. Plan Sunset

This plan is effective for the 2016-17 school year only.

---

<sup>1</sup> "Employee" as defined herein does not include persons under a service agreement or other contract.

**LENOIR COUNTY SCHOOLS  
MERIT BASED ONE-TIME BONUS  
BOARD APPROVED PLAN**

Merit Based One-Time Bonus

Per legislation, eligible employees include principals, assistant principals, administrators and all classified staff which include teacher assistants, bus drivers, custodians, office support, child nutrition, maintenance, transportation, environmental and technology staff.

Employees employed in state funded positions will be paid from state funds. Employees paid from non-state funds will be paid from their funding and/or program source.

Employees must have been employed prior to July 1, 2016 and employed as of September 1, 2016 in a full-time permanent or part-time position and work at least 20 hours per week.

Employees must have met or exceeded standards on the 2015-2016 performance evaluations. Any employee on a conditional evaluation does not qualify for the bonus.

Employees will receive a 1% bonus if they have less than 10 years of state service or a 1.5% bonus with 10 or more years of state service as of September 1, 2016.

The bonus will be paid in December 2016.

Employees on paid or unpaid LOA (Leave of Absence) effective September 1, 2016, are eligible for the bonus contingent on their 2015-2016 performance evaluation.

# Lincoln County Schools

## Merit – Based Bonus Proposal

### Background

The 2016 General Assembly (GA) ratified on July 14, 2016 HB 1030 (Session Law 2016-194), which provides, amongst other items, a one-time merit-based bonus for the 2016-17 fiscal year. The one-time merit-based bonus will be paid out between the months of January and May, 2017. The GA has only funded this bonus for State-paid employees. Lincoln County Schools (LCS) has been charged by the GA to develop a plan to distribute the State funds based on certain criteria. Local Education Agencies are allowed to decide if employees in other Federal and Local payroll codes will be included in this one-time bonus.

The following is our proposal for selecting employees for the one-time merit-based bonus of 2016-17.

### Staff qualifying criteria

- 1- This plan includes grouping eligible employees into two categories: (1) Instructional/Teacher Assistants and (2) All other classified employees and School-based administrators. Employees in Tier 1 would receive up to a \$500.00 gross amount and employees in Tier 2 would receive up to a \$250.00 gross amount.
- 2- Employees with permanent (full-time/part-time), probationary, and time-limited appointments are eligible, including those permanent full-time employees who work a 10, 11, or 12-month schedule.
- 3- This eligibility applies to both qualified hourly and salaried classified employees as well as School-based administrators.
- 4- Employees (certified and classified) that exceed a monthly gross pay amount of \$3,500.00 AND are considered a supervisor or director are not eligible for the one-time merit-based bonus.
- 5- Teachers and other employees paid on the Salary Schedule per Section 9.1, are not eligible to receive the merit-based bonus. This includes employees commonly referred to as a teacher, district administrators and supervisors, and certified staff that support instruction throughout the district.
- 6- Employees hired on or before January 1, 2016 and who have a 2015-16 performance evaluation and have a rating of “Meets” or “Exceeds” expectations are eligible.
- 7- Employees that have been disciplined with a letter of warning or reprimand from July 1, 2015 to November 30, 2016 are not eligible.
- 8- Employees must have at least six (6) months of cumulative employment under an evaluation plan to be eligible. Employees without an evaluation rating are not eligible.
- 9- Employees on Leave of Absence (LOA) (regardless of type) must have at least six (6) months of cumulative work under an evaluation plan in order to be eligible to receive a performance rating. If an employee is on LOA during the time of the annual evaluation period, the supervisor must rate the employee upon return from LOA during the 2016-17 evaluation window.

- 10- Employees who separate from LCS service with a break in service during July 1, 2015 to November 30, 2016, are not eligible. The only exception to this would be those employees that were subject to Reduction in Force at the end of the 2015-16 school year AND that were eventually rehired in a similar position for the 2016-17 school year.

**Procedural information regarding payment**

- 11- Per legislation, the merit-based bonus shall not be used for across-the-board allocation. The amount of the bonus will be based on the role and performance for eligible employees.
- 12- For those employees that are dual-employed with a permanent bus route and either a Teacher Assistant, Custodial, or Child Nutrition position, the pay will be pro-rated based on the roles.
- 13- Any classified employee that qualifies for the one-time merit-based bonus will be paid based on their Full Time Equivalent status. If a classified employee works 6 hours a day for 10 months, then that employee would be compensated at 80% of the maximum bonus for such position. If an employee works 7.5 hours or greater per day, then their compensation would be 100% of the allocated bonus.
- 14- Regardless of months worked (10, 11, or 12) all employees that qualify for this bonus will receive the same amount per tier prorated based on hours worked per day.
- 15- All bonus monies are subject to FICA but will not be applied to retirement earnings per the GA parameters.
- 16- LCS feels that all employee pay groups should be compensated; not just the state funded positions.

# Macon County Merit Based Bonus Proposal



## **MERIT-BASED BONUSES**

---

The Macon County Board of Education believes that every employee plays a valuable role in the overall function and service of the educational system. However, in accordance with the plan outlined here and North Carolina Session Law 2016-94, section 36.1A the board will award one-time merit-based bonuses to eligible employees in November, 2016. To be consistent with law, the allocation of these one-time bonuses will not be across-the-board. The amount of bonus awarded will not be added to the employee's ongoing base salary and will not be considered compensation for retirement purposes.

### **A. ELIGIBILITY**

To be eligible for a one-time merit-based bonus, an employee must meet the requirements established below.

#### **1. Position Requirements**

**Employees eligible for the Merit-Based Bonus must be in a state funded position and either a bus driver or full time, non-certified employee. In order to be eligible an employee must have been an active employee on January 1, 2016 and still active as of September 1, 2016. Teachers and instructional personnel paid on the teacher salary schedule are not eligible.**

#### **2. Performance Requirements**

**In order to receive the Merit-Based Bonus in 2016-17 a qualifying state paid employee must have at least one year of experience in the Macon County School system and have received an at-standard evaluation or above on their most recent evaluation. Additionally, regular attendance is required for the full bonus.**

### **B. AMOUNT OF BONUS**

The superintendent shall ensure that the total amount of funds awarded do not exceed the amount of funds provided by the state for the purpose of providing merit-based bonuses. Bonuses shall be allocated as follows:

**A qualifying state paid employee with 1-10 years of satisfactory evaluations and an at-standard or above on their most recent evaluation will receive a bonus of \$250.**

**A qualifying state paid employee with 11-20 years of satisfactory evaluations and an at-standard or above on their most recent evaluation will receive a bonus of \$500.**

---

---

**A qualifying state paid employee with 21-29 years of satisfactory evaluations and an at-standard or above on their most recent evaluation will receive a bonus of \$750.**

**A qualifying state paid employee with 30+ years of satisfactory evaluations and an at-standard or above on their most recent evaluation will receive a bonus of \$1000.**

**All bonuses will be reduced by \$50 if the employee missed more than 5 days of non-FMLA leave from January 1, 2016 through November 1, 2016. An employee's use of earned annual leave will not exclude them from the bonus.**

**The bonus amount each eligible employee shall receive shall be based on the percentage of employment.**

# Madison County Merit Based Bonus Proposal

## **Merit-Based Bonus Plan**

---

---

The Madison County Board of Education will award one-time merit-based bonus to eligible employees in accordance with the plan outlined here and North Carolina Session Law 2016-94, section 36.1A.

The Madison County Board of Education understands:

- To be consistent with law, the allocation of these one-time bonuses will not be across-the-board.
- The amount of bonus awarded will not be added to the employee's ongoing base salary and will not be considered for compensation for retirement purposes.

### **A. ELIGIBILITY**

To be eligible for a one-time merit-based bonus, an employee must meet the requirements established below.

#### **1. Position Requirements**

Reg. Ed. Teacher Assistants, School Clerical Staff and Custodians who were employed full time in 2015-2016 school year and who are still currently employed full time with Madison County Public Schools will be eligible for a one time merit bonus based in accordance with S.L. 2016-94, sec. 36.1A. Any employees who retired, resigned, or took a leave of absence during the 2015-2016 school year are not eligible for a one-time merit-based bonus.

#### **2. Performance Requirements**

1. Employees who do not have any negative personnel actions from July 1, 2015 through June 30, 2016.
2. Employee must have been hired by January 1, 2016.
3. Any employees who retired, resigned or took a leave of absence during the 2015-2016 school year are not eligible for a one-time merit-based bonus.
4. Must remain employed at the time the merit pay is issued (December 2016).
5. Full time employees are eligible for a "full share".
6. Part time employees are eligible for a "half share".

Payment will be made in December. The full share will be \$775 and the half share will be \$387.50.

## Merit- Based Bonuses Plan – Martin County Schools

The Martin County Board of Education will award one-time merit-based bonuses to eligible employees in March, 2017 in accordance with the plan outlined here and North Carolina Session Law 2016-94, section 36.1A.

The Martin County Board of Education understands:

- To be consistent with the law, the allocation of these one-time bonuses will not be across-the-board.
- The amount of bonus awarded will not be added to the employee's ongoing base salary and will not be considered compensation for retirement purposes.

### **A. Eligibility**

To be eligible for a one-time merit bonus, an employee must meet the requirements established below.

#### 1. Position Requirements

- a. Employees must be a state-funded non-certified employee with permanent full-time or part-time status working a 10, 11, or 12 month schedule.
- b. No funds are provided by the state for federal or locally funded employees. All federal or locally funded employees that meet the merit-based bonus requirements will be paid from appropriate federal or local funds.
- c. The merit-based bonus applies to current employees that completed a full term of service as follows:
  - 10 month employees – August 17, 2015 – June 30, 2016
  - 11 month employees – August 1, 2015 – June 30, 2016
  - 12 month employees – July 1, 2015 – June 30, 2016Must be currently employed at the time of bonus payout to be eligible.
- d. Employees will not be eligible for the one-time merit bonus if they took a paid or unpaid leave of absence or received disability during the 2015-2016 school year or during the 2016-2017 school year prior to the disbursement of the merit based bonus.
- e. Permanent part-time employees will be paid a pro rata amount based upon the percentage of their employment. Bus drivers' percentage of employment will be calculated based on 3.5 hours per day.

## 2. Performance Requirements by Position

### Teacher Assistants

95% Attendance during the 2015-2016 School Year on Student days
5 or more complete years of service with Martin County Schools as of 6/30/2016
No disciplinary write ups for the 2015-2016 school year or the 2016 school year through December 31, 2016

### Custodians, Maintenance, Child Nutrition Workers, and Bus Drivers

Satisfactory or above on most current evaluation and/or a clean safety record
5 or more complete years of service with Martin County Schools as of 6/30/2016
No disciplinary write ups for the 2015-2016 school year or the 2016 school year through December 31, 2016

### Clerical and Technology

Satisfactory or above on most current evaluation
5 or more complete years of service with Martin County Schools as of 6/30/2016
No disciplinary write ups for the 2015-2016 school year or the 2016 school year through December 31, 2016

## B. Amount of Bonus

The total amount of \$53,795.00 will be distributed to non-certified employees meeting the eligibility requirements. Employees will receive merit-based bonus pay for each of the categories in which they are eligible at an amount of \$210.00 per category. Amounts will be tallied and for permanent part-time employees the eligible percentage will be tabulated.

Met all 3 Categories - Employees meeting all three of the categories will receive a full share in proportion to their percentage of employment or up to \$630.00.

Met 2 of the 3 Categories - Employees meeting two of the three categories will receive a 66% share in proportion to their percentage of employment. or up to \$420.00

Met 1 of the 3 Categories - Employees meeting one of the three categories will receive a 33% share in proportion to their percentage of employment or up to \$210.00.

Met 0 of the 3 Categories - Employees meeting zero of the three categories will not receive any share.

The total amount of funds awarded, \$53,795.00, will not exceed the amount of funds provided by the state for the purpose of merit-based bonuses for eligible State funded employees.



# McDowell County Schools

INSPIRING SUCCESS:

Student-centered, Mission-driven

November 14, 2016

## Merit Pay Bonus Plan

### Background: 36.1A Merit Based Bonus for Non-Educators

- School-based administrators, central office and non-certified personnel are the only personnel that are eligible based on this legislation.
- LEAs are required to provide NCDPI details of how these funds are distributed by district and school by December 1, 2016.
- The eligibility plan shall not provide an across-the-board bonus for this purpose.

### Employees who meet the following selected criteria will be eligible for the merit bonus.

1. Employees who are non-exempt based on FLSA guidelines.
2. Must be a permanent employee.
3. Must be in a state funded position.
4. Must have been employed since September 1, 2015.
5. Did not have a break in service from McDowell County Schools since September 2015.
6. Remain employed at the time the merit pay is issued.
7. Employees who do not have any negative personnel actions from July 1, 2015 through June 30, 2016.
8. All full-time and part-time non-exempt personnel:
  - full share for full-time permanent
  - half share for part-time permanent

<b>Eligible Staff:</b> (Full-time and part-time employees who meet the criteria listed above)
Instructional Assistants
Bus Drivers
Custodians
Office Support Personnel
Combination Employee (Instructional Assistant/Bus Driver)
Transportation/Maintenance/Technology



## **Charlotte-Mecklenburg Schools Merit-Based Bonus (600) December 2016**

A one-time merit-based bonus for non-educators, including school-based administrators, central office and non-certified personnel was approved in the 2016-17 North Carolina budget. Educators are not eligible for the bonus. Local Education Agencies (LEAs) shall provide details of how these funds are distributed by district and school to the Division of School Business at North Carolina Department of Public Instruction (NCDPI) by December 2016.

### **Legislated Requirements**

Per legislation, LEAs must submit a Board of Education (BOE) approved plan that includes the following:

- eligibility requirements,
- amount(s) to be awarded,
- payment date, and
- special conditions related to break in service, personnel transferring between LEAs, leave of absence or separations.

### **Recommended Plan for Awarding the Merit-Based Bonus**

Merit pay is a compensation approach to reward high performing employees. A one-time, merit based bonus will be paid in January 2017 for eligible employees in a state funded position. Employees in non-state funded positions who qualify for the merit-based bonus will be paid through the appropriate funding source.

### **Eligibility Criteria**

All employee groups, excluding educators, will be eligible for the merit-based bonus. This includes:

- School-based administrators
- School-based exempt (salaried) and non-exempt (hourly-paid) personnel
- Central office exempt (salaried) and non-exempt (hourly-paid) personnel, not paid on teacher salary schedules
- After School Enrichment personnel
- Cabinet members are eligible, but have elected not to receive the merit-based bonus

To be eligible for the merit-based bonus, an employee must have a completed 2015-16 performance evaluation, not be paid on the teacher salary schedule, and meet the conditions below:

- **New Hires:** To be eligible, personnel must have been employed no later than January 21, 2016 and evaluated for the 2015-16 school year.
- **Break in Service:** Personnel who separate from the LEA with a break in service between January 21, 2016 and the last day of the pay period in which payment is disbursed, are not

eligible. The only exclusion is if an employee was hired into a 2015-16 end of year position by January 21, 2016 and was re-employed by CMS by the 2016-17 first day of school for the employee group.

- **Leave of Absence (LOA):** Eligible personnel on paid or unpaid LOA at the time of payment are eligible for the merit-based bonus. CMS will reserve monies for personnel returning from LOA who meet the aforementioned performance requirements, if an employee returns from LOA on or before June 30, 2017 (fiscal year end).
- **Separations:** The merit-based bonus does not apply to employees separated from CMS service prior to the last day of the pay period in which payment is disbursed. Retirement is considered a separation.

The 2015-16 summative evaluation will be used to identify high performing employees. The employee must

- have a completed 2015-16 performance evaluation
- have an overall score of accomplished (3.5-4.4) or distinguished (4.5-5.0).

Charlotte-Mecklenburg Schools received a state allocation for state employees in the amount of \$1,385,032. Eligible personnel with an overall score of accomplished (3.5-4.4) will receive \$525 and eligible personnel with an overall score of distinguished (4.5-5.0) will receive \$725. Full-time employees will receive the full amount of the merit-based bonus. Eligible part-time employees working a minimum of 20 hours will receive a prorated amount.

Eligible exempt employees will receive payment on January 31 and eligible non-exempt employees will receive payment on January 20.

Eligibility criteria, payment amounts, special conditions, and payment dates were approved at the Charlotte-Mecklenburg Schools Board of Education meeting December 13, 2016.

## MERIT PAY PLAN MITCHELL COUNTY SCHOOLS

- Employees who are non-exempt based on FLSA guidelines.
- Must be a employed since July 1, 2015 in an LEA.
- Employees who do not have any negative personnel actions from July 1, 2015 to present.
- Must remain employed until the merit pay is issued.
- Employees will receive a flat rate share of merit based pay.
- Part-time employees will receive a % employed share of the merit pay.
- Employee must not have had a break in service from July 1, 2015 to present.
- Employee must be At Standard or above on evaluations



**441 Page Street • P.O. Box 427  
Troy, North Carolina 27371-0427  
PHONE: (910) 576-6511 • FAX: (910) 576-2044**

---

### MCS Merit Pay Policy

Pursuant to regulations set forth in the 2016-2017 budget of the state of North Carolina, MCS must institute a Merit Pay system for non-certified staff. The pay policy must be approved by the MCS and State Boards of Education. The following policy is in effect for the 2016-2017 year, effective for performance during the 2015-2016 year. Only non-certified and non-administrative personnel are eligible for the merit bonus.

#### **School-based Staff (3 Merit Components)**

Growth Status of School – No Growth = 50% of maximum  
Met Growth = 75% of maximum  
Exceed Growth = 100% of maximum

Personnel Evaluations – Any below proficiency = 0%  
Proficiency and above = 100%

Attendance Standards – 0-5 Absences = 100%  
6-9 Absences = 50%  
10+ Absences = 0%

#### **Examples (Assuming \$1200 maximum)**

Bill – School met growth, proficient on evaluation, 7 absences ( $\$1200 \times .75 \times 1 \times .5 = \$450$ )

Sarah – School exceeded growth, not proficient, 4 absences ( $\$1200 \times 1 \times 0 \times 1 = \$0$ )

Don – School exceeded growth, proficient on eval., 4 absences ( $\$1200 \times 1 \times 1 \times 1 = \$1200$ )

Emily – School did not meet growth, proficient, 5 absences ( $\$1200 \times .5 \times 1 \times 1 = \$600$ )

**Central Staff (3 Merit Components)**

Overall Growth – Fixed at 70% of maximum

Personnel Evaluations – Any below proficiency = 0%  
Proficiency and above = 100%

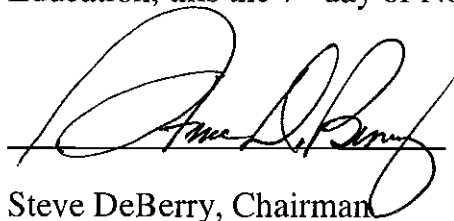
Attendance Standards – 0-5 Absences = 100%  
6-10 Absences = 50%  
10+ Absences = 0%

**Examples (Assuming \$1200 maximum)**

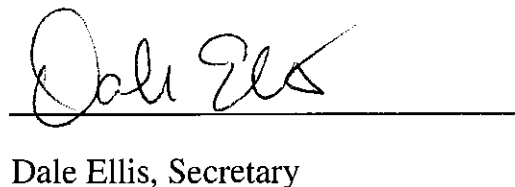
John – Growth fixed, proficient on evaluation, 7 absences ( $\$1200 \times .7 \times 1 \times .5 = \$420$ )

Denise – Growth fixed, proficient on evaluation, 3 absences ( $\$1200 \times .7 \times 1 \times 1 = \$840$ )

This merit pay policy is hereby approved by the Montgomery County Schools Board of Education, this the 7<sup>th</sup> day of November, 2016.



