

(Please note: This document needs additional information, review and editing prior to finalizing.)

CMS Proposed Alternative Compensation System

Response to House Bill 950

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Learning and Design Process

The Compensation Task Force (CTF) selected to develop Charlotte-Mecklenburg Schools' (CMS) response to HB950 utilized a two-phased methodology to create its proposal. The first phase was focused on learning and the second on the actual design of the proposed compensation system. Critical to the success of developing a viable design was the learning experience detailed below:

Phase one of this process was learning experience that provided CTF participants with a foundational knowledge of compensation to help them enter Phase Two—the design process—prepared and informed. During Phase One, participants acquired a fundamental working knowledge of varied aspects of measures, research, practices, sustainability, and examples of alternative compensation systems. They also increased their awareness of the overall environment and function of compensation in education, as well as in the non-profit and for-profit industries. Finally, these sessions examined the enabling factors of alternative compensation systems such as technology, strategy, change management, and comprehensive human capital.

Learning objectives for task force participants at the completion of Phase One were as follows:

1. Describe the various types of compensation models and explain the differences between them as well as their strengths, weaknesses, opportunities, and threats.
2. Discuss the role and importance of comprehensive human capital in strategic compensation.
3. Identify trends and best practices in educator compensation.
4. Explain how compensation practices from the private sector can inform similar efforts in education.
5. Apply research, best practices, and national trends in compensation model design and sustainability to local needs and contexts.

To achieve the learning objectives outlined, Battelle for Kids (BFK) provided task force participants with a variety of resources to create a true blended learning experience. Resources include:

- **Online Courses (6):** Self-paced learning designed to develop a foundational understanding around the history of educator compensation, the elements comprising total compensation, and key considerations for the design of compensation systems.
- **Gallery Walk:** An interactive map and profiles of compensation systems from districts around the country, outlining model components and offering contextual information (e.g., district priorities, challenges to be addressed through strategic compensation) to provide a clear understanding of districts' efforts.
- **Learning Library:** An extensive, continually updated bibliography of research publications and best practice articles that address a number of key areas related to strategic compensation.
- **Learning Sessions (3):** Face-to-face learning, including hands-on activities to help educators engage in a thoughtful compensation model design process, or simply increase their understanding of strategic compensation.
- **Webinar Archive:** Webinar recordings of districts from around the country discussing their compensation models, the design process, and lessons learned.
- **Strategic Compensation Glossary:** Glossary of key terms to develop common language and understanding to support design and communication efforts.
- **PowerPoint Presentations:** Presentation materials from strategic compensation regional meetings and other events.
- **Sample Communications Materials:** Collateral materials to provide ideas on effective ways to communicate to various stakeholders around strategic compensation.

Compensation Task Force Members

CMS' Compensation Task Force represented diverse stakeholder groups to ensure a truly collaborative design process. CTF member details are provided below:

Last Name	First	School	Group Represented	Position
Anderson	Christina	James Martin Middle	TFA	Teacher, EC General Curriculum
Bell	Lauren	Nathaniel Alexander Elementary	TEP	Teacher, 4-6
Bohlen	Gayle	STAC Pres.-South Meck High	STAC	Teacher, 7-12 Art
Clark	Ann	Deputy Superintendent	Cabinet	Deputy Superintendent
Coleman-Walker	Rashawn	Chantilly Montessori	TEP	Teacher, EC General Curriculum
Deviney	Mendy	Harding High	TEP	Teacher, EC General Curriculum
Dial	Tamara	Alexander Middle	STAC	Teacher, Middle Grades Social Studies
Frierson	Randolph	CMAE Pres.-Walton Plaza	CMAE	Coach, Early Intervention
Garcia	Alejandra	Pinewood Elementary	NLNS	NLNS Resident (Principal)
Gladden	Danielle	Bain Elementary	TEP	Teacher, K-3
Herring	Kenneth	West Charlotte High	TFA	Teacher, 9-12 Science
Hines	Samantha	Teacher in Residence	TEP	Teacher in Residence
House	Millard	COO	Cabinet	COO
Howard	Jaronica	Program Manager	HR	Program Manager
Ikoku	Wendy	Providence Spring	CTA	Literacy Facilitator, Elementary
James	Karen	Druid Hills Academy	NLNS	Teacher, Elementary Science
Kurstin	Randy	Albemarle Road Middle	Meck Ed	Teacher, Middle Grades Language
Lyde	Erlene	Harding High	CMAE	Teacher, Chemistry
Moore	Allison	Dilworth Elementary	TEP	Teacher, K-3
Norris	Reeshemah	University Meadows Elem	Meck Ed	Teacher, Preschool
Oreskovic	Steven	Randolph Middle	CTA	Teacher, Middle Grades Social Studies
Pillsbury	Michael	Randolph IB Middle	Meck Ed	Teacher, Middle Grades Math
Potter	Waltrina	Ashley Park PreK-8	NLNS/TEP	Teacher, 4-6
Pratt	Paul	Head of PLAT- Berryhill Elem	PLAT	Principal
Rocca	Pat	Compensation Manager	HR	Compensation
Schimizzi	Joanna	Butler High	Meck Ed	Teacher, Biology
Smith	Mia	Garinger High	Meck Ed	Facilitator, High School Acade
Stone	Carolyn	Northridge Middle	TFA	Teacher, Bilingual/ESL
Strawn	Kevin	East Meck	CMAE	Teacher, 9-12 Math
Wagner	Amber	Crown Point Elementary	Meck Ed	Teacher, K-3
Williams	Javonne	Joseph W. Grier	TFA	Teacher, 4-6
Wirth	Sonia	HRIS	TEP	Systems Integration Analyst
Wolford	Charlene	James Martin Middle	TEP	Dean of Students