Steve DeBerry, Chairman



Dale Ellis, Secretary



MOORE COUNTY SCHOOLS  
CENTRAL ADMINISTRATIVE OFFICES  
PO Box 1180 – 5277 US HIGHWAY 15-501  
CARTHAGE, NORTH CAROLINA 28327  
[www.ncmcs.org](http://www.ncmcs.org)  
910-947-2976 Fax 910-947-3011

## Merit Pay Plan for Non-Educators

September 27, 2016

The General Assembly's Appropriations Act (House Bill 1030) contained a provision for merit pay for "non-educators" (see Appendix). Moore County Schools' allocation is approximately \$191,000, provided only to fund merit pay for state-paid "non-educators." A significant stipulation of the funding is that it cannot be "across the Board."

Thus, Moore County Schools proposed plan was developed around the guidelines below.

1. Merit pay will only be paid to employees who earn less than \$50,000 in base pay (not including local supplement or PSP differential).
2. Per the language from the General Assembly, merit pay will only be paid to employees who are "non-educators" and not paid on the teacher salary schedule. "Teachers" includes teachers, school counselors, school social workers, psychologists and nurses paid on the teacher salary schedule or anyone else whose positions requires placement on the teacher salary scale. Merit pay also will not be paid to any central office or building-level administrators.
3. Merit pay will be paid only to permanent employees who work at least 50%, i.e. at least 20 hours per week. For permanent part-time employees, the bonus shall be pro rata based on the number of hours worked as outlined below.
4. Merit pay will only be paid to employees who have worked for Moore County Schools at least one year as of August 15, 2016.
5. Merit pay will only be paid to employees who earned no "Needs Improvement" or "Unsatisfactory" ratings on their Summative Evaluation for 2015-2016.
6. Merit pay will be distributed with the December 2016 payroll. Merit pay will only be paid to employees who are employed at the time of distribution. Merit pay is not subject to retirement.
7. While the language in the General Assembly bill indicates that merit pay will only go to "state paid" employees, Moore County Schools will use savings from local vacant positions to also fund eligible employees paid from other non-state sources.
8. Merit pay will be distributed according to the following:

<b>Years of Service as of August 15, 2016</b>	<b>Merit Bonus</b>
1-5	\$200.00
6-10	\$400.00
11-15	\$500.00
16-20	\$600.00
21-25	\$700.00
25+	\$800.00

Moore County Schools merit pay plan was approved on October 17, 2016 by Moore County Schools Board of Education.

# Nash-Rocky Mount Merit Based Bonus Proposal



## MERIT-BASED BONUSES

---

---

*In accordance with S.L. 2016-94, sec. 36.1A, the board must award one-time merit-based bonuses to employees in state-funded positions in accordance with its eligibility “policy.” DPI has advised that a “plan” approved by the board in lieu of a formal policy is sufficient to meet this requirement.*

The board will award one-time merit-based bonuses to eligible employees in **January, 2017** in accordance with the plan outlined here and North Carolina Session Law 2016-94, section 36.1A.<sup>1</sup> To be consistent with law, the allocation of these one-time bonuses will not be across-the-board.<sup>2</sup> The amount of bonus awarded will not be added to the employee’s ongoing base salary and will not be considered compensation for retirement purposes.<sup>3</sup>

### A. ELIGIBILITY<sup>4</sup>

To be eligible for a one-time merit-based bonus, an employee must meet the requirements established below.

#### 1. Position Requirements

*The pool of employees who are potentially eligible for merit-based bonuses, include (1) Full-time employees (2) Paid from State funds only (state funds are provided only for state-funded employees). Teachers and instructional personnel paid on the teacher salary schedule are not eligible. (3) Employees must have a minimum of five (5) years of service with the district.*

#### 2. Performance Requirements

*Employees who have (1) an Attendance Rate of at least 90% for the preceding year, (2) any employee who has not received less than a satisfactory or less than a proficient rating on 20% of a performance evaluation plan for the 2015-2016 school year, and (3) any employee that has not received a disciplinary action will be eligible to receive a merit bonus.*

---

<sup>1</sup> S.L. 2016-94, sec. 36.1A, provides funding in the 2016-17 state budget for one-time merit-based bonuses to be given to state-funded school-based administrators, central office, and noncertified personnel. No funds are provided by the state for locally-paid employees, although the board could fund merit bonuses for locally-paid employees from local funds. Educators (certified teachers and instructional support) are not eligible for the bonus. The legislation does not establish a deadline for distribution of the bonus; school officials should consult DPI for appropriate guidance.

<sup>2</sup> Across-the board bonuses are not permitted. See S.L. 2016-94, sec. 36.1A.

<sup>3</sup> See S.L. 2016-94, sect. 36.1A(a).

<sup>4</sup> DPI issued guidance to LEA in a memo from Phillip Price sent via email to finance officers on September 14, 2016. (As of this writing, the memo is not publicly available) The memo indicates that local “policies” must clearly outline eligibility requirements; amount(s) to award; payment date; and special conditions related to breaks in service, employees transferring between LEAs, leave of absence, and separation. A subsequent memo from DPI issued to finance officers on September 23, 2016, clarified that a formal board policy is not necessary and that a board-approved “plan” is sufficient. Details of the local plan or policy must be submitted by December 20, 2016, to the Division of School Business at DPI.

---

**B. AMOUNT OF BONUS**

The superintendent shall ensure that the total amount of funds awarded do not exceed the amount of funds provided by the state for the purpose of providing merit-based bonuses. Bonuses shall be allocated as follows:

*The total available funding allocated is \$208,000.*

# **New Hanover County Schools**

## **Merit Pay Plan for Non-Educators**

### **Introduction**

The State Board approved allocations to each locality to pay non-educators a merit based bonus. Section 36A1 of SL2016-94 requires each LEA to have an approved plan that determines the distribution of the bonuses based on criteria establishing merit. The New Hanover County Board of Education encourages the recognition of excellent performance and achievement through the use of merit pay and other such awards. Reward and recognition for employee excellence is a vital part of the school system's compensation program.

The Merit Pay Plan for Non-Educators will meet all of the state requirements and award the 30% highest performing non-educator employees within each school or department a bonus regardless if the employee is state or locally paid.

The purpose of this Plan is to implement a fair and consistent process for recognizing and rewarding non-educator employees for their performance and achievements. The Plan reflects the following principles:

1. Performance recognition is aligned with the school system's Strategic Plan and state and local employee evaluation processes.
2. The Plan is consistent with state and local student and employee achievement goals.
3. The Plan is practical and timely.
4. The Plan is credible, objective and transparent.
5. The Plan meets all state and local requirements.

### **Eligibility for Merit Pay**

Non-educators are eligible for merit pay if:

1. They were employed by New Hanover County Schools by September 1, 2015, and have remained in continuous employment since that date.
2. They worked a minimum of 20 hours per week.
3. They received a completed and signed evaluation for the 2015/16 school year. Non-educators are not eligible for this bonus if they were on an approved leave of absence for such a length of time during the year their supervisor was unable to complete a comprehensive evaluation of their performance.
4. They were rated "At or Above Standard" on all areas on last year's evaluation.
5. They have not received a "Letter of Concern" or similar type of communication since September 1, 2015.
6. They have not been placed on any type of Improvement Plan since September 1, 2015.
7. They do not hold supervisory positions and are not paid on the supervisory pay scale.

### **Bonus Criteria**

If non-educators within an individual department or school meet eligibility requirements as listed above, their overall ranking within their department or school will be established by comparative scoring on a rubric measuring the specific skill sets required for success within the individual department or school. The rubric will measure:

- a) Evaluation data from the 2015/2016 school year.
- b) Demonstrated leadership within school, department, or system.

# New Hanover County Schools

## Merit Pay Plan for Non-Educators

- c) Nomination or recognition of high performance or actions which are beyond what is required for an employee’s position.
- d) Attitude as demonstrated through self-control and a supportive and positive professional demeanor.
- e) Job-based additional training, professional development, or certification beyond what is required for an employee’s position.
- f) Other criteria consistent with requirements developed for that particular department or school.

The top 30% will be chosen from the total number of employees within that department or school to receive the bonus.

Each individual department or school will be identified for participation in the bonus plan, along with all of the employees in their department or school who are eligible to participate. Each identified department or school’s supervisor will review and score each eligible employee using the rubric and will rank them from highest to lowest with the top 30% of the total number of employees in the identified department receiving the bonus. In the event of a tie at the 30% level, the bonus will be awarded to the individual with the longest service to New Hanover County Schools.

The bonus amount will be determined after all of the employees chosen to earn the bonus have been identified and will be prorated between full time (over 30 hours) and part time (under 30 and over 20 hours).

<b>Merit-Based Pay Bonus Rubric</b>						
<b>Employee</b>	<b>Evaluations (More Above Standards than At Standard)</b>	<b>Leadership (Able to problem solve and motivate others)</b>	<b>Initiative (Recognizes and steps up to take on tasks)</b>	<b>Attitude (Displays self- control and positivity)</b>	<b>Drive (Willing to learn new things or get new credentials)</b>	<b>Total</b>
	1 2 3	1 2 3	1 2 3	1 2 3	1 2 3	
	1 2 3	1 2 3	1 2 3	1 2 3	1 2 3	
	1 2 3	1 2 3	1 2 3	1 2 3	1 2 3	
	1 2 3	1 2 3	1 2 3	1 2 3	1 2 3	
	1 2 3	1 2 3	1 2 3	1 2 3	1 2 3	
	1 2 3	1 2 3	1 2 3	1 2 3	1 2 3	
	1 2 3	1 2 3	1 2 3	1 2 3	1 2 3	

**RECOMMENDED OPTION**  
from  
**Possible Five (5) Options for Merit-Based Pay**  
**Northampton County Schools**

Initial Draft - Rumley – 10-7-16  
REVISED BY GROUP REVIEW ON 10-13-16 (Woofter, Rumley, Miller, Gillus)

**PLAN TO STATE: Due in mid-December**  
**BOARD ACTIONS: Proposed to Facilities/Finance Committee Mtg (10/19/2016)**  
**Proposed to BOE Policy Committee (Oct. 27, 2016)**

**RECOMMEND TO BOE FOR ACTION – November 14, 2016**

**PAY MERIT PAY BONUS PAYMENTS - In January Paycheck (15<sup>th</sup> or 31<sup>st</sup>)**

**Option 3: Identify Employee Types who are not yet paid at 100% of the state scale. Award merit pay to these employee types ONLY who do NOT demonstrate performance concerns.**

**Conditions: For Maintenance, School-Based Clerical Staff; Central Office Clerical Staff; Bus Garage Clerical Staff Member; Teacher Assistants, and Custodians.**

Must have been employed on or before 8/18/2016 with NO performance concerns as attested to by respective supervisors (attestation of performance statement required).

**Impacts:** Though this is a one-time bonus, this option makes an effort to equalize the percentage of state-based pay (scales) between classifications of employee types. Some classified employee types across the district are already paid at 100% of the state-scales (school food service, bus garage employees, bus drivers, which was accomplished in 2015); others are not. Those employee types who are not paid at 100% of the state scale are therefore initially eligible to receive this one-time bonus payment. This option impacts the local budget (minimally) for any locally-paid employees as well as any employees in the categories above who are paid from federal funds.

**Benefits:** Validates those selected employees in 16-17 who have not yet been placed on a 100% pay scale (state's minimum – maximum). This option is Performance-Based, and therefore, qualifies as a "merit pay" plan. Most eligible employees under this option are paid from state budgets – has only a minimal impact upon federal and local budgets.

**Limiting Criteria for Final Qualification to Receive Bonus:** Any employee in the eligible categories stated above must have NO performance concerns within the past one (1) year.

Each person's immediate supervisor/s must attest to no performance concerns; a form for this verification is attached to this description. In this way, a truer determination of "merit-based" award is being made/determined so that no "across-the-board" bonus is accomplished, in accordance with State requirements for this particular bonus.

**Note: The Finance/Facilities Committee, a standing committee of the NCS Board of Education, reviewed this plan on October 19, 2016 and endorsed it as the preferred option among five (5) developed/possible options. Likewise, the BOE Policy Committee concurred that administration's choice among five options was acceptable.**

**Administration recommends this option to the NCS Board of Education as an action item during its regularly scheduled November 14, 2016 meeting.**

**APPROVED BY NCS BOE on 11-14-16**

---

**Approximate # of Initially Eligible Employees, before Performance Attestation statements are completed: n=60**

**Total allocated to NCS from State Funds for Bonus Payments, less FICA deduction: approx. \$ 47,000**

**Approximate amount of Bonus Payment per Employee: \$ 783.33**

**Additional Note: The final pool of eligible employees will be determined following a thorough review of the Performance Attestation statements. It is POSSIBLE that some employees may not be eligible, given performance concerns. Thus, the amount of bonus payment to each final eligible person may be greater than \$783.33.**

**One-Time Merit Pay Bonus for Selected Classified Employees  
Supervisor's Performance Attestation**

In accordance with criteria set forth in a local plan to compensate selected Northampton County Schools' classified employees, supervisors of these employees must attest to each eligible person's work performance by checking one of the boxes below. Where/If applicable, a narrative explanation must accompany the attestation, especially if performance concerns are noted.

Supervisor's Name(s) \_\_\_\_\_

The initially eligible employee below must be rated by the supervisor. Check the column/box that applies to the named employee with regard to his/her work performance. IF there are employment concerns, there MUST be a narrative explanation provided to include the nature of the concern, for how long the concern has existed, and whether or not such employee is on an action plan or other type of improvement effort. Additionally, the supervisor must explain HOW the performance concern has been documented (action plan, letter in district personnel file, notes from conference(s), etc.

Eligible Employee	Performance Proficient or Above Proficient	Performance Concern(s) Exist in 16-17

Narrative Comments to Support Rating Above:  
(REQUIRED if "Performance Concerns" are checked in last box. Use reverse side if additional space is needed for comments.)

---



---



---



---



---



---



---



---

Supervisor's Signature(s) \_\_\_\_\_ Date \_\_\_\_\_

\_\_\_\_\_ Date \_\_\_\_\_

# Onslow County Schools

## 2016-17 State Legislated Merit Based Bonus

---

### **Eligibility:**

1. Must be a non-educator as restricted by the Merit Based Bonus legislation included in NC Session Law 2016-94. Non-educator is defined as employees other than teachers and instructional support personnel paid on the teacher salary schedule.
2. Must be employed with Onslow County Schools on September 1, 2015 and have remained continuously employed with Onslow County Schools through January 1, 2017 as a permanent employee in leave earning status or a bus driver, bus monitor, cafeteria assistant, or child care worker with a daily work assignment.
3. Must have satisfactory job performance that meets or exceeds expectations as evidenced by the absence of a documented letter of reprimand filed between September 1, 2015 and January 1, 2017.

### **Payment Frequency and Amount:**

- The one-time merit based bonus payment will be paid on January 31, 2017.
- For each 100% employed eligible OCS employee, the payment will be \$400.
- For each less than 100% employed eligible OCS employee, the payment will be as follows:
  - \$400 for those with an employment percentage over 75%
  - \$300 for those with an employment percentage over 50% through 75%
  - \$200 for those with an employment percentage of 50%
- For each eligible bus driver, bus monitor, cafeteria assistant, and child care worker with a daily work assignment who is employed less than 50%, the payment will be \$200.

### **Special Conditions:**

- Employees on paid leave will receive payment if eligibility requirements are met.
- Teachers/Instructional Support Personnel paid from the State certified pay schedules for teachers/instructional support/psychologists are not eligible for this bonus.
- Other types of employment arrangements, including those who only work on an intermittent or substitute basis, are not eligible for this bonus.
- This one-time merit based bonus is not subject to retirement contribution.





Board of Education  
Pamela E. Thomas, Chairman ▪ Brock Ridge, Vice Chairman  
Joel Churchwell ▪ Jonathan Merritt ▪ Earl Taylor ▪ Paul Wiggins ▪ Bob Williams

ONSLOW  
COUNTY  
SCHOOLS



Superintendent  
Rick Stout

---

To: Nicola Lefler, NCDPI

From: Barry Collins, Associate Superintendent

Date: December 9, 2016

RE: Merit Based Bonus

On December 9, 2016 the Onslow County Board of Education met in a special called meeting to discuss the merit based bonus. The Onslow County Schools approved Merit Based Bonus Plan for 2016-17 is attached. It is the intent of our school district to continue to make adjustments to the plan moving forward, assuming continued funding. The adjustments would emphasize more significant weight given to documented performance ratings as noted on the classified employee evaluation form.

## **Orange County Schools**

### **Merit Pay Plan for Non-Educators**

**November 14, 2016**

The General Assembly's Appropriations Act (House Bill 1030) contained a provision for merit pay for "non-educators" (see Appendix A). Orange County Schools' allocation is \$86,292, provided to only fund merit pay for state-paid "non-educators." A significant stipulation of the funding is that it cannot be "across the board."

Thus, Orange County Schools proposed plan has been developed around the conditions below:

1. Merit pay will only be paid to employees who earn less than \$30,000 in base pay (not including local supplement or other differential).
2. In compliance with House Bill 1030, merit pay will only be paid to employees who are "non-educators" not paid on the teacher salary schedule. "Teachers" includes teachers, school counselors, school social workers, psychologists and nurses paid on the teacher salary schedule.
3. Merit pay will be paid only to full time employees.
4. Merit pay will only be paid to employees who have worked for Orange County Schools continuously since August 25, 2015; and were in attendance at work at least one day during this time period.
5. An employee who received any "Needs Improvement", "Unsatisfactory", or other below standard rating on his/her Summative Evaluation for 2015-2016 will not be eligible to receive the merit pay award. Merit pay will be distributed with the January 13, 2017 payroll, which covers the time period December 19 through December 30, 2016. Merit pay will only be paid to employees who are employed as of December 30, 2016.
6. The amount of the merit pay will be based on the full expenditure of the allotted merit pay funds from state, divided by the number of eligible state-paid employees, with an equivalent amount awarded to eligible employees paid with local or federal funds. While the language in the General Assembly bill indicates that merit pay will only go to "state paid" employees, Orange County Schools will appropriate fund balance from its General Fund to also fund eligible employees paid from other sources. While the language in the General Assembly bill indicates that merit pay will only go to "state paid" employees, Orange County Schools will appropriate fund balance from its General Fund to also fund eligible employees paid from other sources.

## Appendix A

### **STATE-FUNDED PERSONNEL/MERIT-BASED BONUSES AUTHORIZED**

**SECTION 36.1A.(a)** Funds for Merit-Based Bonuses. – Of the funds appropriated in this act from the General Fund and Highway Fund to the Compensation Bonus Reserves, nonrecurring funds for the 2016-2017 fiscal year are authorized generally to provide employing agencies with funds to award one-time merit-based bonuses to State-funded personnel in accordance with eligibility policies adopted by the employing agencies. The eligibility policy shall not provide an across-the-board bonus for this purpose. Notwithstanding G.S. 135-1(7a) and G.S. 135-53(5), merit-based bonuses awarded under this Part are not compensation under Chapter 135 of the General Statutes.

**SECTION 36.1A.(b)** Employing Agency. – For the purposes of this Part, "employing agency" includes the following entities employing State-funded personnel:

- (1) The State Human Resources Commission, for executive branch departments with respect to both EHRA and SHRA employees, except University of North Carolina EHRA employees.
- (2) The Administrative Office of the Courts and the Commission on Indigent Defense Services, for the judicial branch.
- (3) The Legislative Services Commission, for the legislative branch.
- (4) The Board of Governors of The University of North Carolina, except as to its SHRA employees.
- (5) The State Board of Community Colleges, for the North Carolina Community College System.
- (6) Each local board of education, for school-based administrators, central office, and noncertified personnel. Educators are not eligible.

**SECTION 36.1A.(c)** Reporting. – Each local board of education shall provide to the Department of Public Instruction (DPI) the details of how these funds are distributed by House Bill 1030  
Session Law 2016-94 Page 171

## **Chapel Hill-Carrboro City Schools Merit Pay Plan**

- **Eligibility:** Classified employees are eligible. Eligible employees must have been employed on or before January 1, 2016 and be employed by the district on the payment date. Employees will not be eligible if they are on an action or improvement plan or have received a written letter identifying performance concerns and/or disciplinary concerns on or after January 1, 2016. By statute, “educators” who are paid on the teacher salary schedule are not eligible for this bonus. For purposes of this plan, “educators” include teachers, school counselors, school social workers, psychologists, nurses, and any other employees paid on the state teacher salary schedule.
- **Amount to award:** \$450.00 (prorated for part-time personnel)
- **Payment date:** November 30, 2016
- **Special Conditions:**
  - Employees on a leave of absence are eligible if they return to active status in the 2016-17 school year. Employees currently on a leave of absence, that have not had a 2015-16 performance evaluation, must receive an evaluation upon return in 2016-17 to be eligible to receive the bonus in 2016-17.
  - Employees who separate from employment with the district, prior to the issuance of the merit pay bonus on November 30, 2016, will not receive the bonus.
  - Employees who have transferred within the district (lateral, demotion, reassignment, or promotion) are eligible to receive the merit pay bonus if all other criteria are met.

**Merit-Based Bonus Plan for Non-Educators  
Pamlico County Schools**

The Pamlico County Board of Education will award one-time merit-based bonuses to eligible employees in March, 2017 in accordance with this local plan and NC Session Law 2016-94, section 36.A1. The allocation of these one-time bonuses will not be across-the-board, and the amount of bonus awarded will not be added to the employee's base salary and will not be considered compensation for retirement purposes.

To be eligible for the one-time merit-based bonus, an employee must meet the requirements set forth below.

**1. Position Requirements:**

- a. Employees that are permanent full-time and permanent part-time are eligible. This includes 10, 11 and 12 month employees. Employees must be a state-funded school based administrator, central office employee or non-certified employee.
- b. Funds are not provided by the state for locally paid employees. All locally paid employees in similar positions will be paid from local funds. Teachers and instructional support personnel who are paid on the teacher salary schedule are not eligible for the merit-based bonus.
- c. Eligible employees must have a hire date prior to July 1, 2016, and must be in active pay status at the time that the merit-based bonuses are distributed.
- d. New employees hired on July 1, 2016 or later are not eligible for the merit-based bonus.
- e. Employees that have a discipline/reprimand letter in their file from the 2015-'16 school year or the 2016-'17 school year (up to when bonuses are paid), will not be eligible for the bonus.
- e. For part-time employees their merit-based bonus will be pro-rated based on their percentage of employment.

**2. Calculation of Points for Eligible Employees**

<i>Calculation for School Based Administrators</i>			
Category	3 points	2 points	1 point
Attendance - days absent in 2015-'16 *	0-4 days	5-7 days	8-10 days
Number of years in the NC Retirement System	20+ years	10-19 years	0-9 years
2015-'16 Summative Evaluation Rating	Distinguished	Accomplished	Proficient
Degree	Doctorate	Masters	Bachelors

<i>Calculation for Central Office Administrators, Directors and Coordinators</i>			
Category	3 points	2 points	1 point
Attendance - days absent in 2015-'16 *	0-4 days	5-7 days	8-10 days
Number of years in the NC Retirement System	20+ years	10-19 years	0-9 years
2015-'16 Summative Evaluation Rating	Above Standard	At Standard	
Degree	Masters	Bachelors	Associates

**Merit-Based Bonus Pay for Non-Educators  
Pamlico County Schools**

<i>Calculation for Clerical/Maintenance/Teacher Assts./Technology/Transportation</i>			
Category	3 points	2 points	1 point
Attendance - days absent in 2015-'16 *	0-4 days	5-7 days	8-10 days
Number of years in the NC Retirement System	20+ years	10-19 years	0-9 years
2015-'16 Summative Evaluation Rating	Superior / Above Standard	At Standard	
Degree	Bachelors	Associates	Certificate

<i>Calculation for Custodians</i>			
Category	3 points	2 points	1 point
Attendance - days absent in 2015-'16 *	0-4 days	5-7 days	8-10 days
Number of years in the NC Retirement System	20+ years	10-19 years	0-9 years
2015-'16 Summative Evaluation Rating	Above Standard	At Standard	
Emarb Rating Score	8-10 points	5-7 points	3-4 points

Attendance - days absent in 2015-'16 \* - When calculating the number of days absent, only include annual leave, sick leave and leave without pay. If these type of leave days were taken during Christmas break, Spring break and Inclement weather days that were optional workdays, they are not to be included in the "days absent" calculation.

### **3. Calculation of Bonuses**

All eligible employees may earn from 1 to 12 points. Once it is determined how many points each employee earns, then all of the points will be added together so that a "dollar value per point" can be determined. For example: If a grand total of 850 points are earned, then the allotment of \$29,126 is divided by 850, which equals \$34.27 per point. An employee who earns 12 points would receive \$411.24 (12 points x's \$34.27), an employee who earns 9 points would receive \$308.43, and if an employee only receives 1 point they would receive \$34.27.

# Elizabeth City-Pasquotank Merit Based Bonus Proposal

## Merit Pay Bonus Allocation for Non Educators

### Legislation

The 2016 General Assembly ratified on July 14, 2016, HB 1030 (Session Law 2016-194), which provides funding for a one-time merit bonus. The State Board of Education approved the allocation method for the merit based bonus appropriated in Session Law 2016-94 Section 36.1A. Elizabeth City-Pasquotank Schools has received an allocation of **\$85,789.00** for the fiscal year 2016-2017.

Each LEA must create and submit a locally approved plan that determines how the merit bonus will be distributed. Legislation requires that the bonuses shall: **(1)** Be distributed based on a locally approved plan **(2)** Not be distributed across the board **(3)** Not be paid to certified teachers or instructional support and **(4)** Be paid to state funded personnel only.

Further, the bonus is not subject to retirement and is a one-time payment (non recurring).

### Proposal

Bonuses may be awarded to school administrators, central office, teacher assistants, clerical staff, auxiliary services (maintenance, transportations, child nutrition, grounds), and all non-certified staff. While ECPPS<sup>1</sup> believes that every employee plays a vital role in the overall function and efficiency of our school system, as written in legislation, there cannot be an across the board distribution of Merit Pay Bonus funds. A committee of employees comprised of representatives from each eligible classification met and recommended all eligible personnel be awarded the bonus based on a criterion based rubric. In addition, a special condition to receive the Merit Bonus is employees must have been employed during the 2015-2016<sup>2</sup> school year and continue to be employed with ECPPS during the 2016-2017 school year.

Employees identified to receive the Merit Bonus Pay, shall receive a share of the bonus in proportion to the points earned based on the following rubric criteria:

Criteria	0	2	4	Points
Longevity <sup>3</sup>	Employed with ECPPS 1 year or less	Employed with ECPSS 2-9 years	Employed with ECPPS 10 or more years	
Performance	Rated: "Not Demonstrated" "Developing" "Needs Improvement" "Unsatisfactory" "Numerical rating 1"	Rated: "Proficient" "Accomplished" "Meets" "Exceeds" "Satisfactory" "Numerical rating 2, 3"	Rated: "Distinguished" "Superior" "Excels" "Numerical rating 4"	
Reprimands	None	None	No letters of reprimand in personnel file during the 2015-2016 school year	
Attendance <sup>4</sup>	Absent more than 5 days or more during the 2015-2016 school year	Absent 5 days or less during the 2015-2016 school year	No absences during the 2015-2016 school year	
School Growth	Base school <u>did not meet</u> growth during the 2015-2016 school year	Base school/non-school based employees <u>met</u> growth during the 2015-2016 school year	Base school <u>exceeded</u> growth during the 2015-2016 school year	
<b>Total</b>				
Merit Bonus Award	1-9 points No Award	10-14 points *\$000.00	15-20 points *\$000.00	

\*Award amounts will be determined once the number of individuals receiving the award is established.



## **Proposed Timeline of Distribution**

September 2016- Committee determines eligible positions

October 2016- Human resources identifies eligible employees and distribute rubric to immediate supervisors.

Presentation to the Board of Education for review, discussion and acceptance of Merit Pay Bonus Allocation plan

Immediate supervisors return completed and signed recommendations to the Superintendent for final review. Recommendations will then be forward to the finance department.

December 2016- Distribution of Merit Pay Bonus in the December check.

## **Notes**

<sup>1</sup>Elizabeth City-Pasquotank County Public Schools

<sup>2</sup>2015-2016 school year is defined as the first and last student day.

<sup>3</sup>Years of employment do not have to be consecutive.

<sup>4</sup>Annual vacation days (i.e. Christmas, etc.) do not count towards employee absences.

## Pender Merit Pay Bonus Allocation for Non-Educators

The Board will award one-time merit-based bonuses to eligible employees in December 2016 pursuant to North Carolina Session Law 2016-94, section 36.1A and in accordance with the plan outlined herein. To comply with law, the allocation of these one-time bonuses will not be across-the-board. The amount of bonus awarded will not be added to the employee's ongoing base salary and will not be considered compensation for retirement purposes.

### A. Eligibility

To be eligible for a one-time merit-based bonus, an employee must meet the requirements established below.

#### 1. Position Requirements

- Employed in a permanent (full-time/part-time), probationary, or time-limited appointments,
- Not paid on the teacher salary schedule (maintenance staff, teacher assistants, bus drivers, clerical staff and school administrators)
- Employed on or before September 1, 2015 with no break in service
- Employed on the last day of the pay period in which payment is disbursed

#### 2. Performance Requirements

- No formal or informal disciplinary action as of September 1, 2015 through the present
- Overall performance evaluation ratings of "meets", "at standard", "proficient" or higher on 2015-16 evaluation.

#### 3. Listing of Ineligible Positions

- Leadership Team\*
- Educators\*\*
- Any staff paid on teacher salary scale including coordinators

### B. Amount of Bonus

The superintendent shall ensure that the total amount of funds awarded do not exceed the amount of funds provided by the state for the purpose of providing merit-based bonuses. Bonuses shall be allocated as follows:

School-Based Administrators (Principals & Assistant Principals) – up to \$600 maximum, based on criteria below:

- School Performance Grade of 'C' or above - \$200
- Exceeding School Growth - \$200
- Increased School Performance Grade at least one level and/or moved out of Low-Performing status and/or maintained highest level of combined school performance - \$200

Maintenance staff, teacher assistants, bus drivers, clerical and technology staff – up to \$300 maximum based on criteria below:

- Had an acceptable attendance record as verified by immediate supervisor during the 2015-2016 school year (i.e., no more than 5 absences unless determined otherwise by the immediate supervisor such as holidays, approved leave, sick leave that has accompanying doctor note, comp time, etc.) - \$100
- Overall performance evaluation ratings of 'At' or 'Above Standard' - \$100
- Acquired degree (Associates, Bachelors, Masters, etc.) and/or certification related to job area - \$100

Directors, Assistant Directors, Coordinators not paid on Teacher Salary Scale and not on Leadership Team – up to \$300 maximum based on criteria below:

- Overall performance evaluation ratings of ‘At’ or ‘Above Standard’ - \$150
- No formal or informal disciplinary action as of September 1, 2015 through the present - \$150

### **C. Suggested Timeline**

December 2016 – Presentation of revision to Board of Education for review, discussion and possible approval of Merit Pay Bonus Allocation plan.

Distribute the list of eligible employees to the immediate supervisors for their review and final recommendations.

December 2016 – Immediate supervisors return completed and signed recommendations to the Superintendent for final review who will in turn forward to the finance department.

February 2017 – Distribution of Merit Pay Bonus in the February check.

Note: Timeline adjusts by one month based on the approval date by the Board

\* Leadership Team includes the Superintendent, Chief Finance Officer, Chief Officer for Human Resources, Chief Officer for Auxiliary Services, Chief Officer for Organizational Development, Lead Director for Instructional Services and Community Schools Director.

\*\* According to North Carolina Session Law 2016-94, section 36.1A, educators (certified teachers and instructional support) are not eligible for this one-time Merit Bonus.

# Perquimans County Merit Based Bonus Proposal

## Merit Pay Bonus Allocation for Non Educators

### **Background:**

The State Board of Education approved the allocation method for the merit based bonus appropriated in SL 2016-94 Section 36.A1. The Perquimans County School System has received an allocation of \$35,147.00 for fiscal year 2016-17.

Each LEA must now have a locally approved plan that determines the distribution. The bonuses shall:

- Be distributed based on a locally approved plan
- Not be distributed across the board
- Not be paid to certified teacher or instructional support
- Be paid to state funded personnel only

Based on the total amount allocated by the state, the total amount available to each individual if they were to receive their full share would be approximately \$594.00. It is now the task of the Perquimans County Board of Education to develop and approve the plan for distribution.

### **Proposal:**

The Perquimans County Board of Education believes that every employee plays a valuable role in the overall function and service of the educational system. As such, and knowing the stipulation that there cannot be an across the board distribution of Merit Pay Bonus funds, the Board proposes the funds be distributed to the following groups using the following guidelines.

- The employee must be a current full-time employee, in good standing with the Perquimans County School District, who was serving within one of the identified sub-groups during the 2015-2016 school year.

### **Subgroup to receive the Merit Pay Bonus:**

Position	Number of Employees
Assistant Principals	3
Custodians	17
Transporters	27
Bookkeepers	3
Data Managers	4
HS. Office Manager	1
Total	55

\*To meet the requirements of the Merit Pay not being an “across the board payment”, Directors, Principals, Central Office Staff and School Nutrition will not be included within this formula.\*

**Suggested Timeline:**

October 2016 – Presentation to Board of Education for review, discussion and possible acceptance of Merit Pay Bonus Allocation plan.

November 2016 – Distribution of Merit Pay Bonus in the November check.

**MERIT-BASED BONUSES  
PERSON COUNTY SCHOOLS**

**LEA: 730**

**NOVEMBER 21, 2016 -- APPROVED BY BOARD OF EDUCATION (5-0)**

---

The board will award one-time merit-based bonuses to eligible employees in December, 2016 in accordance with the plan outlined here and North Carolina Session Law 2016-94, section 36.1A. To be consistent with law, the allocation of these one-time bonuses will not be across-the-board. The amount of bonus awarded will not be added to the employee's ongoing base salary and will not be considered compensation for retirement purposes.

**A. ELIGIBILITY**

To be eligible for a one-time merit-based bonus, an employee must meet the requirements established below.

**1. Position Requirements**

Employees eligible must have been employed in the Person County Schools during the 2015-2016 school year and still employed at the time of the disbursement of the merit bonus in December 2016. The merit pay does not apply to any employees newly hired for the 2016-2017 school year. Eligible employees with an active disciplinary action will not be eligible.

Employees with permanent (full-time/part-time) appointments and who work a 10, 11, or 12-month schedule and meet legislative criteria and eligibility components are those who will be considered for the bonus.

Bonuses for part-time employees will be paid on a pro rata amount according to the percentage of their employment.

The assigned funding source for each eligible employee will be utilized for the payment of the merit bonus. Funding sources other than State may be distributed at a lesser amount based on the availability in the specific funding source from which one is paid.

Employees eligible are classified employees and include the following:

- Teacher Assistants
- Office Support/Clerical
- Bus Drivers
- School Nutrition
- Maintenance
- Custodial

## 2. Eligibility/Performance Requirements and Amounts

Criteria utilized for selection of those eligible for a merit bonus are as follows.

- Longevity of 20 years or more with the Person County Schools
  - **\$500.00 to \$600.00** *(amount varies depending on funding source)*
- Longevity of 10-19 years with the Person County Schools
  - **\$250.00 to \$300.00** *(amount varies depending on funding source)*
- Perfect Attendance during the 2015-2016 work year
  - **\$250 to \$300.00** *(amount varies depending on funding source)*
- Bus Drivers with Perfect Attendance in driving established routes during the 2015-2016 school year
  - **\$500.00**
- Bus Drivers who missed five or less routes during the 2015-2016 school year
  - **\$250.00**
- Perfect Evaluations of Above Standard and/or higher based on the evaluation instrument during the 2015-2016 school year
  - **\$300.00 to \$400.00** *(amount varies depending on funding source)*
- Eligible Employees who went Above and Beyond their scope of duties/responsibilities as identified and justified by Principals and Directors
  - **\$500.00 - \$600.00** *(amount varies depending on funding source)*

The overall amount any eligible employee could receive ranges between \$250.00 and \$2,400.00. (This is based on the number of qualifiers met and the funding source.)

Any potential eligible employees as identified in A1 who have possibly received an adjustment in their salary other than the State raise, are ineligible for this merit bonus.

The following is an example of how the identification of eligible employees was completed.

First Name	Last Name	Site Loc	Fund	Longevity 20+ in PCS \$600	Longevity 10-19 in PCS \$300	Above and Beyond \$600	Perfect Att 15-16 \$300	Bus Perf. Att 15-16 \$500	Bus Less than 5 15-16 \$250	Perfect Eval 15-16 \$400
A	B	324	Head Start		X	X			X	
C	D	354	Local		X					
E	F	354	State		X					
G	H	368	SN	X			X	X		X
I	J	402	Federal	X			X			



---

---

### 3. Other Pertinent Information

Information was solicited from the following in order to determine the final grouping of employees who would be eligible for the merit bonus.

- Principals
- Assistant Principals
- Site Directors
- Central Office Leadership
- Auxiliary Directors
- Committee (Superintendent, Two Board Members, Director of HR, and Finance Officer)

#### Process Timeline

- Information Provided to LEAs – July 2016
- Survey of Principals, Asst. Principals, Central Leadership – August 2016
- Further guidance received from state – Mid September 2016
- Data Collections – Mid September 2016
- Further Discussion – LTM September 30, 2016
- Committee Meeting – October 19, 2016
- Plan presented to Full Board – November 21, 2016
- Board Action Requested – November 21, 2016
- Information due to Finance – November 30, 2016
- Pay date for Merit Bonus – December 2016

### B. AMOUNT OF BONUS

The superintendent shall ensure that the total amount of funds awarded do not exceed the amount of funds provided by the state for the purpose of providing merit-based bonuses. Bonuses shall be allocated as follows:

Per the plan established to award the Merit Bonus, the following funding sources and amounts will be distributed:

<b>State:</b>	\$56,911.00 (Amount provided for State Paid Employees)
<b>Local:</b>	\$15,932.20
<b>School Nutrition:</b>	\$11,680.03
<b>Early Intervention:</b>	\$968.85
<b>Head Start:</b>	\$2,583.60
<b>Federal:</b>	\$968.85

Note: All amounts listed above include the .0765 in the totals.

**Pitt County Public Schools  
Merit-Based Bonus Proposal:**

Pitt County Schools will pay qualifying employees (non-educators) a one-time, merit-based bonus as follows:

Principals, Assistant Principals and Teacher Assistants will be considered based on student achievement for the 2015-16 school year, as follows:

	<b>Exceeded Growth</b>	<b>Met growth (+1 standard Deviation)</b>	<b>Met growth (-1 standard Deviation)</b>	<b>Did not Meet Growth</b>
<b>Principals</b>	\$ 850.00	\$ 750.00	\$ 650.00	\$ -
<b>Asst Principals</b>	\$ 750.00	\$ 650.00	\$ 550.00	\$ -
<b>TA's</b>	\$ 450.00	\$ 400.00	\$ 350.00	\$ 300.00

Custodial Staff will be considered based on school cleanliness scores for the 2015-16 school year, as follows:

	<b>School Cleanliness Scores</b>			
	<b>A</b>	<b>B</b>	<b>C</b>	<b>D</b>
<b>Custodians</b>	\$ 400.00	\$ 350.00	\$ 300.00	\$ 250.00

Transportation employees will be considered as follows:

	<b>Mechanic III</b>	<b>Mechanic II</b>	<b>Mechanic I</b>
<b>Bus Garage</b>	\$ 650.00	\$ 550.00	\$ 450.00

Occupational therapists and occupational therapist assistants will be considered as follows:

<b>Occupational Therapists</b>	\$ 450.00
<b>Occupational Therapist Assistants</b>	\$ 350.00

Other staff will be considered as follows:

	<b>10+ years</b>	<b>5-9 years</b>	<b>0-4 years</b>
<b>Clerical / Maintenance</b>	\$ 300.00	\$ 250.00	\$ 200.00
<b>Bus / Bus Monitors / SSEC</b>	\$ 300.00	\$ 250.00	\$ 200.00
<b>Child Nutrition</b>	\$ 200.00	\$ 175.00	\$ 150.00

**Payment Date:**

Eligible employees shall receive payment of the Pitt County Schools Merit-Based Bonus along with their regularly issued paycheck in the month of December 2016.