CMS Organizational Strategy

The CTF felt that the eight goals associated with the CMS Brand Promise were extremely important to the district and should be influential in the design work. Specifically, the CTF decided that, overall, the purpose of this project was to design a compensation system that works to recruit and retain effective and highly effective teachers to increase district-wide performance. The eight goals comprising the CMS Brand Promise are as follows:

CMS Brand Promise: To provide a personalized environment of academic excellence that prepares...

Every Child. Every Day. For a Better Tomorrow.

Goal 1: Accelerate academic achievement for every child and close achievement gaps so every child graduates college- or career-ready.

Goal 2: Ensure an effective teacher in every class is led by an effective principal in every school served by quality support staff.

Goal 3: Cultivate innovative partnerships with parents, caregivers and the community to provide a sustainable system of support for every child.

Goal 4: Nurture a culture of high engagement, customer service and cultural competency.

Goal 5: Maximize performance utilizing data-informed and evidence-based decision-making.

Goal 6: Strengthen and expand educational choices for students to drive learning, creativity, innovation and entrepreneurship.

Goal 7: Increase technology access and integration to support inspired learning and teaching.

Goal 8: Communicate proactively and transparently to strengthen public trust and establish CMS as the premier K-12 district.

CMS Compensation System Objectives

The next step was to write the objectives of the new compensation system. Over four sessions, the CTF decided on the following areas of focus for the compensation system:

1. Recruit and retain effective and highly effective teachers, leaders, and staff.
2. Ensure student achievement and growth, as evidenced through multiple measures.
3. Create and maintain opportunities for leadership, engagement, and professional growth.
4. Advance a culture of professionalism and respect.

Measures of Success

To assess the progress and success of the compensation model, following is a list of measures that data should be collected around, with the resulting information reviewed annually.

Metrics
% Teacher vacancies filled within 90 days
% Administrator vacancies filled within 90 days
Average # of days to fill hard-to-staff administrator or teacher positions
Offer acceptance rate
Median teacher score on talent-based screener
Median administrator score on talent-based screener
Cost per hire
% Teachers evaluated
% Teachers evaluated on time
% Administrators evaluated
% Administrators evaluated on time
Distribution of teacher performance evaluation scores
Distribution of administrator performance evaluation scores
% Turnover of "Highly Effective" teachers
% Turnover of "Effective" teachers
% Turnover of "Ineffective" teachers
% Turnover of "Highly Effective" teachers in hard-to-staff subjects/grades
% Turnover of "Highly Effective" teachers in hard-to-staff subjects/grades
Average # of hours of quality* professional development per employee
Teacher score on employee engagement and satisfaction survey
Exit survey responses of "Highly Effective" and "Effective" teachers
% Teachers receiving "At" or "Above" EVASS value-added results

***The definition of “quality” PD must be written during the second phase of the design work.**

Comparison: Current and Proposed CMS Compensation Systems:

A comparison of the traditional single-salary schedule and CMS’s proposed strategic compensation system is illustrated below. A notation of “P” or red color coding denotes present state and “F” or green color coding denotes for future state. “Does not apply” means that the compensation dimension does not apply. “LOW”

means that the dimension has little to no importance, in the model, “MID” means some importance or existence, and “HIGH” means that the factor has a great deal of importance and existence in the model.

Dimension	Does Not Apply	LOW	MID	HIGH
Prominence of Strategic Objectives	P			F
Model Flexibility		P	F	
Competition for Best Talent		P		F
Tied to Other Human Capital Initiatives	P			F
Transparency			F	P
Focus on Traditional Hierarchy		F	P	
Financially Sustainable & Predictable			F	P
Focus on Individual Career Growth		P		F
Individual Increases/Payments				P F
Individually Controlled		P		F
Focus on Team Growth	P			F
Team-Based Increases/Payments	P			F
Focus on School Growth	P			F
School-Based Increases/Payments	P			F
Focus on Organizational Growth	P			F
Organizational Increases/Payments	P F			
Increases/Payments Based on Performance Data	P			F
Increases/Payments Based on Leadership Roles		P		F
Increases/Payments Based on Years of Experience			F	P
Increases/Payments Based on Degree Attainment			F	P
Increases/Payments Based on Specialized Training				P F
Research/Best Practice Driven	P		F	

Informing the Compensation Task Force

The following four resources influenced the work in this proposal:

1. Talent Effectiveness Project
2. North Carolina House Bill 950
3. North Carolina Professional Teaching Standards
4. Measures of Effective Teaching

CMS Talent Effectiveness Project – Instructional Work Stream Summary

The Instructional Staff work stream consists of classroom teachers, specialist teachers and other employees who interact directly with students on a daily basis. Counselors, speech therapists, facilitators and media specialists are included in this work stream. The Talent Effectiveness Project aims to reflect multiple perspectives on instructional practice and student learning to determine best practices, support collaboration and drive high-impact professional development.