**Evaluation:**

Supervisors must determine that employees have not received any rating of unsatisfactory on their most recent evaluation in order to be eligible for the bonus.

**Special Conditions:**

Employee must have been in the eligible position from January 4, 2016 through October 31, 2016. Employees who leave or arrive at any time therein are not eligible for the Merit-Based Bonus.

Employees working less than 4 hours per day are not eligible for payment.

Eligibility is based on primary assignment, the job in which the employee works the largest number of hours.

Pro-ration may occur for staff employed less than 100% and those in dual positions (i.e. custodian / bus driver).

Leave of Absence – Employees on leave of absence may be eligible upon return to work.

Teachers and other instructional support positions paid on the NC Public Schools Salary Schedule are not eligible for the one-time merit pay.

# Merit-Based Bonus Plan

## Polk County Schools

### I. Background

Ratified by the 2016 North Carolina General Assembly and signed into law by Governor Pat McCrory, House Bill 1030 (Session law 2016-194) includes a provision for the distribution of a one-time merit-based bonus for eligible employees in a state funded position. Polk County Schools received a merit-based bonus allocation of \$ 34,895. The legislation outlined the following requirements:

- Each Local Education Agency (LEA) must develop and approve a plan for awarding the bonuses
- The bonuses may not be distributed “across the board” and must be based on performance levels or established criteria
- Teachers or those paid on the related Teacher Salary Schedule are not eligible to receive the bonus
- To receive the bonus an employee must have been hired on or before January 1, 2016 and may not have had any “break in service”
- Any employees with “active” disciplinary action are not eligible

### II. Proposal

The Polk County Board of Education believes every employee plays an important and valuable role in the education of students. All staff members working each day and giving their best effort to provide needed services and an exceptional learning environment for young people are worthy of recognition and appreciation. Due to the legislative restrictions and the denial of any “across the board” distribution, a special committee including representation from eligible employee groups and the Board of Education was established to arrive at recommendations for awarding the merit-based bonuses. After discussion and receiving input, the committee offers this proposal for approval.

# Merit-Based Bonus Plan

## Polk County Schools

*Employees who meet the following criteria will be granted a merit bonus (amount dependent on number of employees included / eligible):*


- Employee is currently working for twenty hours or more per week in a *Teacher Assistant, Custodian, or Clerical* position
- Employee was hired on or before January 1, 2016 with no break in service from that date to the time bonuses are awarded
- Employee has no “active” disciplinary or directed improvement plans
- Employee has not received “below standard” on any evaluations
- Employee is assigned to a school that “met” or “exceeded” growth for 2015-2016

### III. Review, Verification, and Payment

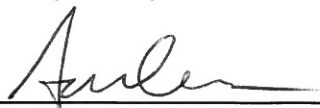
The Superintendent will submit the names of all eligible employees to each immediate supervisor for verification by April 10, 2017. Supervisors will review their lists and return the completed verification to the Superintendent by May 8, 2017. The Superintendent will approve the final lists and submit to the Finance Officer. Eligible employees will receive their bonuses on the May 2017 pay date.

This Merit-Based Bonus Plan was approved by the Polk County Board of Education on December 12, 2016.

Board Chair: Geoffrey Tennant

Signed:  Date: 12/12/16

Board Secretary / Superintendent: Aaron Greene

Signed:  Date: 12/12/2016

# Randolph County Merit Based Bonus Proposal

# Merit-Based Bonus Plan for Principals & Assistant Principals (2016-2017 School Year)

1. The following two (2) position types will be included in this bonus plan: Principal and Assistant Principal. The attached diagrams define the weighting of the evaluation criteria for each position type.
  
2. Explanations of action needed to satisfy the bonus plan criteria:
  - A) School Performance = The school's "performance composite" increased for the 2016-2017 school year in comparison to the 2015-2016 school year.
  
  - B) Student Attendance = The school's "attendance percentage" increased for the 2016-2017 school year in comparison to the 2015-2016 school year.
  
  - C) Evaluation Growth = The principal or assistant principal achieves an average of at least a "Level 2" rating for Standards 1-7 included in his/her year-end evaluation. The "Level 2" rating coincides with the following per position type:  
Accomplished (Principal) and Accomplished (Assistant Principal).
  
  - Note: A staff member will not satisfy this requirement if a single rating on Standards 1-7 on his/her year-end evaluation is less than "proficient."
  
  - Note: When computing the average rating, the rounding of results will not be permitted.

3. Bonus structure per position type:

Principal	\$3000
Assistant Principal	\$2100

(Note: These figures represent the total bonus amount that an employee can earn if he/she satisfies all three components of the plan.)

### **Special Notes/Issues:**

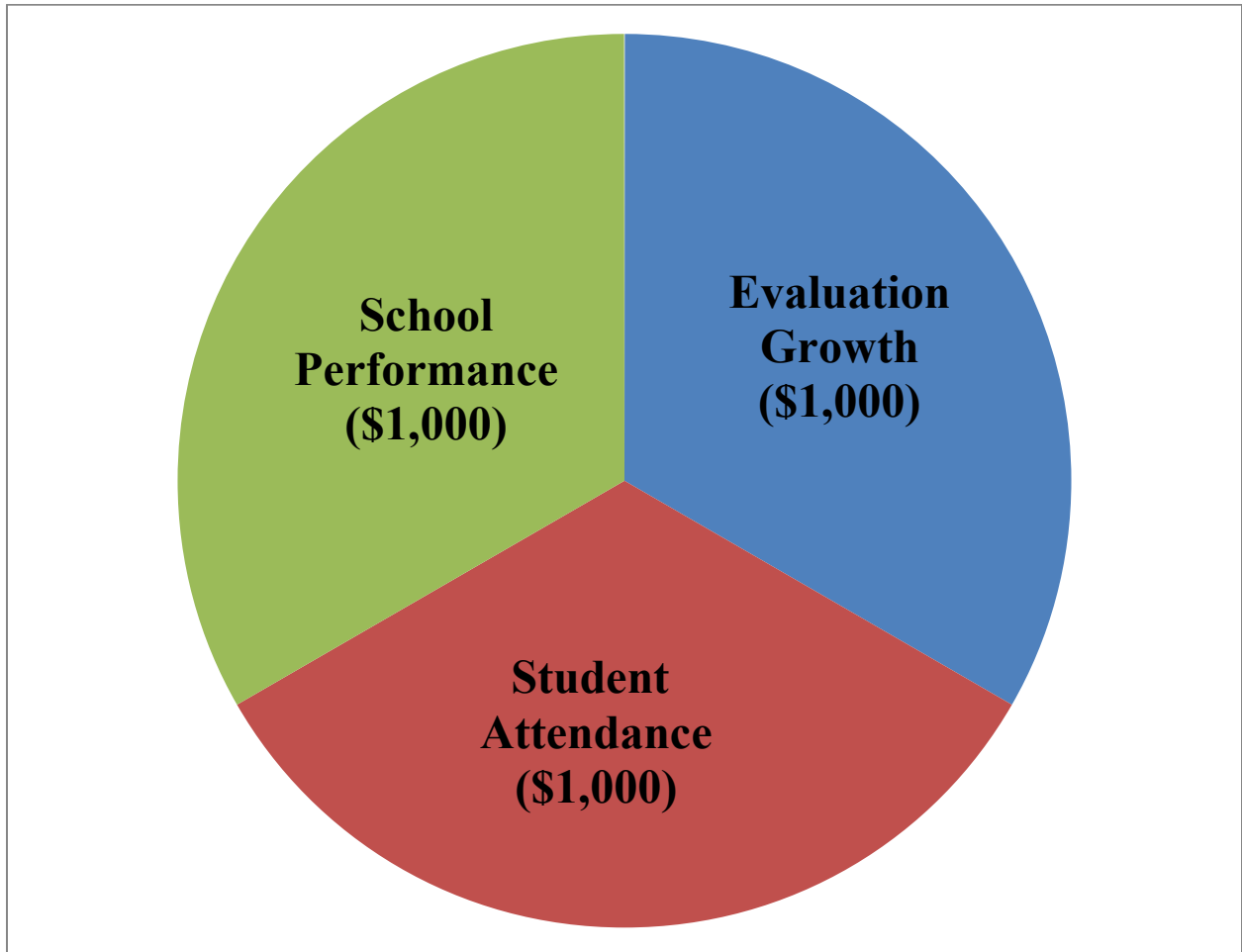
1. The performance bonus will be paid in June 2017 based on results from the 2016-2017 school year.
  
2. A staff member who is not 100% employed will receive a percentage of the bonus amount for which he/she is eligible that matches his/her employment percentage. In addition, if a staff member's assignment is split between two schools, he/she will receive a percentage of the bonus amount for which he/she is eligible that matches his/her

employment percentage at a particular school. For example, if an assistant principal is employed for 50% at two different schools, 50% of each bonus category will be aligned with his/her performance at each school.

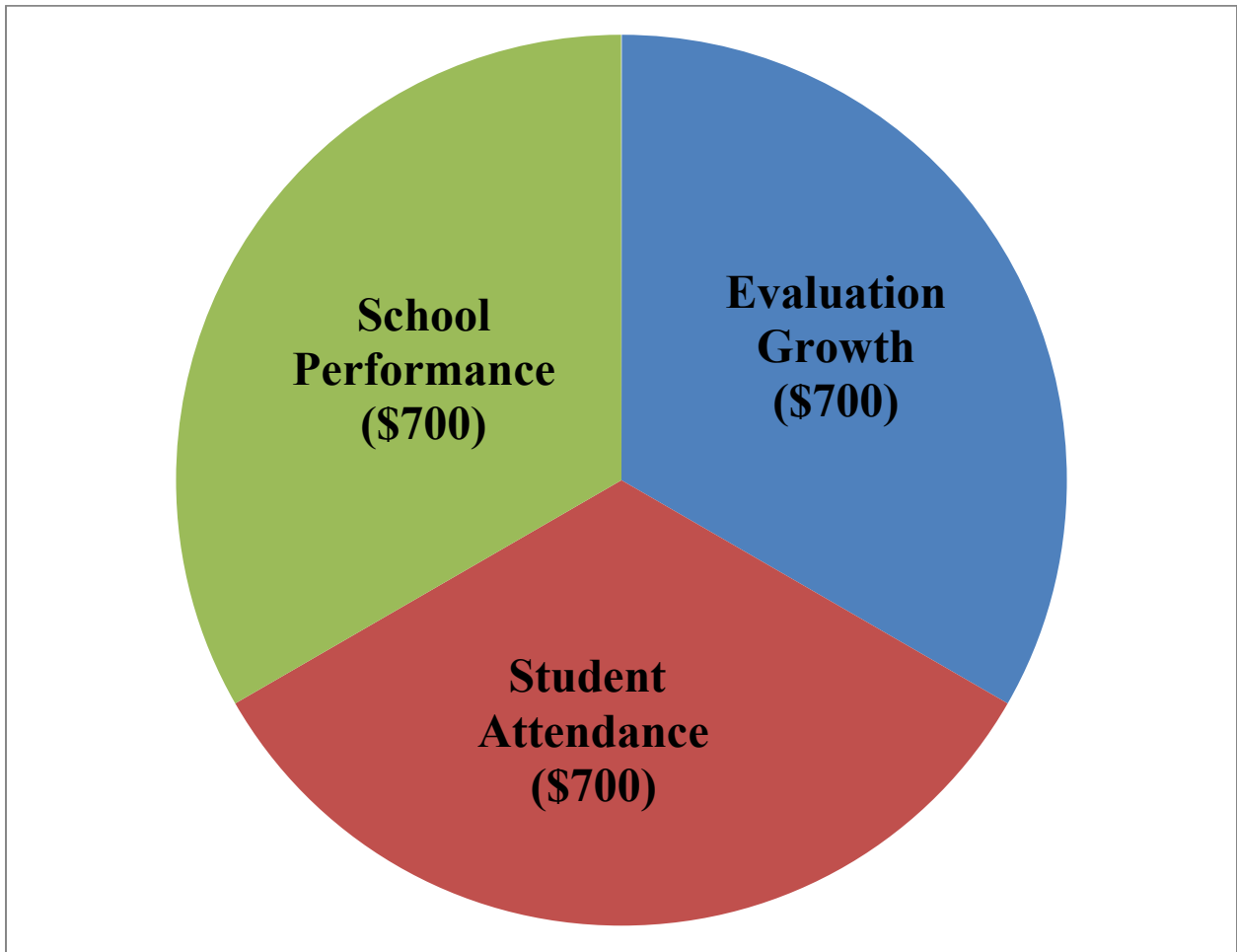
3. This entire plan is contingent on the school system's receipt of the "Merit-Based Bonus" funds from the state in the expected amounts.
4. Payments to employees under this plan are considered "special duty" pay. Such payments are not considered part of an employee's base pay. Furthermore, the elimination or reduction of this pay for an employee does not constitute a "demotion." In addition, no expectation for this pay to extend beyond the 2016-2017 school year exists.
5. If a staff member leaves the school system prior to the conclusion of the 2016-2017 school year, he/she will not be eligible for any part of the merit-based bonus plan.
6. A staff member will be awarded the bonus amounts for his/her success with one, two, or three parts of the merit-based bonus plan associated with his/her position.



# Merit-Based Bonus Plan for Principals



# Merit-Based Bonus Plan for Assistant Principals



# Merit-Based Bonus Plan for Principals & Assistant Principals Evaluation Instrument Rating Guide

<b>Evaluation Instrument</b>	<b>0</b>	<b>0</b>	<b>1</b>	<b>2</b>	<b>3</b>
Principal	Not Demonstrated	Developing	Proficient	Accomplished	Distinguished
Assistant Principal	Not Demonstrated	Developing	Proficient	Accomplished	Distinguished

## Asheboro City Board of Education

### 2016-2017 Merit Bonus Plan

Years of Service as of December 01, 2016	Merit Bonus
0-5	\$225
6-15	\$325
16-25	\$425
26+	\$525

- Merit pay will only be paid to employees who are employed as of December 1, 2016.
- Merit pay will be distributed on December 14, 2016.
- For part-time employees, the bonus shall be pro rata based on the number of hours worked.
- Merit pay is not subject to retirement.
- Based on state law, employees eligible for merit pay must be paid on a salary schedule other than a teacher based salary schedule.
- While the language in the General Assembly bill indicates that merit pay will only go to “state paid” employees, Asheboro City Schools will use local and federal funds to pay eligible non state funded employees.

Richmond County Schools presents the following plan for the State Legislated Merit Based Pay:

- No Teacher nor Instructional Support Personnel will receive Merit Pay as legislated by the bill
- Principals and Assistant Principals that were employed for the 2015-2016 school year and that are still employed at Richmond County Schools that Met Expected Growth or Exceeded Expected Growth for 2015-2016 will receive merit pay.

**Exceeded Growth** - \$3,000 per Principal and \$1,500 per Assistant Principal

**Met Growth** - \$2,000 per Principal and \$1,000 per Assistant Principal

To be paid by end of October, 2016

- Teacher Assistants are eligible for a merit bonus if **one or both** of the following conditions are met:

\*\*\*\* If employed by September 1, 2016, a \$250.00 merit bonus will be paid if only 1 day absent from work from the dates of September 30, 2016 til January 13, 2017. If the TA is employed less than full time, the merit pay will be based on the percentage employed. The employee must still be employed on the date the merit bonus is to be paid - January 31, 2017. The Merit pay is subject to taxes.

\*\*\*\* If employed by January 17, 2017, a \$250.00 merit bonus will be paid if only 1 day absent from work from the dates of January 17, 2017 til June 2, 2017. If the TA is employed less than full time, the merit pay will be based on the percentage employed. The employee must still be employed on the date the merit bonus is to be paid – June 23, 2017. The merit pay is subject to taxes.

- Custodians are eligible for a merit bonus if **one or both** of the following conditions are met:

\*\*\*\* If employed by September 1, 2016, a \$250.00 merit bonus will be paid if only 1 day absent from work from the dates of October 3, 2016 til January 13, 2017. If the custodian is employed less than full time, the merit pay will be based on the percentage employed. The employee must still be employed on the date the merit bonus is to be paid - January 31, 2017. The Merit pay is subject to taxes.

\*\*\*\* If employed by January 17, 2017, a \$250.00 merit bonus will be paid if only 1 day absent from work from the dates of January 17, 2017 and June 2, 2017. If the custodian is employed less than full time, the merit pay will be based on the percentage employed. The employee must still be employed on the date the merit bonus is to be paid – June 23, 2017. The merit pay is subject to taxes.

- Bus Drivers driving **both morning and afternoon routes** are eligible for a merit bonus is **one or both** of the following conditions are met:

\*\*\*\* If employed by September 1, 2016, a \$250.00 merit bonus will be paid if only 1 day absent from work from the dates of October 3, 2016 til January 13, 2017. The employee must still be employed on the date the merit bonus is to be paid - January 31, 2017. The Merit pay is subject to taxes.

\*\*\*\* If employed by January 17, 2017, a \$250.00 merit bonus will be paid if only 1 day absent from work from the dates of January 17, 2016 and June 2, 2017. The employee must still be employed on the date the merit bonus is to be paid – June 23, 2017. The merit pay is subject to taxes.

- Bus Drivers driving **only a morning OR afternoon routes** are eligible for a merit bonus is one or both of the following conditions are met:

\*\*\*\* If employed by September 1, 2016, a \$125.00 merit bonus will be paid if only 1 day absent from work from the dates of October 3, 2016 til January 13, 2017. The employee must still be employed on the date the merit bonus is to be paid - January 31, 2017. The Merit pay is subject to taxes.

\*\*\*\* If employed by January 17, 2017, a \$125.00 merit bonus will be paid if only 1 day absent from work from the dates of January 17, 2017 and June 2, 2017. The employee must still be employed on the date the merit bonus is to be paid – June 23, 2017. The merit pay is subject to taxes.

- Child Nutrition Employees that are employed at the individual schools are eligible for a merit bonus is **one or both** of the following conditions are met:

\*\*\*\* If employed by September 1, 2016, a \$250.00 merit bonus will be paid if only 1 day absent from work from the dates of October 6, 2016 til January 13, 2017. If the child nutrition employee is employed less than full time, the merit pay will be based on the percentage employed. The employee must still be employed on the date the merit bonus is to be paid - January 31, 2017. The Merit pay is subject to taxes.

\*\*\*\* If employed by January 17, 2017, a \$250.00 merit bonus will be paid if only 1 day absent from work from the dates of January 17, 2017 and June 2 , 2017. If the child nutrition employee is employed less than full time, the merit pay will be based on the percentage employed. The employee must still be employed on the date the merit bonus is to be paid – June 23, 2017. The merit pay is subject to taxes.

- If one of the above job classifications is dually employed as another one of the above job classifications, they will qualify for the bonus under both job classifications. For example – An employee who is employed 100% as a custodian but also drives a bus route in the mornings and the afternoons, would be eligible for the \$1,000.00 merit pay for cumulative. (Both semesters).
- Another example: An employee who is employed as a teacher assistant for 100% of the time and drives a morning bus route would be eligible for \$750.00 merit bonus cumulative (both semesters).

-----The 1 day absent is per job classification. In the above example, the TA misses two morning routes but does not miss a day in the TA job, she would be eligible for \$500.00 merit pay.

The following holidays and scheduled annual days are not included in the absent calculation –

November 11, 23, 24 and 25  
 October 10 (EARLY COLLEGE ONLY)  
 December 21 through 30  
 April 14 through 21  
 May 29 (EXCLUDES EARLY COLLEGE)  
 Any day deemed Inclement Weather Day

Also, **for Teacher Assistants only**, these additional teacher workdays are not included in the absent calculation:

October 10 (EARLY COLLEGE ONLY TA's)  
 December 19 and 20  
 February 20  
 March 23

May 19, 22, 23, 24, 25, 26 (EARLY COLLEGE TA's ONLY)

June 9, 12, 13, 14, 15 and 16 (EXCLUDES EARLY COLLEGE TA's)

If any of these holidays, annual leave days or teacher workdays become working days due to inclement weather, they then become part of the absent day calculation.

**Employees are allowed only one hour to miss for an appointment of any type.**

- Should there be extra funds remaining after the “no more than 2 absents” merit pay, the remaining funds will be distributed to Principals and Assistant Principals based on their 2016-2017 Proficiency increase. The formula will be determined by the amount of funds remaining.

## **2016-17 Merit Based Bonus Proposal Public Schools of Robeson County**

### Introduction

#### **36.1A, 2016 Appropriations Act, Merit Based Bonus for Non Educators**

Merit-based bonuses for non-educators, including school based administrators, central office and non-certified personnel. Certified educators (classroom teachers) are not eligible. LEAs shall provide to DPI details of how these funds are distributed by district and school by Dec. 14, 2016.

Public Schools of Robeson County – Executive cabinet, central office administrators, principals, and assistant principals will not be eligible for this bonus. Classified employees will be the only eligible group as long as they meet all stated criteria.

#### **To be eligible, qualified employees must meet all of the following criteria:**

1. Employment date – Must be employed on or before 7/1/2016 as a permanent- full or part-time employee and still in pay status when the bonus is paid in June. If part-time, bonus will be prorated based on % employed.
2. Attendance – 95% of student days from January 3<sup>rd</sup>, 2017 – May 1<sup>st</sup>, 2017
3. Evaluation – qualified employee must have “meets expectations” and/or higher on their summary evaluation (2<sup>nd</sup> semester 2016-17)

State allotment – \$318,703 (Bonus amount plus FICA)

Paid – June 2017

Amount – unknown until exact number of participants are calculated. The bonus will be paid in varying flat amounts based on total years of NC state service as follows:

0 – 4/5 – 9/10 – 14/15 – 19/20 and up

### Notes

Employees paid from non-state sources will be paid the same amount as state-paid employees.



# Rockingham County Merit Based Bonus Proposal

## 2016- 2017 RCS Classified Staff Merit Bonus

State Allotment: \$160,889

### Classified Staff Employee

The RCS Board of Education, in accordance to state allocated funds, will issue a one-time bonus to classified employees, based on the following criteria of merit:

- Based upon years of RCS experience in 2016-17. If an employee has left RCS and returned, years of experience will be based on longevity.
- Must have been employed (in pay status) by RCS in a permanent classified position as of 1/1/2016.
- Must be currently employed (in pay status) by RCS in a permanent classified position as of 11/1/2016.
- For part-time employees, the bonus shall be prorated based on the number of hours/percent employed.
- Employees that are employed less than 20 hours per week (less than 50%) are not eligible for the bonus.
- Employees should not have had a disciplinary letter placed in their HR personnel file between 1/1/2016 and 11/1/2016.
- Bonus will be paid in February 2017.
- Bonus will not be subject to retirement withholding, but will be subject to FICA taxes.

<b>Years of Experience</b>	<b>Bonus ***</b>
1-5 years	\$320
6-10 years	\$370
11-15 years	\$420
16-20 years	\$470
21+	\$520

**\*\*\*Amounts are estimated based upon the exact number of employees that qualify. Amounts will be adjusted to ensure utilization of 100% of the state provided funds.**

## 2016- 2017 RCS Bus Driver Merit Bonus

### Bus Driver Bonus

The RCS Board of Education, in accordance to state allocated funds, will issue a one-time bonus to Bus Drivers, based on the following criteria of merit:

- A one-time bonus will be paid to employees who drove a bus (to and/or from school) 20 cumulative hours or greater during the 2016-17 school year prior to 11/1/2016.
- All bus drivers (including those employed less than 20 hours (50%), and bus substitutes), will be eligible for this bonus.
- Employee should not have had a disciplinary letter placed in their HR personnel file between 7/1/2016 – 11/1/2016.
- Employees will be eligible for classified employee bonus, and additional bus driver bonus, if they qualify for both.
- Bonus will be paid in February 2017.
- Bonus will not be subject to retirement withholding, but will be subject to FICA taxes.

<b><i>Drove a bus &gt; 20 hours total</i></b>	<b><i>Bonus ***</i></b>
YES	\$300

***\*\*\*Amounts are estimated based upon the exact number of employees that qualify. Amounts will be adjusted to ensure utilization of 100% of the state provided funds.***

## 2016- 2017 RCS Building Administration Merit Bonus

### Principal/Assistant Principal

The RCS Board of Education, in accordance to state allocated funds, will issue a one-time bonus to Building Administrators, based on the following criteria of merit:

- A one-time bonus will be paid to building level principals/Assistant Principals who were employed in a contracted administrative position effective 1/1/2016, and whose school demonstrated the following criteria of merit:
- School demonstrated meets or exceeded expected growth for the 2015-16 school year.
- Received a rating of proficient or higher on all summative evaluation standards for the 2015-16 school year.
- Building level principal/Assistant principal must be currently employed effective 11/1/2016.
- Building level principal/Assistant Principal remains eligible for the bonus, if currently assigned to another school as a building level principal effective 11/1/2016.
- Employee is not eligible if, although employed with the district, no longer remains at the building level principal role effective 11/1/2016.
- Bonus will not be subject to retirement withholding, but will be subject to FICA taxes.

Any building level administrator who meets the above levels of merit will receive a one-time bonus to be paid in February 2017, as follows:

<b>2015- 2016 School Growth</b>	<b>Bonus Amount***</b>
Met Expected Growth	\$300
Exceeded Expected Growth	\$400

**\*\*\*Amounts are estimated based upon the exact number of employees that qualify. Amounts will be adjusted to ensure utilization of 100% of the state provided funds.**



## **Merit Pay Rubric for Classified Employees**

Eligibility will be determined by meeting all of the following criteria:

1. Employees must have been employed by RSS since 9/1/2015.
2. Employees must be currently employed in RSS in an eligible position.
3. Evaluation
  - a. All ratings must be at standard in all categories and have at least one above standard in at least one category.
  - b. The employee cannot have any letters of reprimands between 9/1/2015 and current.
  - c. The employee cannot have been or currently be on a performance plan because of performance issues from 9/1/2015–12/31/2016.
  - d. If there is no evaluation on file:
    - i. This defaults to an “eligible” standing for the employee.
4. Professional Development
  - a. 3 hours of voluntary professional development will be completed by selecting one of the options listed below:
    - i. 3 hours of professional development will be offered on identified Saturdays at a district site 9:00-12:00.
    - ii. Employees can use computers at the school site, public libraries, or personal devices, check out device from the district (when a device is available) to complete the 3 hours of online modules.
    - iii. Employees can ask for paper copies of articles to read and will complete the assignments and submit the completed work to their supervisor.

The final bonus will be determined by the number of eligible participants divided by the allocation from the state. Employees must meet all of the required criteria as stated above and submit the required form to their supervisor by December 21, 2016. All eligible participants will qualify for a one-time bonus of at least \$235.00. The bonus will be paid in February, 2017.



Robert H. Mason, Ed.D.  
Superintendent

## BOARD OF EDUCATION

Barry Gold, Chair  
John Mark Bennett  
Ritchie Garland  
Brandon Gosey

Sherry Bright, Vice-Chair  
Jackie Hampton  
Carolyn Keever

## MERIT-BASED BONUSES FOR STATE-FUNDED PERSONNEL

### INTRODUCTION

Session Law 2016-94 authorized merit-based bonuses for state-funded personnel subject to these legislative requirements:

**Section 36.1A.(a)** Funds for Merit-Based Bonuses. – Of the funds appropriated in this act from the General Fund and Highway Fund to the Compensation Bonus Reserves, nonrecurring funds for the 2016-2017 fiscal year are authorized generally to provide employing agencies with funds to award one-time merit-based bonuses to State-funded personnel in accordance with eligibility policies adopted by the employing agencies. The eligibility policy shall not provide an across-the-board bonus for this purpose. Notwithstanding G.S. 135-1(7a) and G.S. 135-53(5), merit-based bonuses awarded under this Part are not compensation under Chapter 135 of the General Statutes.

**Section 36.1A.(b)** Employing Agency. – For the purposes of this Part, "employing agency" includes the following entities employing State-funded personnel:

- (1) The State Human Resources Commission, for executive branch departments with respect to both EHRA and SHRA employees, except University of North Carolina EHRA employees.
- (2) The Administrative Office of the Courts and the Commission on Indigent Defense Services, for the judicial branch.
- (3) The Legislative Services Commission, for the legislative branch.
- (4) The Board of Governors of The University of North Carolina, except as to its SHRA employees.
- (5) The State Board of Community Colleges, for the North Carolina Community College System.
- (6) Each local board of education, for school-based administrators, central office, and noncertified personnel. Educators are not eligible.

**Section 36.1A.(c)** Reporting. – Each local board of education shall provide to the Department of Public Instruction (DPI) the details of how these funds are distributed by district and school. All other employing agencies, and DPI, shall report to the chairs of the Senate Appropriations/Base Budget Committee and the House of Representatives Committee on Appropriations and the Fiscal Research Division on the use of these funds by no later than February 1, 2017.

**Rutherford County Schools Vision:** All Rutherford County students will graduate prepared for college and career success.

The Rutherford County Board of Education establishes the following conditions and requirements for eligibility, award amounts, and award disbursements pursuant to S.L. 2016-94, Sec. 36.1A.

### **ELIGIBILITY**

In order to receive the award, an employee:

- Must have been hired prior to January 1, 2016, and must be continuously employed through the date of merit pay disbursement;
- Must not have received any summary evaluation rating below “consistently models standards of performance” during the 2015-16 school year; and,
- Must not have been the subject of any disciplinary action (including letters of reprimand placed in his or her personnel file) after July 1, 2016.

The following categories of employees are eligible to receive the award:

- Teacher assistants who drive a bus. The employee must have driven a yellow school bus at least once between July 1, 2015 and September 30, 2016.
- Prekindergarten teacher assistants who drive a bus. The employee must have driven a yellow school bus at least once between July 1, 2015 and September 30, 2016.
- School nutrition employees who drive a bus. The employee must have driven a yellow school bus at least once between July 1, 2015 and September 30, 2016.
- All employees who drive regular yellow bus routes, excluding bus drivers who are employed as teachers or instructional support personnel as prohibited by legislation
- Custodians
- School-based and central office clerical employees
- Transportation department employees
- Technology department employees

### **AMOUNT OF AWARDS**

The amount of an award disbursed under this plan shall be \$ 527.00 for full-time employees. Employees who are not employed full-time in the eligible areas will receive a pro rata portion based on their percentage of employment.

### **DATE OF PAYMENT**

Awards disbursed under this plan shall be issued to eligible employees on Friday, December 16, 2016.

### **SPECIAL CONDITIONS**

The Superintendent shall administer this plan in accordance with guidance published by the State of North Carolina’s Office of State Human Resources in a memorandum dated September 9, 2016 and entitled “2016 Appropriations Act - Compensation Bonus/Merit-Based Bonus/Bonus Leave.”

# Sampson County Merit Based Bonus Proposal



## **MERIT-BASED BONUSES**

---

The board will award one-time merit-based bonuses to eligible employees in December, 2016 in accordance with the plan outlined here and North Carolina Session Law 2016-94, section 36.1A. To be consistent with law, the allocation of these one-time bonuses will not be across-the-board. The amount of bonus awarded will not be added to the employee's ongoing base salary and will not be considered compensation for retirement purposes.

### **A. ELIGIBILITY**

To be eligible for a one-time merit-based bonus, an employee must meet the requirements established below.

#### 1. Position Requirements

- Employed in a permanent (full-time/part-time), probationary, or time-limited appointments, including those permanent full-time employees who work a 9, 10, or 11-month schedule
- Not paid on the teacher salary schedule (cafeteria staff, maintenance staff, teacher assistants, bus drivers, clerical staff, school and central office administrators)
- Employed on or before January 1, 2016 with no break in service
- Employed on the last day of the pay period in which payment is disbursed

#### 2. Performance Requirements

- No active disciplinary action as of October 1, 2016
- Overall performance evaluation ratings of “meets”, “at standard”, “proficient” or higher on 2015-16 evaluation.
  - Note: Employees on a Leave Of Absence (LOA) must have at least six (6) months of cumulative work under a performance plan in order to be eligible to receive a performance evaluation rating. If an employee is on LOA during the time of the annual performance evaluation period, supervisors must rate the employee upon return from LOA during the 2016-2017 performance period.

### **B. AMOUNT OF BONUS**

The superintendent shall ensure that the total amount of funds awarded do not exceed the amount of funds provided by the state for the purpose of providing merit-based bonuses. Bonuses shall be allocated as follows:

---

---

School-Based Administrators (\$300 maximum)

	Tier 1 (\$25)	Tier 2 (\$50)	Tier 3 (\$75)	Tier 4 (\$100)
Extra Duties	MS AP/Elem AP - \$25	Elem Prin/HS AP - \$50	MS Principal - \$75	HS Principal - \$100
School Growth	Did not meet - \$0	Met - \$50	Exceeded - \$100	
Attendance	10+ student days - \$0	6-10 student days - \$50	1-5 student days - \$100	

Central Office Administrators and Classified Staff (\$300 maximum)

Extra Duties	None - \$0	Intermittent - \$50	Continuous - \$100
Behavior	Discipline - \$0	No Discipline - \$100	
Attendance	10+ student days - \$0	6-10 student days - \$50	1-5 student days - \$100

**C. TIMELINE**

- Tuesday, October 18<sup>th</sup> - Board Work Session - presentation
- Monday, October 24<sup>th</sup> - Board Meeting - approval
- Wednesday, October 26<sup>th</sup> - send spreadsheets to schools/departments
- Wednesday, November 9<sup>th</sup> - due date for spreadsheets to be returned
- Friday, December 9<sup>th</sup> - pay date for merit bonus

## **MERIT-BASED BONUSES PLAN – Pending Board Approval on November 7, 2016**

The board will award one-time merit-based bonuses to eligible employees in December, 2016 in accordance with the plan outlined here and North Carolina Session Law 2016-94, section 36.1A. To be consistent with law, the allocation of these one-time bonuses will not be across-the-board. The amount of bonus awarded will not be added to the employee's ongoing base salary and will not be considered compensation for retirement purposes.

### **A. ELIGIBILITY**

To be eligible for a one-time merit-based bonus, an employee must meet the requirements established below.

#### **1. Position Requirements:**

- a. Employees with permanent (full-time/part-time), probationary, time-limited and temporary\* appointments are eligible, including those permanent full-time employees who work a 10, or 11-month schedule. Employee must be a state-funded school based administrator, central office employee or non-certified employee.
- b. No funds are provided by the state for bonuses for locally-paid employees. All locally paid employees in similar positions will be paid from local funds. Teachers and instructional personnel who are paid on the teacher salary schedule are not eligible for the merit bonus.
- c. The compensation bonus does not apply to employees separated from State service prior to September 1, 2016 or to employees hired effective September 2, 2016 or later.
- d. Employees on paid or unpaid LOA effective September 1, 2016, are eligible for the compensation bonus.
- e. Bonuses for part time employees will be paid a pro rata amount according to the percentage of their employment.

\*State Appropriated funds are not allotted for temporary employees, therefore granting temporary employees the compensation bonus would be at the sole discretion of the agency, if funding permits.

## 2. Rubric

Rubric for Administrators

Category	3 points received	2 points received	1 point received
Attendance (# of days absent in 2015-16)	0-4 days	5-7 days	8-10 days
Years of experience with NC Retirement System	20+	10-19	0-9
2015-16 Summative Evaluation Rating	Distinguished	Accomplished	Proficient
Degree	Doctorate	Masters	Bachelors

Rubric for Custodians

Category	3 points	2 points	1 point
Attendance (# of days absent in 2015-16)	0-4	5-7	8-10
Years of experience with NC Retirement System	20+	10-19	0-9
2015-16 Summative Evaluation Rating	Above Standard	At Standard	
End of Year Safelle Rating	98-100	95-97	91-94

Rubric for Maintenance/Clerical/ Teacher Assistants/Technology

Category	3 points	2 points	1 point
Attendance (# of days absent in 2015-16)	0-4	5-7	8-10
Years of experience with NC Retirement System	20+	10-19	0-9
2015-16 Summative Evaluation Rating	Above Standard/Exceeds	At Standard/Meets	
Degree	Masters	Bachelors/ Associates	Certificate

Rubric for Directors and Coordinators

Category	3 points	2 points	1 point
Attendance (# of days absent in 2015-16)	0-4	5-7	8-10
Years of experience with NC Retirement System	20+	10-19	0-9
2015-16 Summative Evaluation Rating	Above Standard	At Standard	
Degree	Masters	Bachelors	Associates

Rubric for Child Nutrition and Bus Drivers

Category	3 points	2 points	1 point
Attendance (# of days absent in 2015-16)	0-4	5-7	8-10
Years of experience with NC Retirement System	20+	10-19	0-9
2015-16 Summative Evaluation Rating	Above Standard	At Standard	

**B. AMOUNT OF BONUS**

The superintendent shall ensure that the total amount of funds awarded do not exceed the amount of funds provided by the state for the purpose of providing merit-based bonuses. Bonuses shall be allocated as follows:

Administrators, Teacher Assistants, Directors, Coordinators, Clerical, Custodians, Technology and Maintenance employees may earn a total of 12 points.

1 - 4 points = \$200.00

5 - 8 points = \$350.00

9-12 points = \$650.00

\*Bus Drivers and Child Nutrition employees may earn a total of 9 points.

1 – 3 points = \$200.00

4 – 6 points = \$350.00

7 – 9 points = \$650.00

C. **Example**

A Principal who missed 3 days during the 2015-16 school year (3 points), has 15 years of experience with the NC Retirement System (2 points), received a rating of distinguished on his/her end of year summative (3 points) and has earned a Master's degree (2 points) would receive \$650.00.

DRAFT

### 2016-17 Merit Based Bonus Proposal

#### Introduction

#### ***36.1A, 2016 Appropriations Act, Merit Based Bonus for Non Educators***

Merit-based bonuses for non-educators, including school based administrators, central office and non-certified personnel. Certified educators (classroom teachers) are not eligible. LEAs shall provide to DPI details of how these funds are distributed by district and school by Dec. 1, 2016.

Scotland County Schools – Executive cabinet, directors, principals, and assistant principals have voluntarily opted out of eligibility for this bonus, therefore increasing the amount available for other qualifying categories.

#### **To be eligible, qualified employees must meet all three of the following criteria:**

1. Attendance – 97% of student days from Nov 15<sup>th</sup> 2016 – June 1<sup>st</sup> 2017
2. Evaluation – qualified employee must have “meets expectations” and/or higher or equivalent on their last evaluation (2<sup>nd</sup> semester 2016-17)
3. Employment date – Employed on 10/1/2016 as a permanent- full or part-time employee. If part-time bonus will be prorated based on % employed.

State allotment – \$91,152

Paid – June 15<sup>th</sup> 2017

Amount – unknown until exact number of participants are calculated.

#### Notes

Employees paid from non-state sources will be paid the same amount as state-paid employees. For example, if there are 250 qualified state-paid employees (employees paid from state fund 1) then the \$84,178.87 (the amount after employer matching costs) will be divided by 250, equaling \$336.71. All other non-state paid employees will receive the same amount.





# Stanly County Schools Merit-Based Bonus Pay Plan 2016-17

The North Carolina 2016 Appropriations Act, Section 36.1A, appropriated funds to LEAs to distribute as merit-based bonuses to non-educators, including school based administrators, central office and noncertified personnel. Educators (teachers and instructional support personnel paid on the teacher salary schedules) are not eligible.