Teacher Working Teams convened in October 2011, continuing the work of design groups that met throughout the 2010-2011 school year. One hundred fifty teachers from 93 schools held 191 work team meetings. They contributed collectively 3,912 hours of time. The teams reviewed research and discussed each measure as a possible element of examining teacher effectiveness at CMS, considering how measurement may contribute to professional development as well as performance management. The teams presented their recommendations to the CMS Executive Staff in April 2012.

The multiple measures of teacher performance form a package of data points to assist in conducting reliable evaluations of teacher performance and inform the best path of growth for a teacher's professional development.

Measures of teacher effectiveness reviewed include:

- **Classroom Management:** After conducting a considerable amount of research, the working team concluded a highly effective teacher must demonstrate a philosophy of strong classroom management. The team cited the Measures of Effective Teaching (MET) study and other research, indicating that student achievement tends to be higher in classes that are well-managed.

- **Content Pedagogy:** The Content Pedagogy measure is designed to assess teachers' depth of knowledge in their content areas and the level of skill they exhibit in imparting that knowledge to their students. Distinguished teachers in content pedagogy not only have extensive knowledge and skill in effective instructional practice, but also know which concepts and/or skills, and in what combination, promote maximum learning in their students.
- **Hard-to-Staff Schools and Subjects:** The team developed a list of criterion to measure whether or not a school would be defined as "hard-to-staff ". In addition, the team developed a series of criterion to establish whether a subject is should be considered "hard-to-staff."
- **Professional Consultation:** After a great amount of research, the team noted that they felt that the process of instructional observation should be expanded beyond the current mandatory principal observation process. This could allow for changes in the daily instructional schedule, resulting in more informal, reflective collaboration and coaching among fellow teachers.
- **Professional Learning Communities (PLC):** The PLC team assessed the degree to which a school promotes a collaborative environment in which all professionals are committed to advancing student learning and success.
- **Student Learning Objectives (SLO):** A Student Learning Objective is a targeted, long-term goal for advancing student learning. This data-informed process involves diagnosing and improving specific student learning needs. Due to CMS's past experience with SLO's the team felt that before SLO's were used in evaluation, standards and best practices must be designed to ensure that SLO's provide rigorous, reliable data.
- **Student Survey:** The Student Survey measure is designed to measure the degree to which teachers engage in behaviors that promote student learning, engagement, and the development of life-long learning skills. The Tripod Student Survey Project, developed by Dr. Ron Ferguson, was the instrument of choice for this workgroup.

- **Teacher Work Product:** The Teacher Work Product measure examines the quality of teacher-developed assignments and assessments. This measure will evaluate teachers' work products on four aspects of performance: Academic Rigor, Alignment to Standards, Clarity of Task, and Quality of Feedback.
- **Value-Added Model:** Value-added models are growth measures of student achievement that control for environmental factors beyond the control of teachers or schools. During this work, the State mandated that value added shall be used and considered as the State Standard VI, thus, the working team produced a guide for teachers to better understand both the meaning of and the proper use of growth data in education.

House Bill 950- PAY FOR EXCELLENCE, SECTION 7A.10. (a)

House Bill 950 states that each local board of education may develop a plan of performance pay for all licensed personnel employed by the local board. Under the performance pay plan, licensed employees should be eligible to receive pay differentials or adjustments to base salary for meeting certain performance criteria. Criteria for award of pay differentials or adjustments to base salary should include, but are not limited to, the following factors:

- (1) Annual growth in student achievement of students assigned to a teacher's classroom, when applicable.
- (2) Annual growth in student achievement of students assigned to a specific school.
- (3) Assignment of additional academic responsibilities.
- (4) Assignment to a hard-to-staff school.
- (5) Assignment to a hard-to-staff subject area.

Local boards of education who have developed a plan must submit plans to the State Board of Education no later than March 1, 2013. The State Board of Education will report on these plans and the achievement-based compensation models developed as part of the federal Race to the Top grant and will submit the report and all plans to the Fiscal Research Division, the Joint Legislative Commission on Governmental Operations, and the respective Subcommittees on Education Appropriations of the Senate and House of Representatives no later

than April 15, 2013. Members of the public may also submit plans for performance pay no later than April 15, 2013, to the Fiscal Research Division, the Joint Legislative Commission on Governmental Operations, and the respective Subcommittees on Education Appropriations of the Senate and House of Representatives.