**STATE-FUNDED PERSONNEL/MERIT-BASED BONUSES AUTHORIZED**

*SECTION 36.1A.(a) Funds for Merit-Based Bonuses. – Of the funds appropriated in this act from the General Fund and Highway Fund to the Compensation Bonus Reserves, nonrecurring funds for the 2016-2017 fiscal year are authorized generally to provide employing agencies with funds to award one-time merit-based bonuses to State-funded personnel in accordance with eligibility policies adopted by the employing agencies. The eligibility policy shall not provide an across-the-board bonus for this purpose. Notwithstanding G.S. 135-1(7a) and G.S. 135-53(5), merit-based bonuses awarded under this Part are not compensation under Chapter 135 of the General Statutes.*

**Eligibility Requirements**

The Stanly County Board of Education has chosen to determine eligibility based on performance evaluations within the school-based job classifications of bus drivers (primary position), custodians, child nutrition workers, secretaries, and teacher assistants. Employees in these positions who were employed prior to January 1, 2016 and are still employed as of April 1, 2017 are eligible if they complete an application and are determined by their supervisor as having met or exceeded expectations. The amount of the bonus will be based on years of service with Stanly County Schools/Albemarle City Schools.

**Amount(s) to Award**

An employee evaluated as not meeting expectations is ineligible for the bonus. There will be a flat dollar amount for 0-10 years of service, a flat dollar amount for 11-20 years of service, and a flat dollar amount for 21+ years of service. The amounts will be different with \$100 increments by level of service. The exact amount for each level will be awarded based on maximizing the state dollars appropriated. The following is an example of what the individual pay might be; however, exact amounts will be determined based on the number of qualifying employees.

Performance Evaluation and Years of Service (Example)			
Does not Meet Expectations	Meets or Exceeds Expectations – 0 to 10 Years of Service to SCS/Albemarle City Schools	Meets or Exceeds Expectations – 11 to 20 Years of Service to SCS/Albemarle City Schools	Meets or Exceeds Expectations – 21+ Years of Service to SCS/Albemarle City Schools
Ineligible	\$400	\$500	\$600

**Payment Date**

This merit bonus pay will be paid April 30, 2017.





# Stanly County Schools Merit-Based Bonus Pay Plan 2016-17

---

## **Special Conditions**

Employees with permanent (full-time/part-time), probationary, and time-limited appointments are eligible. The bonus will be pro-rated by hours and/or percent employed.

### Disciplinary Actions

Employees with an active disciplinary action on April 1, 2017 are not eligible.

### Leave of Absence

Employees on LOA (regardless of type) must have at least six (6) months of cumulative work in order to be eligible to receive a performance evaluation rating. If an employee is on LOA during the time of the merit performance evaluation period, supervisors must rate the employee upon return from LOA during the 2016-2017 performance period. Stanly County Schools will reserve monies for employees returning from LOA who complete an application and meet the aforementioned performance requirements, if the employee returns from LOA on or before June 30, 2017 (fiscal year end).

### Break in Service

Employees who had a break in service with Stanly County Schools but returned within the evaluation period are eligible.

Example: An employee was actively employed since June 2015 but separated March 25, 2016. This employee was under a performance plan for at least six (6) months. If the same employee is reinstated to SCS on May 2, 2016, he or she would be eligible for the merit-based bonus regardless of the break in service.

### Separations

The merit-based bonus does not apply to employees separated from service prior to the last day of the pay period in which payment is disbursed.

### Funding Sources

Any eligible employee whose annual salary is paid from sources other than the State Public School Fund shall receive the bonus from the source of funds that pays for the employee's salary.

# Stokes County Schools

## Merit Bonus Matrix

**Board Approved 11-21-16**

Instructions: 10 or 11 month employees must be employed by August 17, 2016 to be eligible.

12 month employees must be employed by July 1, 2016 to be eligible.

If an employee receives a "does not meet performance" in the evaluation criterion, they are ineligible for the bonus pay even if they have points on other criteria of the matrix. Supervisors must submit completed matrix forms to Human Resources no later than April 7, 2017.

Employee Name: \_\_\_\_\_

Position(s): \_\_\_\_\_ Site: \_\_\_\_\_

Criteria	Circle Points Selected		
<b>Longevity</b>	20+ years of Service	11 - 19 Years of Service	6 months = 1 year 1 - 10 Years of Service
	3 points	2 points	1 point
<b>2016 - 2017 Evaluation</b>	Exceeds Performance	Meets Performance	Does Not Meet Performance
Based on Evaluation	6 points	3 points	0 points
<b>2016 - 2017 Performance</b>	No discipline letters, memos, action plans since July 2016 to present		
	3 points		

2016-2017 Value Added	Full-time, dual employee	Full-time employee with one defined role	Part-time employee
	3 points	2 points	1 point
<b>Total Points</b>			
<b>Maximum of 15 points</b>			
Each point equates to approximately \$21.63 for 260 state-funded employees			
Bonus amount will be dependent upon points for eligible employees. Bonuses will be paid in April 2017.			
Employees who separate employment prior to April 1 or who are on leave of absence and do not have a current year evaluation are not eligible for the bonus.			
<b>Eligible Employees</b>			
School Based Administrators			
Directors			
Teacher Assistants			
Clerical Staff			
Bus Drivers			
OTs and PTs			
Custodians			
Supervisor's Signature/Date			
Employee Signature/Date			

Surry County Schools

Merit Pay Plan

2016

---

Surry County School Employees will be granted the merit pay who meet the following criteria:

- Employees who fall under the Fair Labor Standard Act (FLSA) 40 hour work week limitations.
- Were employed during the period from July 1, 2015 – June 30, 2016.
- Must have been employed at least 6 months (by January 1, 2016).
- Did not have a break in service from Surry County Schools and remain employed at the time the merit pay is issued (December 2016).
- Employees with evaluations at the end of the year (2015-16) with all standards rated "at standard" or above.
- Employees without any negative personnel action (letter of reprimand, suspension etc.) from July 1, 2015 – June 30, 2016.

Eligible employee classifications include:

- Teacher Assistants
- Clerical/Office Support (School and District)
- Child Nutrition (Exception Director)
- Maintenance (Exception Director)
- Transportation (Exception Director)
- Custodians
- Bus Drivers/Monitors
- Technicians

Notes:

- Employees who worked less than 10 months would have a prorated amount.
- Employees who worked less than 100% would have a prorated amount.
- Employees who were on a leave of absence from July 1, 2015 – June 30, 2016 (employee had to work at least 6 months of cumulative work during the period and have a performance rating to qualify.)
- Employees who are currently on leave and return before merit pay is issued in December are eligible.
- Employees who are on leave as of December 2016 and return to work by June 30, 2017 (money will be placed in escrow for merit pay upon their return.

# Elkin City Schools

---

## **Approved Merit Pay Plan December 5, 2016**

The board will award one-time merit-based bonuses to eligible employees in January, 2017 in accordance with the plan outlined here and North Carolina Session Law 2016-94, section 36.1A. To be consistent with law, the allocation of these one-time bonuses will not be across-the-board. The amount of bonus awarded will not be added to the employee's ongoing base salary and will not be considered compensation for retirement purposes. Eligible full time equivalent merit pay amount is \$606.43.

### **Employee Classification**

Employees who are paid on a teacher based pay scale are not eligible. For example: teachers, counselors, psychologists, nurses, or contracted personnel. All other employees are eligible for the merit-based bonus if they meet the following criteria.

### **Employment Term**

Other than above, employees who were employed by Elkin City Schools for at least six (6) months during the 2015-16 school-year and were employed by January 1, 2016 are eligible. Recipients of merit pay must be employed in an eligible position by Elkin City Schools at the time of the merit-based payment in January, 2017.

### **Performance**

Employees with an overall evaluation summary at the end of the 2015-2016 school-year must be rated Distinguished/Outstanding OR Accomplished/Above Average to be eligible.

### **Prorated Payments**

Employees who worked less than ten (10) months of a 10 month term or less than twelve (12) months of a 12 month term would receive a prorated merit-based bonus payment of. For example: an employee who worked 6 months of a 10 month term would receive 60% of the full amount or an employee who worked 6 months of a 12 month term would receive 50% of the full amount.

Employees who worked in a part-time position of at least 50% and meet the above criteria would receive a prorated merit-based bonus payment. For example: an employee who worked in a 20 hour per week position would receive 50% of the full amount.

### **Leave of Absence**

Employees on a paid Leave of Absence during the 2015-2016 school year and have at least six (6) months of cumulative work from the 2015-2016 school year and return to employment in an eligible position by the date of the merit-based payment in January, 2017 will be eligible for a prorated payment.

### **Break in Service**

Employees, who separate from Elkin City Schools with a break in service, are not eligible.

### **Separations**

The merit-based bonus does not apply to employees separated from Elkin City Schools' service prior to the last day of the pay period in which the payment is disbursed.

### **Transfers**

Employees who have transferred from a position with Elkin City Schools to another position within Elkin City Schools and meet the other eligibility requirements would be eligible for the merit-based bonus pay.

## **Mount Airy City Schools Proposed Merit-Based Bonus Allocation**

### **Background:**

The State Board of Education approved the allocation method for the merit-based bonus appropriated in SL 2016-94 Section 36.A1. Mount Airy City Schools has received an allocation of \$25,355 for fiscal year 2016-17.

Each LEA must have a locally approved plan that determines the distribution. The bonuses shall:

- Be distributed based on a locally approved plan
- Not be distributed across the board
- Be distributed based on criteria for the 2015-16 school year
- Not be paid to certified teacher or instructional support
- Be paid to state funded personnel only
- Be paid anytime in the 2016-17 fiscal year
- Be awarded only to employees hired on or before January 1, 2016

Based on the total allotment allocated by the state, the total amount available to each individual, if they were to receive a full share, would be \$400.00, \$600.00 or \$800.00.

Employees who worked in a part-time position of at least 50%, and meet the criteria, would receive 50% of the full amount.

### **Proposal:**

Based on the stipulation that there cannot be an across the board distribution of merit-based bonus funds, the Mount Airy City Schools Board of Education proposes the funds be distributed based on meeting each of the following criteria:

- Longevity - Based on years of service with Mount Airy City Schools and broken down into the following categories: *1-10, 11-19 and 20+* years of experience.
  - 1-10 years of service = \$400
  - 11-19 years of service = \$600
  - 20+ years of service = \$800
- Performance/Evaluation - Employee had no letter of reprimand placed into their personnel file during the 2015-16 school year.
- Attendance – Employee had an acceptable attendance record of at least 90% during the 2015-16 school year.

### **Timeline:**

The Mount Airy City Schools Board of Education will award one-time merit-based bonuses to eligible employees in February 2017.

# **SWAIN COUNTY SCHOOLS MERIT PAY BONUS FY 2016-2017**



**Approved by Swain County School Board**

November 14, 2016

## **PURPOSE:**

The Swain County School Board will award a one-time merit-based bonus to eligible employees in May, 2017 in accordance with the plan outlined here and North Carolina Session Law 2016-94, section 36.1 A. To be consistent with law, the allocation of these one-time bonuses will not be across-the-board. The amount of the bonus awarded will not be added to the employee's ongoing base salary and will not be considered compensation for retirement purposes.

Swain County Schools values quality staff and feels you must have quality staff in order to provide a quality education and a good positive atmosphere for our students. The areas that the Swain County Board of Education feel attributes to a quality employee is a performance level at or above standard, good attendance and on-time to work and good health and fitness habits. The School Board feels that good health directly affects a person's quality of work and attendance and therefore, encourages and would like to reward those who have taken steps to improve their health in addition to performing at or above standard.

## **FUNDING:**

\$39,868 for State funded positions

\$14,000 for local funded positions(estimated)

\$10,000 for Child Nutrition fund (estimated)

\$3,000 Federal funds for federal positions if allowable, otherwise, cover with local funds

Any amount paid to State funded employees over the State allocation will be paid from local funds if necessary.



## **POSITION REQUIREMENTS:**

Non-educators, including, school based administrators and central office employees, and non-certified employees, including, teacher assistants, administrative assistants, custodians, maintenance staff, cafeteria staff, bus garage staff and bus drivers.

Permanent (full-time/part-time) and probationary employees **(part-time employees will be paid a pro-rata share based on their percent employed and/or scheduled hours)**

Must have been hired on or before September 1, 2016

Must be employed at the time of the bonus payment in May 2017

Teachers and instructional personnel paid on the teacher salary schedule **are not** eligible

## **PERFORMANCE: (worth a total of \$150)**

Employee

s must have an evaluation completed by their supervisor for their primary job by March 31, 2017

Employee must not have a formal written reprimand placed in their personnel file after September 1, 2016 and up until the time the bonus is paid

## **ATTENDANCE: (worth a total of \$100)**

Employee must be in good standing with attendance and tardies and not have been written up as a result of poor performance attributed to their attendance

## **HEALTH PLAN PARTICIPATION: (worth a total of \$100)**

\$50 for signing up to participate in the program either online or with Sonya Blankenship by 1/31/17 and have at least participated in 1 wellness plan activity by 3/31/17

\$50 for accumulating 500 points or more by 3/31/17

## **TIMELINE:**

November 14, 2016 - School Board approves plan

November 15, 2016 - Approved plan provided by email to all staff

December 1st - Evaluations begin

March 31st - Evaluations completed and turned into Regina Mathis for review and compilation

March 31st - Attendance and Health Plan Participation records turned into Regina Mathis for compilation

April 30th - Final list of qualified staff and amounts developed for review

May 2017 - Bonus paid to qualified staff



# TRANSYLVANIA COUNTY SCHOOLS

Morris Education Center  
225 Rosenwald Lane  
Brevard, NC 28712

828 / 884-6173 Main  
828 / 884-9524 Fax  
www.tcsnc.org

## Board of Education

Tawny McCoy, *Chair*  
Ron Kiviniemi, *Vice Chair*  
Marty Griffin  
Cindy Petit  
Betty Scruggs

## Superintendent

Jeff McDaris, Ed.D.

November 21, 2016

Transylvania County Schools Board of Education (BOE) approved our Merit Pay plan during the regularly scheduled BOE meeting on November 21, 2016.

I. Eligibility requirements:

- Employees who are nonexempt based on FLSA guidelines,
- school-based and central office administration are excluded from plan,
- must have been employed since August 24, 2015,
- remain employed at the time the merit pay is issued (January 2017), and
- employees who do not have any negative personnel actions from August 24, 2015 through June 30, 2016.

II. Amount to award

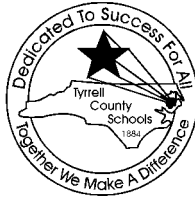
- 190 employees are eligible for consideration based on legislative guidelines for Merit Pay. However, with the implementation of the criteria listed above, 117 employees will receive a merit pay bonus in the prorated amount (based on hours of employment) of \$330.17.

III. Payment date

- Bonuses will be paid in January 2017.

Brian Weaver, Senior Human Resources Director

11/22/16  
Date



# **Tyrrell County Public Schools**

P. O. Box 328 • Columbia, NC 27925

## **Merit Pay Bonus Allocation for Non Educators**

### **Background:**

The State Board of Education approved the allocation method for the merit based bonus appropriated in SL 2016-94 Section 36.A1. Tyrrell County Schools has received an allocation of \$21,508.00 for fiscal year 2016-17.

### **Approved Plan:**

Tyrrell County Board of Education believes that every employee plays a valuable role in the overall function and service of the educational system. As such, and knowing the stipulation that there cannot be an across the board distribution of Merit Pay Bonus funds, on November 7<sup>th</sup>, the Board approved funds be distributed based on the following criteria:

Bonuses shall:

- Be distributed based on the locally approved plan
- Not be distributed across the board
- Not be paid to certified teachers, instructional support staff, principals, or central office administrators
- Be paid to eligible state funded personnel only from the State allotment
- Other eligible non-state funded personnel will be paid from local funds

Employees identified to receive the Merit Pay Bonus shall receive a full share in proportion to their percentage of time employment based on the following:

100% share if the employee meets all of the following:

- Has no rating below “At Standard” or Proficient” on any final rating as noted by their immediate supervisor for the 2015-2016 school year,
- Had no letter of reprimand placed into their personnel file during the 2015-2016 school year,
- Had an acceptable attendance record as indicated by their immediate supervisor during the 2015-2016 school year.

66% share if the employee meets 2 of 3 of the following:

- Has no rating below “At Standard” or Proficient” on any final rating as noted by their immediate supervisor for the 2015-2016 school year,
- Had no letter of reprimand placed into their personnel file during the 2015-2016 school year,
- Had an acceptable attendance record as indicated by their immediate supervisor during the 2015-2016 school year.

33% share if the employee meets 1 of 3 of the following:

- Has no rating below “At Standard” or Proficient” on any final rating as noted by their immediate supervisor for the 2015-2016 school year,
- Had no letter of reprimand placed into their personnel file during the 2015-2016 school year,
- Had an acceptable attendance record as indicated by their immediate supervisor during the 2015-2016

0% share if the employee meets 0 of 3 of the following:

- Has no rating below “At Standard” or Proficient” on any final rating as noted by their immediate supervisor for the 2015-2016 school year,
- Had no letter of reprimand placed into their personnel file during the 2015-2016 school year,
- Had an acceptable attendance record as indicated by their immediate supervisor during the 2015-2016
  
- Based on the total amount allocated by the state, the total amount available to each individual if they were to receive their full share would be approximately \$500.

**Timeline:**

October 3, 2016 – Presentation to Board of Education for review and discussion of Merit Pay Bonus Allocation plan

November 7, 2016 – Approval of the proposed plan by the Board of Education

November 28, 2016 - Distribute the list of eligible employees to the immediate supervisors for their review and final recommendations

December 15, 2016 - Immediate supervisors return completed and signed recommendations to the Superintendent for final review who will in turn forward to the finance department

January 2017 – Distribute of Merit Pay Bonus to eligible employees

# Union County Merit Based Bonus Proposal

## **NON-EDUCATOR MERIT-BASED BONUS PLAN**

The Board will award one-time merit-based bonuses to eligible employees in December 2016 pursuant to North Carolina Session Law 2016-94, section 36.1A and in accordance with the plan outlined herein. To comply with law, the allocation of these one-time bonuses will not be across-the-board. The amount of bonus awarded will not be added to the employee's ongoing base salary and will not be considered compensation for retirement purposes.

### **A. ELIGIBILITY**

To be eligible for a one-time merit-based bonus, an employee must meet the requirements established below.

1. Position Eligibility<sup>1</sup>

To be eligible the employee must have been continuously employed<sup>2</sup> by the district, as follows:

- Beginning no later than January 1, 2016 and in effect through the date of the bonus payment. Approved leaves of absence will not make the employee ineligible for the bonus; and
- Working a minimum of twenty (20) hours per week during a regular weekly schedule.

A list of ineligible positions is attached hereto as Attachment 1.

2. Performance Expectations/Employees in Good Standing

To be eligible the employee must be in good standing, defined as follows:

- Must not have an evaluation in their personnel file for the 2015-2016 year containing a "below standard" rating;<sup>3</sup> and
- Must not have any active disciplinary actions or any discipline, including a reprimand through suspension without pay, during the 2015-2016 or 2016 – 2017 year.

---

<sup>1</sup> According to North Carolina Session Law 2016-94, section 36.1A, educators (certified teachers and instructional support) are not eligible for this one-time Merit Bonus.

<sup>2</sup> "Employee" as defined herein does not include persons under a service agreement or other contract.

<sup>3</sup> UCPS Performance Evaluation Instruments contain the following standards: Attendance; Knowledge of Job; Quality of Work; Appearance; Communication; Cooperation; Organizing/Planning; and Supervisory Ability.

B. AMOUNT OF BONUS

The superintendent shall ensure that the total amount of funds awarded do not exceed the amount of funds provided by the state for the purpose of providing merit-based bonuses. Bonuses shall be allocated as follows:

- Employees working thirty (30) hours per week<sup>4</sup> who meet the performance requirements as indicated above will receive a bonus of \$390.00;
- Employees working between twenty (20) and thirty (30) hours per week<sup>5</sup> who meet the performance requirements as indicated above will receive a bonus of \$290.00; and
- Employees working less than twenty (20) hours are ineligible to receive the bonus as noted above.

C. TIMELINE

- The Deputy Superintendent of Human Resources will compile a list of eligible employees as defined in A.2. above and submit to the Superintendent no later than Friday, December 2, 2016;
- The Superintendent will provide the list of eligible employees to the Chief Finance Officer;
- This plan will be submitted to the Division of School Business Services at NCDPI by the Chief Finance Officer no later than December 1, 2016; and
- The Chief Finance Officer is to prepare payment to be distributed in December.