North Carolina Professional Teaching Standards

The State of North Carolina has recently passed legislation pertaining to teacher evaluation. Currently there are 6 state standards. A teacher's overall ratings for standards 1-5 are determined at the end of the year during the Summary Evaluation Conference. The overall ratings for standards 1-5 are as follows:

- **Not Demonstrated:** Teacher did not demonstrate competence on or adequate growth toward achieving standard(s) of performance. (Note: If the "Not Demonstrated" rating is used, the Principal/Evaluator must comment about why it was used.)
- **Developing:** Teacher demonstrated adequate growth toward achieving standard(s) during the period of performance, but did not demonstrate competence on standard(s) of performance.
- **Proficient:** Teacher demonstrated basic competence on standard(s) of performance.
- **Accomplished:** Teacher exceeded basic competence on standard(s) of performance most of the time.
- **Distinguished:** Teacher consistently and significantly exceeded basic competence on standard(s) of performance.

Performance Rating For Standard 6: A teacher's rating on the sixth standard is determined by a student growth value as calculated by the statewide growth model for educator effectiveness. The student growth value places a teacher into one of three rating categories:

1. **Does not meet expected growth:** The student growth value for the teacher is lower than what was expected per the statewide growth model.
2. **Meets expected growth:** The student growth value for the teacher is what was expected per the statewide growth model.

3. **Exceeds expected growth:** The student growth value for the teacher exceeds what was expected per the statewide growth model.

An overall status for a teacher is determined once the teacher has a three-year rolling average of student growth values to populate Standard 6. There are three categories for status:

- **In Need of Improvement:** A teacher who fails to receive a rating of at least “proficient” on each of the Teacher Evaluation Standards 1-5 or receives a rating of “does not meet expected growth on Standard 6 of the Teacher Evaluation Instrument.
- **Effective:** A teacher who receives a rating of at least “proficient” on each of the Teacher Evaluation Standards 1-5 and receives a rating of at least “meets expected growth” on Standard 6 of the Teacher Evaluation Instrument.
- **Highly Effective:** A teacher who receives a rating of at least “accomplished” on each of the Teacher Evaluation Standards 1-5 and receives a rating of “exceeds expected growth” on Standard 6 of the Teacher Evaluation Instrument.

		Standards 1 – 5: North Carolina Educator Evaluation System Teacher Evaluation			
		Developing	Proficient	Accomplished	Distinguished
Standard 6 : Student Growth	<i>Does not meet expected growth</i>	In need of improvement	In need of improvement	In need of improvement	In need of improvement
	<i>Meets expected growth</i>	In need of improvement	Effective	Effective	Effective
	<i>Exceeds expected growth</i>	In need of improvement	Effective	Highly Effective	Highly Effective

Measures of Effective Teaching

The MET project is a partnership of more than 3,000 public school teachers (grades 4 through 8, as well as high school grade 9 English, Biology, and Algebra I) who voluntarily opened up their classrooms to researchers. The

study looked at value-added, classroom observation, and student surveys with the purpose of investigating what effective teaching looks like, and how it can best be measured. Participating districts included Denver Public Schools, Dallas Independent School District, Memphis Public Schools, Pittsburgh Public Schools, New York City Schools, Charlotte-Mecklenburg Schools, and Hillsborough County Public Schools.

Many well-known policy and research groups were involved in this study, including the American Institutes for Research, Educational Testing Services, National Board for Professional Teaching, National Math and Science Initiative, New Teacher Center, RAND, Teachscape, Westat, and many other organizations, as well as several universities, including the University of Chicago, Dartmouth College, Harvard University, the University of Michigan, Rutgers University, Stanford University, the University of Texas, the University of Virginia,, and others.

In January, 2013, The Bill & Melinda Gates Foundation published “Ensuring Fair and Reliable Measures of Effective Teaching,” the final report of the organization's three-year long MET project. The CTF reviewed the report and findings and looked at the comments from the American Federation of Teachers and other research groups in opposition of the work.

Following are key findings and excerpts from the final MET report:

- **Great teaching can be measured:** "The data show that we can identify groups of teachers who are more effective in helping students learn. Moreover, the magnitude of the achievement gains that teachers generated was consistent with expectations. In addition, we found that more effective teachers not only caused students to perform better on state tests, but they also caused students to score higher on other, more cognitively challenging assessments in math and English." (Pages 4 -5)
- **Teachers need meaningful feedback:** "Student perception surveys and classroom observations can provide meaningful feedback to teachers. They also can help system leaders prioritize their investments in professional development to target the biggest gaps between teachers' actual practice and the expectations for effective teaching." (Page 20)

- **Observations should be done by multiple reviewers, multiple times:** Shorter, more frequent observations from two or more observers per teacher provide a more reliable snapshot of teacher performance, compared with one individual performing a single, longer observation.
- **Building processes that increase trust and fairness will result in higher quality data:** Having detailed, communicated processes when it comes to evaluations and student surveys, as well as rigorous training and testing of observers against a set of standards or expectations increases data quality. Further, the report notes that utilizing such methods to provide feedback and train observers looks especially promising due to advances in video technology.
- **When surveying students, ensure confidentiality:** While student surveys are a highly debated topic, MET researchers used them to gauge teacher effectiveness. Specifically, they focused on "student perception surveys that assess key characteristics of the classroom environment, including supportiveness, challenge, and order (page 3)." The report notes that student survey data become more reliable when students feel that they are able to provide anonymous feedback.
- **Utilize multiple measures when building teacher evaluation or performance index formulas:** "Compared with schemes that heavily weight one measure, those that assign 33 percent to 50 percent of the weight to student achievement gains achieve more consistency, avoid the risk of encouraging too narrow a focus on any one aspect of teaching, and can support a broader range of learning objectives than measured by a single test." (Page 20)

Charlotte-Mecklenburg Schools 2012-13 Minimum Performance Expectations

Following are CMS' Minimum Performance Expectations for Teachers that were published in October 2012. This work influenced the CTF's career pathway design.

**Charlotte-Mecklenburg Schools
2012-13 Minimum Performance Expectations for Teachers**

		CMS Minimum Expectations for Summary Ratings on the North Carolina Professional Teaching Standards					
		Standard I	Standard II	Standard III	Standard IV	Standard V	Standard VI
Levels of Teaching Experience	Teaching Experience / Years Employed as a Teacher with CMS	Demonstrates Leadership	Establishes Respectful Environment for Diverse Population of Students	Knows the Content he/she is Teaching	Facilitates Learning for his/her Students	Reflects on his/her Practice	Contributes to the Academic Success of his/her Students
Beginning Teachers (including lateral entry teachers hired directly, as well as lateral entry teachers who join CMS through partnerships)	First Year Teacher	Rated <u>developing or above in each</u> of the standards <u>and</u> rated <u>proficient or above in at least 1</u> of the standards.					Student Achievement Baseline Established ↓
	Second Year Teacher	Rated <u>developing or above in each</u> of the standards <u>and</u> rated <u>proficient or above in at least 3</u> of the standards.					
	Third Year Teacher	Rated <u>proficient or above in each</u> of the standards.					
Experienced Teachers (teachers who have more than three years of experience, but are new to CMS)	Year One with CMS	Rated <u>developing or above in each</u> of the standards <u>and</u> rated <u>proficient or above in at least 4</u> of the standards.					Data Will Not be Used for Evaluation in 2012-13
	Year Two/Three with CMS	Rated <u>proficient or above in each</u> of the standards.					
Teachers Eligible for Career Status	See clarifications below	Rated <u>proficient or above in each</u> of the standards <u>and</u> rated <u>above proficient in at least 1</u> of the standards.					↓

Clarifying Information:

- Teachers are required to obtain proficient ratings in all five standards in order to be eligible to convert their current license from a:
 - Standard Professional 1 license to a Standard Professional 2 license
 - Lateral Entry license to a Standard Professional 1 license or a Standard Professional 2 license
- Standard Professional 1 and Lateral Entry licenses are granted for three years; however, each license can be converted prior to the third year if the teacher receives all proficient ratings.

Final Updates from 4/25/13 Meeting

- Experienced teachers coming from out of state receive a Standard Professional 1 license, but should not receive a three-year grace period for meeting performance expectations.
- Teachers eligible for career status include teachers who are:
 - Currently in their fourth consecutive year of full-time, continuous service in a teaching position with CMS or
 - Currently in their first year of teaching with CMS (CMS guideline) and previously received career status in another North Carolina LEA.
 - Teachers who have been awarded career status with CMS are expected to maintain proficient or above ratings in each of the standards and above proficient rating(s) in at least 1 of the standards.

Further Clarifying Information Regarding All Teachers:

- Rated proficient or above in each of the standards.
- Rated proficient or above in each of the standards and rated above proficient in at least 1 of the standards.

The minimum expectations described above are designed to recognize that first and second year teachers, and experienced teachers who are in their first year of employment with CMS, will continue to develop their skills, while at the same time making clear that these expectations are the “minimum” expectations and do not guarantee continued employment.

A number of factors will be taken into account in determining effective teaching for continued employment. The minimum expectations described above will be considered in conjunction with other factors, including but not limited to the efforts of the teacher to accept constructive feedback and demonstrate that continued improvement is on-going and likely to continue, as well as the conduct of the teacher and performance in areas critical to success in the classroom.

It continues to be Board policy to employ and maintain professionals who are performing at the highest levels of competence and discretion continues to rest with the Board to make determinations about continued employment.

These minimum expectations do not guarantee continued employment, but serve as a guide to inform evaluators and teachers of minimum expectations. From time to time, these minimum guidelines may change, or be different in certain circumstances, such as if a reduction in force is necessary.

This is the system currently being used in CMS.

Teacher and Leader Hiring

As the CTF began its work, members discussed the importance of hiring high quality candidates to increase overall building and district success. The team identified and researched the following steps related to teacher hiring, and felt it important to include these steps in planning for a new comprehensive compensation and evaluation system, as research shows that compensation program changes alone will not show long-lasting transformational changes.



To note, the CTF specifically discussed the creation and use of selection processes that use multiple measures of teacher and leader performance that correlate with student success.

Model Type Selection

Models reviewed by the committee include alternative compensation systems, pay differential systems, and career ladders/pathways. Following are the nationally accepted definitions of those systems:

- **Alternative Compensation System:** A salary system in which employee base pay increases are determined by factors other than educational attainment and years of service, such as the traditional step-and-level or state salary schedule.
- **Pay Differential Systems:** A one-time payment of direct or indirect compensation that is offered in addition to an individual's base pay. Payment may be paid on a month-to-month or one-time basis.
- **Career Ladder, Career Pathway or Career Lattice:** Innovative professional tracks through which individuals can more broadly impact and expand their role in their organization.