D. PLAN SUNSET

This plan is effective for the 2016-17 school year only unless the board takes further action to continue it in effect.

Legal References: S.L. 2016-94, sec. 36.1A

---

<sup>4</sup> The number of hours worked per week is based upon a regularly scheduled work week.

<sup>5</sup> The number of hours worked per week is based upon a regularly scheduled work week.



# Attachment 1

## List of Ineligible Positions

- Cabinet Staff<sup>6</sup>
- Principals
- Assistant Principals
- Directors
- Assistant Directors
- Supervisors, Managers, Specialists, Coordinators, Attorneys and any others with management or supervisory authority
- Educators<sup>7</sup>

---

<sup>6</sup> Cabinet Staff includes the Superintendent, Deputy Superintendent, Assistant Superintendent, Interim Assistant Superintendent, General Counsel, Chief Communications Officer and Chief Finance Officer.

<sup>7</sup> According to North Carolina Session Law 2016-94, section 36.1A, educators (certified teachers and instructional support) are not eligible for this one-time Merit Bonus.

## **Vance County Schools Merit-Based Bonus Pay Plan – Non-Certified Staff**

The following is the proposed plan for distribution of the 2016 State Merit Based Bonus for Non-Educators per the 2016 Appropriations Act – Section 36.1A.

The following were the criteria set-forth per the statute:

The bonuses shall:

- Be distributed based on a locally approved plan
- Not be distributed across the board
- Not be paid to certified teachers or instructional support
- State funds can be used to pay state funded personnel only

Our district formed a task force comprised of representatives of the groups designated to participate in the merit-bonus plan: Teacher Assistants, Bus Drivers, Maintenance, IT Technicians, Child Nutrition, Custodial, Office Support, School Technical (Treasurers, PowerSchool Technicians), and Central Office Support.

The group met 4 times over the past two months to craft the proposed plan for the Board of Education's consideration. We began with a brain storming session of all elements that the group could be evaluated for merit and then slowly narrowed down the focus to a few key elements that the group felt would isolate those that are consistently top-tier performers.

Given the limited resources provided for the bonus and the stipulation that the funds NOT be distributed across the board the group felt strongly that our plan should do it's best to identify and reward the top 5-10% of staff in these categories so that the amount of the bonus they receive would have meaning.

There is an estimated 490 staff potentially eligible for this bonus in our district.

The overall goal of the plan is to award to the top 5% a bonus of \$1000 and the group between 6-10% a bonus of \$750.

This is currently a one-year NON-RECURRING bonus per the current state budget.

## Vance County Schools Merit Based Bonus for Non-Educators – Plan

The following is the proposed Vance County Schools (VCS) plan:

### Basic Eligibility Requirements

- Non-certified staff only and ALL eligible groups will garner part of merit pay.
- Assistant Directors and above are not eligible since considered part of leadership (111, 112, 113, 115, 118 object codes).
- Must have been a VCS employee with greater than 1 year of service (employed on or before September 1, 2015).
- Primary/Main assignment is the basis for the merit plan consideration.
- Any employee with a break-in service after September 1, 2015 to present is not eligible.
- Leave of absences are allowed if approved and employee has met the greater than 1 year of service requirement.
- Permanent Part-Time staff (at least 20 hours a week) is eligible and bonus would be pro-rated accordingly.
- Any employee on a disciplinary or corrective action plan is not eligible.
- Must be currently employed at time bonus is being awarded to receive the bonus (currently employed and with no resignation on file).
  - *Time of payment is proposed to be February 2017.*

### Eligibility Criteria – Merit Level #1

- Employee must score 24 or above on the Supervisor Survey to make it to the 2nd level and rubric evaluation instrument. *(Note: CN Staffs' score from evaluation instrument is used in place of the supervisor survey).*
  - Survey had 6 questions to help discern the top tier performers.
  - Group wanted the cut-off to be high enough that final group being evaluated would be manageable and the final rubric would identify the top 10% of the highest performing staff.

### Primary Supervisor Survey Questions:

- Based on Last Year's Performance and Data
  - Scale of 1 to 5 (5 being best)
  - Total Points – 1 for 1, 2 for 2, etc. 5 for 5
    - Max points 30
1. How would you rate this employee's Tardiness/ Attendance?
    - a. *Tardiness needs to be routine and consistently 15 minutes or more.*
    - b. *Attendance concerns would show a pattern and frequency.*
  2. How would you rate this employee's quality of data submitted, ability to meet deadlines, provide reports, etc.?
  3. How would you rate this employee's efforts toward collaboration, providing solutions and working towards the benefit for the school and students?
    - a. Include comment box – for examples of collaborative efforts/ flexibility.
  4. How would you rate this employee's flexibility and ability to support/back-up others in the school/office?
  5. How would you rate this employee's professionalism and positive attitude?
  6. **How would you rate this employee as a team player?**
    - a. **The score for this question will help summarize #'s 3, 4 & 5 and is then also being used in the rubric separately.**

*Secondary Survey with same questions # 2-6, sent for the following (Bookkeepers and PowerSchool) for use in the rubric for final evaluation:*

**Eligibility Criteria – Cut Level #2**

- Each Employee group of staff would be evaluated in the rubric below.
- The top 10% and top 5% would be identified regardless of score and awarded a bonus.
- Groups are: Bus Drivers/Bus Monitors, Child Nutrition, Maintenance/Transportation Support, Custodians, Teacher Assistants, Office Support/Technical (includes, Administrative Support, Bookkeepers, PowerSchool, IT Techs, Central Services).

**Merit Plan Rubric Elements:****1. VCS Years' Experience – Rubric Results**

VCS Years of Experience ONLY

- Cumulative experience so even if previous break-in service would count towards total VCS experience for each employment period.*

Years of VCS Service	Points towards Weighting
1 – 5 years	5 points
6 – 9 years	7 points
10-14 years	13 points
15 -19 years	20 points
20-24 years	25 points
25 + years	30 points

- Student Growth** of School Assigned or District Growth if Central Services.
  - 5 points if met growth or below*
  - 10 points if exceeded growth*
- Supervisor Survey Score (see Eligibility #1), CN Staff Evaluation score, or Bookkeepers/PowerSchool staff average score of primary and secondary surveys.**
- Question #6 – Team Work** – results from Supervisor survey
  - Group feels strongly that those results will show best the “MERIT” aspect of the plan so extra weighting will be assigned this area.
- Group Specific Quantifiable element** – (not for TA’s or Office Support)
  - Custodial staff – cleanliness report results
  - Maintenance staff work order completion rates.
  - Bus drivers – incident reports.

Rubric Criteria	Weighting – TA, IT, CN & Office Support	Weighting – All other Classified
VCS Years' Experience	20%	10%
Student/District Growth	10%	5%
Primary Survey Points	45%	45%
Team Player Question Points	25%	25%
2 <sup>nd</sup> Level of Data – selected	0 – N/A	15%

State Funded Merit Based Bonus for Non-Educators – Wake County Public School System

The North Carolina General Assembly’s Appropriation Act, titled House Bill 1030, provides funding to State Agencies for provision of a one-time merit-based bonus to non-educators.

**Specific provisions of the legislation**

- It cannot be an across the board bonus,
- It can only be paid to state funded employees,
- The bonus can be used for school based administrators, central office, and non-certified personnel,
- The bonus cannot be used for educators or others paid on the teacher salary schedules,
- The bonus is not eligible towards retirement, and
- Each Board of Education must report to the NC Department of Public Instruction its plan for the bonus

**Recommendation Approved by the Board of Education**

- WCPSS employees paid on Salary Grade 16 through Salary Grade 30, and the Bus Driver/Team Lead Schedule are eligible. These Schedules can be found on page 34 through page 50 of the published WCPSS 2016-17 Salary Schedule ([link](#)). No other positions are eligible for this bonus.
- The State Legislation limits the one-time merit based bonus to State funded employees. WCPSS will provide the same bonus to Non-State funded employees that would otherwise be eligible for consideration of the bonus if they were State-Funded. Non-State funding sources have been reserved for this.
- Employees eligible for the one-time merit-based bonus must be performing satisfactorily to qualify for the bonus. Specifically employees that are under a conditional evaluation work-plan at the time of bonus payment (January 2017) do not qualify for the bonus. In addition employees that received a rating of Needs Improvement or Unsatisfactory on any component of the 2015-16 employee evaluation do not qualify for the bonus.
- Permanent full-time and permanent part-time employees are eligible. Temporary employees, whether full-time or part-time, are not eligible.
- To be eligible, the employee must be employed with WCPSS on December 31, 2015 and remain employed at the time of the bonus payment.
- Eligible permanent full-time employees qualifying for the one-time merit-based bonus will receive a bonus based upon the following schedule. Eligible permanent part-time employees qualifying for the one-time merit-based bonus will receive a pro-rated amount.

**Grade 16 through Grade 30 and Bus Driver/Team Leader Schedule**

<b>Steps 1 thru 9</b>	
Bonus Amount	\$ 350.00
<b>Steps 10 thru 14</b>	
Bonus Amount	\$ 425.00
<b>Steps 15 thru 19</b>	
Bonus Amount	\$ 500.00
<b>Steps 20 thru 24</b>	
Bonus Amount	\$ 575.00
<b>Steps 25 plus</b>	
Bonus Amount	\$ 650.00

**House Bill 1030**

**STATE-FUNDED PERSONNEL/MERIT-BASED BONUSES AUTHORIZED**

SECTION 36.1A.(a) Funds for Merit-Based Bonuses. – Of the funds appropriated in this act from the General Fund and Highway Fund to the Compensation Bonus Reserves, nonrecurring funds for the 2016-2017 fiscal year are authorized generally to provide employing agencies with funds to award one-time merit-based bonuses to State-funded personnel in accordance with eligibility policies adopted by the employing agencies. The eligibility policy shall not provide an across-the-board bonus for this purpose. Notwithstanding G.S. 135-1(7a) and G.S. 135-53(5), merit-based bonuses awarded under this Part are not compensation under Chapter 135 of the General Statutes.

SECTION 36.1A.(b) Employing Agency. – For the purposes of this Part, "employing agency" includes the following entities employing State-funded personnel:

- (1) The State Human Resources Commission, for executive branch departments with respect to both EHRA and SHRA employees, except University of North Carolina EHRA employees.
- (2) The Administrative Office of the Courts and the Commission on Indigent Defense Services, for the judicial branch.
- (3) The Legislative Services Commission, for the legislative branch.
- (4) The Board of Governors of The University of North Carolina, except as to its SHRA employees.
- (5) The State Board of Community Colleges, for the North Carolina Community College System.
- (6) Each local board of education, for school-based administrators, central office, and noncertified personnel. Educators are not eligible.

SECTION 36.1A.(c) Reporting. – Each local board of education shall provide to the Department of Public Instruction (DPI) the details of how these funds are distributed by district and school. All other employing agencies, and DPI, shall report to the chairs of the Senate Appropriations/Base Budget Committee and the House of Representatives Committee on Appropriations and the Fiscal Research Division on the use of these funds by no later than February 1, 2017.



## 2016-17 Merit Pay Bonus Allocation for Non-Educators

### Background

The 2016 General Assembly ratified on July 14, 2016, HB 1030 (Session Law 2016-194), and signed into law by Governor Pat McCrory, provides funding for a one-time lump sum merit-based bonus for non-educators. Merit based bonuses are for non-educators, including school based administrators, central office and non-certified personnel. Educators (teachers and instructional support personnel paid on the teacher salary schedules) are **not** eligible. LEAs shall provide to DPI details of how these funds are distributed by district and school. The State Board of Education approved funding by local education agencies (LEAs) in August 2016. Warren County Schools received an allocation of **\$43,645.00** out of \$17,242,627 for the 2016-2017 school year.

### Legislated Restrictions

LEAs shall adhere to the following per the legislation:

- Require the local board to adopt a policy (plan) as to how to award the bonuses
- Shall not pay the bonus as an across the board bonus
- Only state funded personnel are eligible for a bonus from the State funds
- Bonus is not subject to retirement
- Bonus is one-time payment (non recurring)

### Warren County Schools Proposal

#### Position Requirements

- **Position Categories:** Eligible position categories for the merit-based bonuses are all classified non-educators, including teacher assistants, bus drivers, office support personnel, custodians, maintenance, technology, transportation, and child nutrition. Any position not explicitly included in the above list identified as potentially eligible for the merit-based bonuses may be reviewed by Senior Leadership to determine eligibility.
- **Terms of Service:** The employee must have been employed in an eligible position on January 15, 2016 and remain employed with Warren County Schools, without a break in service, through May 1, 2017. Individuals must be employed in a permanent part-time or full-time position, working at least 20 hours or more in the eligible position category to be considered for the part time bonus and 30 hours or more for the full-time bonus.
- **Excluded Position Categories:** Central Office Administrators are excluded from eligibility for merit-based bonuses. Teachers and instructional personnel paid on the teacher salary schedule are not eligible for merit-based bonuses pursuant to the North Carolina Session Law 2016-94.

**Special Conditions**

- **Leaves of Absences:** Employees on a leave of absence for short-term disability must have worked at least six months in the 2015-2016 school year and must have an evaluation completed by their supervisor either prior to or upon their return. All requirements must be met and bonuses paid prior to the end of the 2016-2017 fiscal year.
- **Separations:** Employees who separate from Warren County Schools prior to May 1, 2017 are not eligible for the merit-based bonus pay.

**Criteria for Eligibility**

- Longevity
- Evaluation Performance as determined by the 2016-17 evaluations.
- Disciplinary Actions - No disciplinary action plans or letters can be on file (in Human Resources or with the school/department) from July 1, 2015 until May 1, 2017.

Points will be awarded in the each of the aforementioned criteria to eligible employees. The table below illustrates how points will be awarded.

Criteria	Points			Total Points
	1	2	3	
Longevity		1 to 12 years of service with WCS	13+ years of service with WCS	
Performance Evaluations		Meets Standards or above on at least 7 of the thirteen evaluation standards	Meets Standards or above on at least 9 of the thirteen evaluation standards	
Disciplinary Actions  (Must not have any reprimand letters during the 2016-17 school year)			No letters of reprimand in personnel file during the 2016-2017 school year	

Based on the allotted dollar amount for WCS, each eligible employee has the potential to earn \$260. There are 168 eligible employees. The total allotted of **\$43,645.00** divided by 168 equals \$260.



Funds will be distributed based on the following point system:

9 points = 100% = \$260	6 points = 67% = \$174
8 points = 89% = \$231	5 points = 56% = \$145
7 points = 78% = \$202	4 points = 44% = \$114

### **Proposed Timeline of Distribution**

#### **December 2016**

- Human resources identifies eligible employees and distribute rubric to immediate supervisors for verification.
- Presentation to the Board of Education for review, discussion and approval of Merit Pay Bonus Plan.

#### **January 2017**

- Human Resources will meet with Administrators and Dept. Heads to present final plan to school staff.

#### **April 2017**

- Immediate supervisors will make final verification and recommend to the superintendent for final review and approval. Information will be forward to the finance department for payroll processing for June payroll.

**Payment to Employees: Anticipated May 31, 2017 but no later June 30, 2017**

*Warren County Schools' Board of Education approved this plan Tuesday, December 13, 2016.*

## Washington County Schools

802 Washington Street, Plymouth NC 27962

252-793-5171 252-793-5062 (fax)

### WCS Non-Educator Merit bonus pay 2016 Proposal

North Carolina General Assembly appropriated \$39, 501 to Washington County Schools to be distributed as non-educator merit bonus pay to eligible employees.

Per the legislation,

- o Non-recurring funds for the 2016-2017 fiscal year-- \$39,501 for WCS
- o Local Board of Education must approve the plan
- o Does NOT include teachers and instructional support
- o Shall not be across the board bonus
- o Only for State funded personnel
- o Not subject to retirement but is subject to social security
- o LEA must provide data and/or narrative of the distribution (or plans) by classification and school to DPI by Dec 2016

WCS values the role each employee plays in the operation of our school system. It is through the collective efforts of everyone that we are able to meet the needs of our students on a daily basis. As defined by the criteria of the legislation, eligible employees include all state funded school administrators, central office personnel, teacher assistants, clerical staff, maintenance, transportation, child nutrition and non-certified staff. WCS Senior Staff members have voluntarily excluded themselves from receiving the bonus. A focus group comprised of a representative from each eligible category met to discuss criteria and made the following eligibility criteria recommendation.

<b>Criteria</b>	<b>1</b>	<b>3</b>	<b>5</b>
<b>Longevity</b>	1 year or less of employment with WCS	More than one year but less than 10 years of employment with WCS	10 years or more of employment with WCS
<b>Reprimands</b>	---	---	No reprimands during the 2015-2016 fiscal year
<b>Attendance (does not include professional development)</b>	Missed more than 10 days	Missed 5-10 days	Missed less than 5 days
<b>Merit bonus award</b>	Less than 11 pts = \$600	11-14 pts = \$400	15+ pts = \$355

(Note—Bonus award amounts are for demonstration purposes only. Actual amounts will depend on number of eligible employees.)

## **Washington County Schools**

802 Washington Street, Plymouth NC 27962  
252-793-5171 252-793-5062 (fax)

### **\*\*\*\*Special criteria\*\*\*\***

Eligible employees must be employed as of January 1, 2016 and must remain employed with WCS during the 2016-2017 school year. The merit-based bonus does not apply to employees separated from State service prior to the last day of the pay period in which payment is disbursed. Eligibility is based on employee classification and status at the time funds are disbursed. Qualifying part time employees will be paid a pro-rated amount of the bonus.

### **Proposed timeline for distribution**

- Eligible employees will be identified and submitted to supervisors by October 31, 2016.
- Supervisors will use the rubric to rate each employee according to the identified criteria and submit to Chief Personnel Officer by December 1, 2016.
- Chief Personnel Officer will review each list and compile a final list of eligible employees and amount of each bonus. This list will be submitted to the Finance Officer by January 20, 2017.
- Bonuses will be distributed in the February 2017 pay cycle.

## MERIT-BASED BONUSES

---

The Watauga County Board of Education will award one-time merit-based bonuses to eligible employees in December, 2016 in accordance with the plan outlined here and North Carolina Session Law 2016-94, section 36.1A.<sup>1</sup> To be consistent with law, the allocation of these one-time bonuses will not be across-the-board.<sup>2</sup> The amount of bonus awarded will not be added to the employee's ongoing base salary and will not be considered compensation for retirement purposes.<sup>3</sup>

### A. ELIGIBILITY<sup>4</sup>

To be eligible for a one-time merit-based bonus, an employee must meet the requirements established below.

#### 1. Position Requirements

##### **Employee Classification**

Employees who are non-exempt from the Fair Labor Standards Act (FLSA) would be eligible.

##### **Employment Term**

- Employees who worked with Watauga County Schools during the period from July 1, 2015 – June 30, 2016 would be eligible.
- Employees must have worked at least six (6) months during the 2015-2016 school year and have been employed since January 1, 2016 would be eligible.

##### **Current Employment**

Employee must be a current employee with Watauga County Schools at the time of the merit-based bonus payment in December 2016.

---

<sup>1</sup> S.L. 2016-94, sec. 36.1A, provides funding in the 2016-17 state budget for one-time merit-based bonuses to be given to state-funded school-based administrators, central office, and noncertified personnel. No funds are provided by the state for locally-paid employees, although the board could fund merit bonuses for locally-paid employees from local funds. Educators (certified teachers and instructional support) are not eligible for the bonus. The legislation does not establish a deadline for distribution of the bonus; school officials should consult DPI for appropriate guidance.

<sup>2</sup> Across-the board bonuses are not permitted. See S.L. 2016-94, sec. 36.1A.

<sup>3</sup> See S.L. 2016-94, sect. 36.1A(a).

<sup>4</sup> DPI issued guidance to LEA in a memo from Phillip Price sent via email to finance officers on September 14, 2016. (As of this writing, the memo is not publicly available) The memo indicates that local "policies" must clearly outline eligibility requirements; amount(s) to award; payment date; and special conditions related to breaks in service, employees transferring between LEAs, leave of absence, and separation. A subsequent memo from DPI issued to finance officers on September 23, 2016, clarified that a formal board policy is not necessary and that a board-approved "plan" is sufficient. Details of the local plan or policy must be submitted by December 20, 2016, to the Division of School Business at DPI.