Three Main Types of Career Ladders

- **Performance-Based Ladders:** Teachers earn additional compensation based on examination results or evaluation results.

- **Job-Expansion Ladders:** Teachers earn additional compensation for taking on out-of-classroom activities or a new role, such as curriculum development, mentoring other teachers, or leading professional development activities.
- **Professional Development Ladders:** Teachers earn additional compensation based on participation in activities usually required for license renewal or upgrade, such as participating in staff development or professional development or obtaining college credit, an advanced degree, or National Board certification.

(Conley & Odden, 1995; National Association of State Boards of Education, 2002)

After reviewing more many models from a variety of districts and states, the CTF decided to construct a career pathway system for teachers that incorporated performance, job-expansion, and professional development. The CTF also decided to include a pay differential for licensed staff who work in hard-to-staff subject areas and hard-to-staff schools.

This means that the two components of the compensation system are **hard-to-staff position/building pay differentials** and a **career pathway system**.

System Measures

Per House Bill 950, the five criteria for award of bonuses or adjustments to base salary should include, but are not limited to, the following factors:

- Annual growth in student achievement of students assigned to a teacher's classroom, when applicable.
- Annual growth in student achievement of students assigned to a specific school.
- Assignment of additional academic responsibilities.
- Assignment to a hard-to-staff school.
- Assignment to a hard-to-staff subject area.

CMS' career pathway and pay differential structure utilizes all suggested criteria.

Hard-to-Staff Schools and Hard-to Staff Subject Area Pay differentials

CMS is considering this measure because it is part of the CMS vision to provide all students the best education available anywhere, preparing every child to lead a rich and productive life. Addressing the issues of hard to staff schools and subjects is also aligned to the mission of CMS to maximize academic achievement by every student in every school.

Definitions:

Hard-to-Staff Schools: Schools that have trouble retaining teachers and principals. Indicators of a hard-to-staff school would include:

- 1) Disproportionate number of students below grade-level
- 2) Disproportionate number of students deemed economically disadvantaged
- 3) High teacher turnover rate
- 4) Large number of lateral entry/probationary teachers.

***Comparison of data among CMS schools would determine the parameters for numbers 1-4 above.**

Hard-to-Staff Subject: Subject areas that have a multi-year pattern of shortage of teachers who are certified and highly qualified teachers. North Carolina has a formula that requires CMS to use to identify hard-to-staff subjects. The district will continue to identify these subjects the way the state has requested. Additional indicators to define hard-to-staff subjects include:

- 1) Critical need subjects
- 2) A subject or subjects having consistent mid-year turnover

- 3) A subject or subjects having consistent late hires
- 4) A subject or subjects having low teacher pay; pay that is ill-matched to the expertise required to teach the subject
- 5) A subject or subjects that require multi-task responsibilities
- 6) A subject or subjects deemed hard-to-staff by national standards

Hard to Staff Schools and Subjects Pay differentials

	Hard-to-Staff School	Hard-to-Staff Subject
Monetary Value	(Suggested) at least 8% of base pay	(Suggested) at least 12% of base pay
Payment Method	Pay differential paid monthly	Pay differential paid monthly
Definition/ Formula	Schools that have trouble retaining teachers and principals (as defined by the measures listed above).	North Carolina formula used to identify hard-to-staff subjects.
Rules	<ul style="list-style-type: none"> To receive either of the pay differentials described above, an employee must opt-in to the new compensation system for the pilot phase. Employees must be employed in a hard-to-staff school. They will receive a monthly pay differential for every month they are employed at least 95% of the 180 student days. An employee must be in attendance 95% of the time. (For an employee hired by the first day of school this means that the employee cannot miss 11 days or more. For an employee hired within the first 30 calendar days, the 95% rule applies, starting upon his/her date of hire.) The following types of leave will be held harmless (not count as days absent) and match federal law, state law, and the Board's current policies and term definitions: military leave, 	

	<p>FMLA - family medical leave (must be authorized through Human Resources), assault leave, jury duty, religious holidays, and off-campus duty (such as professional development opportunities or activities approved by the District).</p> <ul style="list-style-type: none"> • For employees who work in multiple buildings: • For an employee in a hard-to-staff school 50% of the time and a non-hard-to-staff school 50% of the time, the individual shall receive 50% of the pay differential rate. This means that in all other situations the rate of compensation shall be pro-rated. For example, for an employee who is in a hard-to-staff school 25% of the day, they shall receive 25% of the pay differential. • Employees must have teaching credentials for the subject area in which they function to be eligible under that category. • Pay differentials are for those who worked in a hard-to-staff school or hard-to-staff subject area. Payout is NOT influenced by an individual's evaluation (EVAAS or the NCEES). • Upon the occurrence of death eligible payment shall be made to the estate. • Employees who are in a hard-to-staff school AND in a hard-to-staff subject shall receive both pay differentials. • Employees who teach at least one hard-to-staff subject a day are eligible for the hard-to-staff pay differential.
Payout Timing	Payout will be monthly.