---

---

### **New Hires**

Employees hired on or before January 1, 2016 and who have a summative evaluation rating of “meets” or “exceeds” expectations are eligible.

### **Transfers**

- Employees who have transferred from a position within Watauga County Schools to another position within Watauga County Schools and meet the other eligibility requirements would be eligible for the merit-based bonus pay.
- Employees who have transferred out of Watauga County Schools and are no longer employed with the district at the time of payment in December 2016 are not eligible.
- Employees who have transferred into Watauga County Schools and were not employed for at least six (6) months with Watauga County Schools during the 2015-2016 school year are not eligible.

### **Leave of Absence**

- Employees on Leave of Absence must have at least six (6) months of cumulative work from the 2015-2016 school year and a summative evaluation rating of “meets” or “exceeds” expectations to be eligible. If an employee was on Leave of Absence at the end of the 2015-2016 school year, his/her supervisor must provide a performance evaluation upon the employee’s from the Leave of Absence during the 2016-2017 school year.
- Employees who worked at least six (6) cumulative months during the 2015-2016 school year and are currently on Leave of Absence are eligible if they return to work during the 2016-2017 school year. Employees on Leave of Absence who return to work prior to December 2016 and meet the other eligibility requirements, would receive the merit-based bonus in December 2016.
- Employees who are on Leave of Absence in December 2016 and return to work prior to the end of the 2016-2017 school year and meet the other eligibility requirements, would be paid the merit-based bonus upon their return to work. Funds will be set aside to pay the merit-based bonuses for these employees.
- Employees who are on Leave of Absence in December 2016 and do not return to work prior to the end of the 2016-2017 school year would not be eligible for the merit-based bonus.

### **Break in Service**

Employees who separate from Watauga County Schools with a break in service, are not eligible.

### **Separations**

The merit-based bonus does not apply to employees separated from Watauga County

---

Schools' service prior to the last day of the pay period in which the payment is disbursed.

**Eligible employee classifications include:**

Teacher Assistants  
Clerical/Office Support  
Child Nutrition  
Maintenance  
Mechanics  
Custodians  
Bus Drivers  
Bus Monitors  
Technology  
After School

**Source of Funding**

- Employees paid from state fund sources who meet the qualifications for merit pay will be paid from the state allotments for merit pay.
- Employees paid from local fund sources who meet the qualifications for merit pay will be paid from local Watauga County School funds.

2. Performance Requirements

**Performance**

Employees with a summative evaluation at the end of the 2015-2016 school year with all indicators rated “meets” or “exceeds” expectations are eligible.  
Employees must have at least six (6) months of cumulative employment to be eligible to receive a performance evaluation rating.

**Disciplinary Actions**

Employees with any negative personnel action documented in their personnel file from July 1, 2015 to June 30, 2016 would not be eligible.

---

---

**B. AMOUNT OF BONUS**

The superintendent shall ensure that the total amount of funds awarded do not exceed the amount of funds provided by the state for the purpose of providing merit-based bonuses. Bonuses shall be allocated as follows:

Full-time employees who worked the full school year (10 months or 12 months depending on the position) and met the qualifications for merit pay will receive \$600.

**Prorated Payments**

- Employees who worked less than ten (10) months would receive a prorated merit-based bonus payment. For example, an employee who worked 6 months of a 10 month term would receive 60% of the full amount.
- Employees who worked in part-time positions (less than 100% employed) would receive a prorated merit-based bonus payment. For example, an employee who worked in a 20 hour per week position would receive 50% of the full amount.

# **WAYNE COUNTY PUBLIC SCHOOLS**

## **MERIT-BASED BONUSES**

---

### **Introduction:**

The NC State Board approved allocations to each LEA to pay non-educators a merit based bonus. Section 36.A1 of Session Law 2016-94 requires each LEA to develop a Board approved plan that determines the distribution of the bonuses based on merit.

The legislation specifically states that:

- The distribution is determined from a locally approved plan
- Non-educators only are eligible e.g. excludes teachers and instructional support
- The payout shall not be distributed across the board
- The allocation is for State funded personnel only
- The payout is not subject to retirement but is subject to social security
- Approved plan must be communication to DPI by December 1, 2016.

### **Bonus Criteria**

To qualify for merit-based bonus, an employee must meet the requirements established below.

- Must be a non-educator, as restricted by the Merit Based Bonus legislation included in NC Session Law 2016-94. Non-educator is defined as employees other than teachers and instructional support personnel paid on the teacher salary schedule.
- The pool of personnel who qualifies for merit pay is limited to Assistant Principals and/or employees with annual earnings of \$50,000 or less.
- Must have been employed as of June 30, 2016 and remain continuously employed until bonus payout.
- Full time and part time employees are eligible. Merit payout will be prorated based on the percent the individual is employed.
- Must not have been placed on any type of improvement plan since July 1, 2015.
- Must receive an overall rating of “Above Standard” or “At Standard” based upon and supported by the November 2016 employee evaluation.

### **Bonus Payout**

- The bonus amount will be determined after all qualified employees have been identified from the rating process.
- Bonus payout will be made December 20, 2016.





Superintendent  
D. Mark Byrd, Ed. S.

Associate Superintendent  
Anna R. Lankford, MA

## Wilkes County Schools Merit Bonus Pay Plan

### **Background**

Section 36.1A of House Bill 1030 included funding for merit based bonus pay for public school non-educators. The bonus is a one-time, non-recurring payment not subject to retirement. The bonus cannot be an across the board bonus, but must be based on a form of merit. Only state funded employees are eligible for the bonus pay. The plan must be school board approved and submitted to the Division of School Business by December 20, 2016.

### **Eligibility**

Categories of eligible employees will include teacher assistants, custodians, bus drivers, and qualifying assistant principals. Eligible assistant principals include those individuals who are currently not receiving Master's degree pay on the certified teacher salary scale as outlined in section 8.3 of Senate Bill 744/Session Law 2014-100. Full and part-time permanent employees will be eligible if employed as of September 1, 2015. Employees on an approved leave of absence will be eligible. Employees on an approved leave of absence without pay are not eligible. If an eligible employee separates employment prior to December 16<sup>th</sup> they will not receive bonus pay.

### **Bonus Distribution**

Eligible employees will receive merit bonus pay in the month of December, 2016.

### **Determination of Merit Bonus Pay Amounts**

A criteria matrix will be used to rate eligible employees from each category.

Teacher assistants, custodians, and bus drivers will be rated on two criteria that include duration of service and performance. Duration of service is defined as the amount of qualifying service time. Performance will be measured by documentation related to demotion, suspension, disciplinary action, complaint, or suggestion for improvement that has been placed in an employee's district level personnel file during the 2015-2016 school year.

Qualifying assistant principals will be rated on two criteria that include performance and evaluation. Performance will be measured by documentation related to demotion, suspension, disciplinary action, complaint, or suggestion for improvement that was placed in an employee's district level personnel file during the 2015-16 school year. Evaluation will be rated by the proficiency of standards as measured by the 2015-16 North Carolina Educator Effectiveness System evaluation records of assistant principals.

**Allotment**

Wilkes County Schools has been allotted \$136,548 by the North Carolina Department of Public Instruction for merit bonus pay. A sub allotment has been assigned to each category of eligible employees. Once a criteria matrix has been completed on each eligible employee, points will be totaled, and a dollar amount assigned to a single point value. Employees will be paid based on total points awarded. Part-time permanent employees will receive pro-rated bonus pay. This method will ensure that the entire bonus pay allotment has been used appropriately.

**Matrix**

Bus drivers, teacher assistants, custodians

Duration of Service	20+ Years of Service	11-19 Years of Service	1-10 Years of Service
Points	3	2	1
2015-16 Performance	No identified documentation related to demotion, suspension, disciplinary action, complaint, or suggestion for improvement have been placed in the district personnel file.		
Points	1 Point		
<b>Total Points</b>			

Assistant Principal

2015-16 NCEES Evaluation	Proficient or greater on all 5 evaluation standards (yes)	Proficient or greater on all 5 evaluation standards (no)
Points	1	0
2015-16 Performance	No identified documentation related to demotion, suspension, disciplinary action, complaint, or suggestion for improvement have been placed in the district personnel file.	
Points	1 Point	
<b>Total Points</b>		

  
 Superintendent 12/6/16  
 Date

  
 Board of Education Chair 12/5/16  
 Date

# Wilson County Merit Based Bonus Proposal

The board will award one-time merit-based bonuses to eligible employees in April, 2017 in accordance with the plan outlined here and North Carolina Session Law 2016-94, section 36.1A. To be consistent with law, the allocation of these one-time bonuses will not be across-the-board. The amount of bonus awarded will not be added to the employee's ongoing base salary and will not be considered compensation for retirement purposes.

**A. ELIGIBILITY**

To be eligible for a one-time merit-based bonus, an employee must meet the requirements established below.

1. Position Requirements - the following pool of employees will be potentially eligible for the merit-based bonuses:

- School and Central Office Clerical Support
- Custodians
- Teacher Assistants
- Bus Drivers
- Bus Garage Workers

2. Disqualification - employees from the eligible pool, for whom any of the following conditions are true, will not be eligible for the bonus:

- A break in service during the 2016-2017 school year
- Employed with the district but on leave of absence
- Employees transferring from another LEA after December 2016
- Employees that separated employment with the district prior to April 2017
- New employees that are hired after January 1, 2017

3. Performance Requirements

Employees that receive an 'Above Average' or 'Outstanding' on their 2016-2017 performance evaluation will be awarded the merit-based bonus.

**B. AMOUNT OF BONUS**

The superintendent shall ensure that the total amount of funds awarded do not exceed the amount of funds provided by the state for the purpose of providing merit-based bonuses. Bonuses shall be allocated as follows:

- Outstanding: A minimum of \$427\*
- Above Average: A minimum of \$300\*

*\*Adjustments will be made based on the total number of eligible employees that meet the performance requirements.*

**C. POLICY SUNSET**

This policy is effective for the 2016-17 school year only unless the board takes further action to continue it in effect.

Legal References: S.L. 2016-94, sec. 36.1A

Adopted: November 14, 2016

## **YADKIN COUNTY SCHOOLS MERIT-BASED BONUSES**

---

The board will award one-time merit-based bonuses to eligible employees in February, 2017 in accordance with the plan outlined here and North Carolina Session Law 2016-94, section 36.1A. To be consistent with law, the allocation of these one-time bonuses will not be across-the-board. The amount of bonus awarded will not be added to the employee's ongoing base salary and will not be considered compensation for retirement purposes.

### **A. ELIGIBILITY**

To be eligible for a one-time merit-based bonus, an employee must meet the requirements established below.

#### **1. Position Requirements**

Positions chosen as eligible for the merit-based bonus are the classified positions of Teacher Assistants, Custodians, and Bus Drivers.

#### **2. Performance Requirements**

Employees eligible to receive the merit-based bonus must meet certain performance requirements. All employees in the eligible categories will be measured on a Merit Pay Matrix (see attached) and will receive ratings in two areas. Employees are rated based on their longevity with Yadkin County Schools as of August 31, 2016. Ratings are given for employees with 20 or more years of continuous service, 10 to 19 years of continuous service, and 1 to 9 years of continuous service. All eligible employees must have been employed with Yadkin County Schools as of September 1, 2015.

Employees are also rated based on their performance evaluation ratings for the 2015-2016 school year. Employee's ratings are divided into 3 categories. These categories are those who scored at the above standard or well above standard on all evaluation categories, those who scored at standard on all evaluation categories, and those who scored below standard in any category.

Employees will be ineligible for the merit-based bonus if they have any formally documented reprimands, action plans, or disciplinary actions taken within the past two (2) school years.


### **B. AMOUNT OF BONUS**

The superintendent shall ensure that the total amount of funds awarded do not exceed the amount of funds provided by the state for the purpose of providing merit-based bonuses.


---

Bonuses shall be allocated as follows:

Those employees rating at a level four (4), five (5), or six (6) on the Merit Pay Matrix and having no formally documented performance concerns (as noted under the previous section) will receive an allotment equal to the employees' percentage of employment from the total amount allocated to the district from the state.

  
Board of Education Chairman

12-5-2016  
Date

  
Superintendent

12-5-16  
Date

## Merit Pay Matrix

Employee Name: \_\_\_\_\_

Position(s): \_\_\_\_\_ Site: \_\_\_\_\_

Criteria	2015-2016 Academic Year		
<b>Longevity</b>	20+ years of service as of 8/31/16	10-19 years of service as of 8/31/16	1-9 years of service as of 8/31/16
<b>Score</b>	3 points	2 points	1 point
<b>2015—2016 Evaluation Ratings</b>	Rating of 1 in at least 5 areas, No ratings below 2.	Ratings of 1, 2 or 3	Ratings of 4 or 5
<b>Score</b>	3 points	2 points	1 point
<b>Performance</b>	Must have NO formally documented reprimands, action plans, or disciplinary actions filed in their personnel file within the past 2 academic years through current. (2014-2015, 2015-2016) Any such documentation will disqualify the employee from receiving the bonus.		





# **YANCEY COUNTY SCHOOLS**

## ***Our Vision - Excellence***

---

### **Merit-Based Bonus for Non Educators**

House Bill 1030 SL 2016-94

Section 36.1A authorizes the local Board of Education to award one-time merit-based bonuses to State-funded non-certified personnel (bus drivers, child nutrition, clerical, custodians, maintenance, school resource officers, teacher assistants, technology assistants/technicians, and transportation). Even though the legislation included school-based administrators, central office directors and other non-certified staff, Yancey County Schools has decided to focus on non-certified personnel as indicated above for allocation of these funds. To be consistent with law, the allocation of these one-time bonuses will not be across-the-board. The amount of bonus awarded will not be added to the employee's ongoing base salary and will not be considered compensation for retirement purposes.

The local Board of Education approved the following plan to award one-time merit based bonuses. Due to the fact the legislation only provides an allocation for State-funded positions, the Board of Education hereby authorizes the use of local funds for other eligible employees defined by this plan. It is the intent of this Board to thank each of its non-certified employees regardless of their funding source.

#### **A. ELIGIBILITY**

To be eligible for a one-time merit-based bonus, an employee must meet the requirements established below:

1. Position Requirements
  - a. Non-certified employees in permanent (full-time/part-time) position.
  - b. Must be employed as of February 1, 2017.
  - c. Original employment date in a permanent position on or before January 4, 2016.
  - d. Must have been evaluated during the 2015-2016 school year.
  - e. Bonuses for part-time employees will be a half of the allocated share.
2. Special Conditions
  - a. Employees serving in a dual capacity are not eligible for consideration in both positions. Consideration will be based upon their primary position and the performance evaluation in that position. However, hours of employment in both positions will be used in making the eligibility determination.
  - b. Employees on an approved leave of absence for more than six months during 2015-2016 school year will not be awarded the merit bonus.
  - c. Employees with active written reprimands or action plans dated July 1, 2015 and forward are not eligible for the merit-based bonus.

B. CRITERIA FOR AWARDING BONUSES

1. YCS Merit Award Rubric Chart for Non-Certified Staff

Category	3 Points	2 Points	1 Point
Longevity (Years of Experience with YCS)	20+	10-19	0-9
Evaluation 2015-2016 Summative Evaluation Rating	Exceeds Expectations	Meets Expectations	Needs Improvement

C. AMOUNT OF BONUS AND PAYMENT DATE

- The superintendent shall ensure that the total amount of funds awarded do not exceed the amount of funds provided by the state for the purpose of providing merit-based bonuses. Bonuses shall be allocated as follows:

Bus Drivers, Child Nutrition, Clerical, Custodians, Maintenance, School Resource Officers, Teacher Assistants, Technology, and Transportation employees may earn a total of 6 points.

2-3 Points = \$300.00\*    4 Points = \$400.00\*    5-6 Points = \$500.00\*

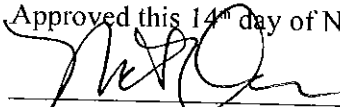
\*Note: The exact bonus amount and payout is subject to applicable funding and could be modified by Board action. The amount allotted could change as we approach the February payout date.

- The one-time merit bonus will be paid to eligible employees in February 2017.


D. LEGISLATED RESTRICTIONS

- Requires the local board to adopt a plan outlining how the bonuses will be awarded.
- Shall not pay the bonus as an across the board bonus.
- Only State funded personnel are eligible for a bonus from the State funds.
- Bonus is not subject to retirement.
- Bonus is one-time payment (non-recurring).
- Educators are not eligible. Any teacher or instructional support personnel who is paid from the certified education salary schedule is not eligible. This includes, but not limited to: teachers, school counselors, psychologist, nurses, audiologists, speech language pathologists, media coordinators, social workers, etc.

Approved this 14<sup>th</sup> day of November 2016.

  
Mr. Mike Orr, Board Chair

11-14-16  
Date

  
Dr. Jony Tipton, Superintendent

11-14-16  
Date



**Yancey County Schools**

OUR VISION – EXCELLENCE 100 School Circle P.O. Box 190 Burnsville, NC 28714 Ph: (828)682-6101 Fax (828)682-7110

**MERIT PAY Qualifying Template**

Employee Name \_\_\_\_\_ Assigned School(s) \_\_\_\_\_

Job Title (list Primary Role only if hired for multiple positions) \_\_\_\_\_

**Section I – Meeting Qualification Requirements for Eligibility**

- A.) Was the employee hired in a non-certified permanent position for 2015-16? Y N  
 (If “no”, then employee is Not Eligible)  
 (If “yes”, then continue below)
  - 1.) Was the position full-time or part-time? FT PT
  - 2.) Was the employee also hired for an additional position (dual roles)? Y N
    - a.) if yes, did the combined number of hours for both roles exceed 29.5 hours/week? Y N  
 (If “yes”, then the employee is Full-Time; continue below)
- B.) Was the employee’s hire date for this position on or before January 4, 2016? Y N  
 (If “no”, then employee is Not Eligible)  
 (If “yes”, then continue below)
- C.) Was the employee evaluated during the 2015-16 year? Y N  
 (If “no”, then immediately evaluate the employee)  
 (If “yes”, then continue below)
- D.) Was the employee on an approved Leave of Absence for more than six months during the 2015-16 school year? Y N  
 (If “yes”, then the employee is Not Eligible)  
 (If “no”, then continue below)
- E.) Did the employee have any active Written Reprimands or Action Plans dated July 1, 2015 and forward? Y N  
 (If “yes”, then the employee is Not Eligible)  
 (If “no”, then continue below)

Summary of Eligibility (circle determination below)		
Eligible		Not Eligible
Full-Time Share	Part-Time Share	

\$ \_\_\_\_\_ \$ \_\_\_\_\_

Amount of Share Awarded – Derived from completion YCS Merit Award Rubric (on back side)

Section II – Merit Award Share Determination

- Please circle the answer for each of the three categories of merit being used on the YCS Merit Award Rubric.

P O I N T V A L U E S			
Category	3 POINTS	2 POINTS	1 POINT
LONGEVITY (# of years of experience with YCS)	20 + years	10-19 years	0-9 years
EVALUATION (Summative Evaluation Rating for 2015-16 – as averaged across the instrument)	Exceeds Expectations	Meets Expectations	Needs Improvement

TOTAL POINTS EARNED FROM ABOVE RUBRIC \_\_\_\_\_

POINT SCALE

2-3 Points = \$300.00 (\$150.00 half share)

4 Points = \$400.00 (\$200.00 half share)

5-6 Points = \$500.00 (\$250.00 half share)

AMOUNT OF BONUS EARNED BY THE EMPLOYEE \_\_\_\_\_

---

VERIFICATION ATTESTATION

By signing below I hereby attest to the accuracy of this information based on data gathered from Yancey County Schools for the 2015-16 school year.

\_\_\_\_\_  
Signature of YCS Superintendent

\_\_\_\_\_  
Date

\_\_\_\_\_  
Initials – Carla McMahan, HR Director

\_\_\_\_\_  
Initials – Robbie Renfro, Finance Officer