Measure – Question and Answer

1. How might identifying hard-to-staff schools and subjects garner support from stakeholders, including students, parents, and principals?

- Identifying hard-to-staff schools and subjects can have a positive or negative effect.

- Teachers might not want to work at schools that seem to be struggling with academics or schools that might have negative images.
- Parents might not want to send their child to schools that are deemed to be hard-to-staff because of the negative connotation.
- There are already schools that many people in the community deem to be less desirable.
- On the other hand, giving support or incentives to teachers that choose to work and have positive results at schools or in subjects that are hard to staff can help a school or a subject area attract and retain teachers.
- Publicly identifying schools that are struggling might garner support from the community, and encourage people to step in and help these schools through volunteerism and or philanthropy.

2. What are the critical requirements after identifying hard-to-staff schools and subjects to recruit and retain highly qualified teachers?

The CTF believes that success in hard-to-staff schools needs to be rewarded with financial incentives and/or recognition. The promises that a school makes to staff to get them into the school must be kept in order to retain the teachers at the school or in those subjects. The incentives given to recruit staff should also be given to retain staff in those schools and subjects. Teachers in hard-to-staff schools or subjects should not be punished for not making growth, but should be given the ability to transfer to another school that might be a better fit.

Teachers should be able to use the district's evaluation system (North Carolina Educator Evaluation System) to prove that they have tried strategies to reach all of their students.

Teachers with specific qualifications should not be required to do more work because the positions have been hard to fill. Schools should not track and lump low-performing students in

the same class. It is critical that all teachers in hard-to-staff schools and subjects be recognized for making growth with their students and that if a teacher is not a fit for a hard-to-staff school or subject, he/she should be given the option to choose another position in a another school that might be a better fit.

3. Which data points could be used to identify hard-to-staff subjects?

Vacancies need to be tracked throughout the year. The district must collect data on what areas have vacancies at the start of the year and mid-year. It also needs to keep data on the number of teachers leaving mid-year without giving a 30 day notice.

There is also a concern that many students coming out of colleges and universities with degrees in hard-to-staff subject areas have better-paying options outside of education. Data need to be collected on private- or public-sector jobs that are comparable to hard-to-staff knowledge-based roles. The pay differentials then need to be considered when looking at hard-to-staff subjects, and the appropriate level of additional compensation should be awarded.

4. What would the process look like?

CMS will identify hard to staff schools and subjects using the previous year's data. Once a school or subject is identified as hard to staff, it will keep that distinction for three years.

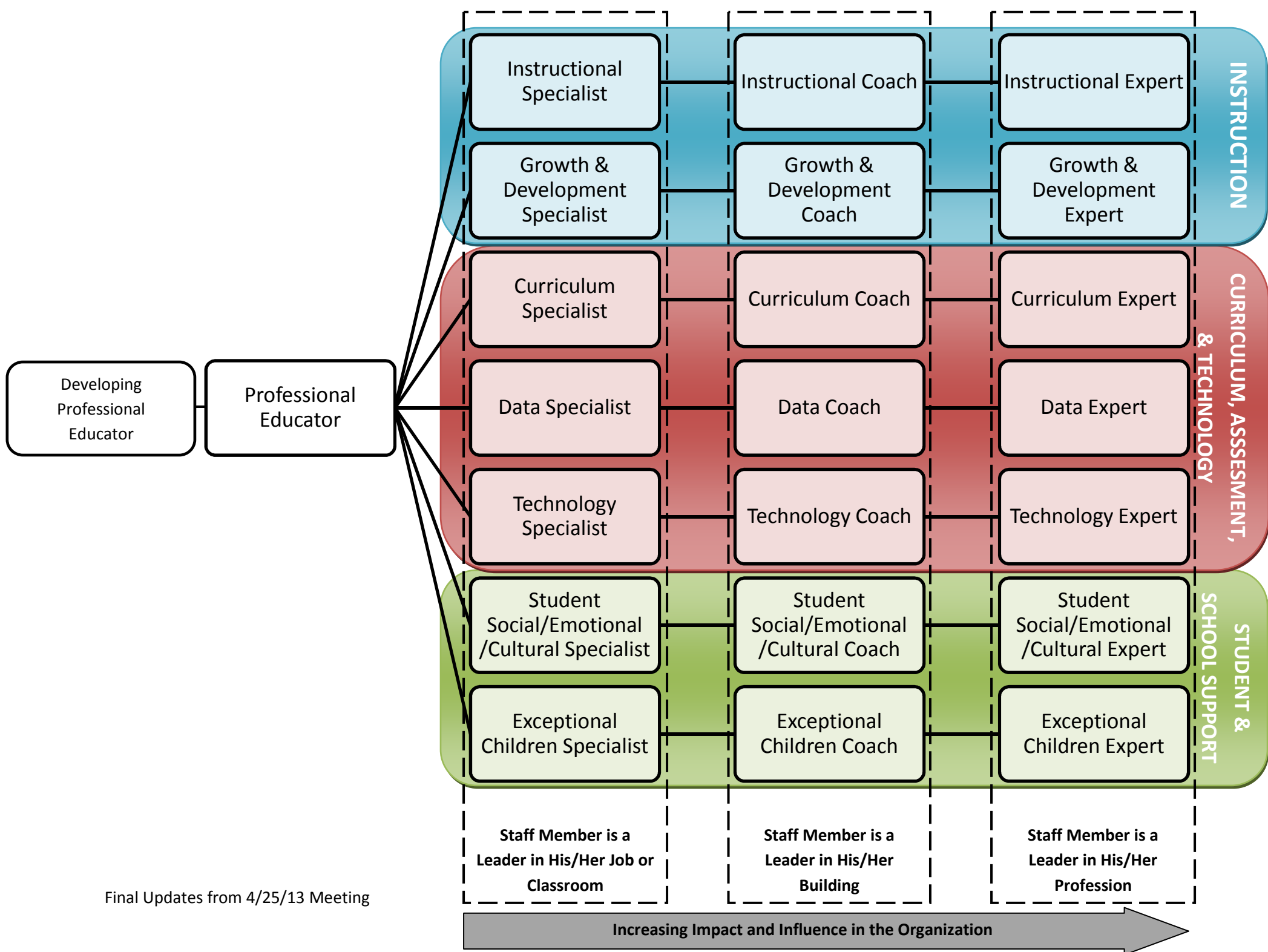
Teachers were concerned that taking away the distinction too early might cause a building to remain hard to staff. After the three years, schools and subjects will be evaluated again to see if they still qualify as hard to staff.

Career Pathway

Career paths have become popular in education in recent years. Career paths provide opportunities for high-performing educators to advance professionally, often while allowing them to maintain a presence where they are needed the most – in classrooms. They provide the ability for districts to attract, retain, develop, and reward individuals by showing potential career progression beyond entry points.

The CTF elected to create a career track for high-performing individuals who may be interested in roles outside of the traditional supervisory option, including opportunities for educators who are interested in a management or mentoring role, as well as for those who wish to remain in the classroom working with children 100 percent of the time. The system was designed to allow for upward mobility, increased compensation, and professional growth.

The career pathway system is illustrated on the next page.



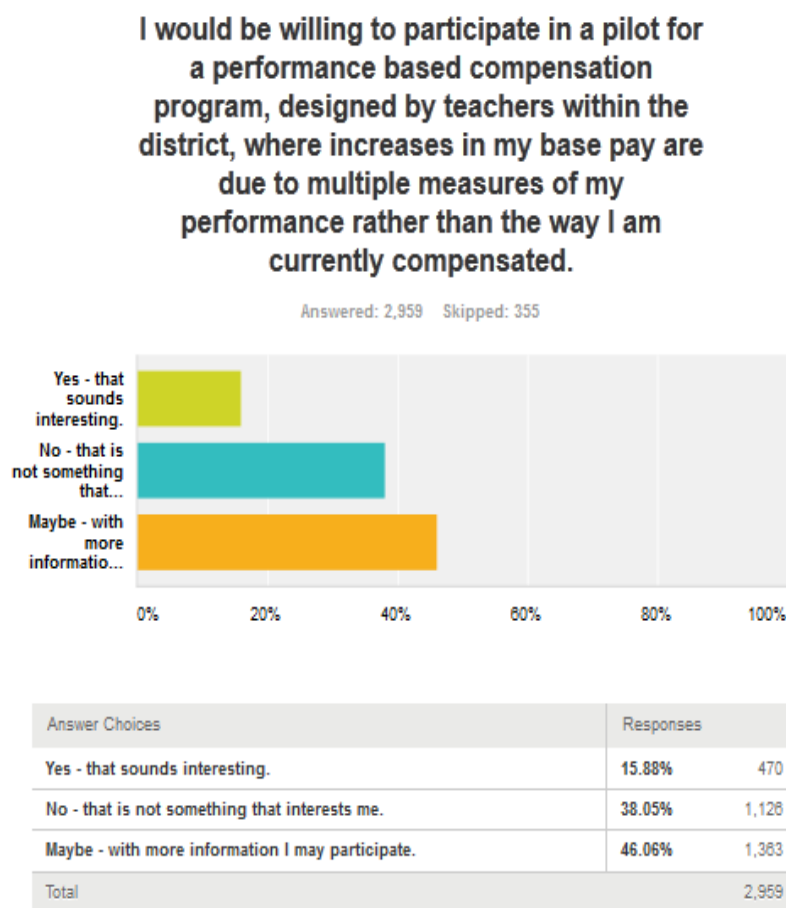
In examining the career pathway on the previous page it is important to understand the following:

- There are three areas in which teachers can develop their expertise and job roles: Instruction; Curriculum, Assessment, and Technology; and Student and School Support.
- Every teacher will move through the system from developing professional educator to professional educator, depending upon previous years of experience in CMS or another organization. Details on placement of new teachers and current teachers can be found on subsequent pages.
- There are three levels of roles in which teachers with the appropriate levels of performance and involvement can choose to become involved. These roles are “Specialists,” who have classroom- or department-level impact and influence; “Coaches,” who have building level impact and influence; and “Experts,” who are considered leaders in the district and in the profession. This aligns with the North Carolina Educator Evaluation System (NCEES) evaluation tool.
- There are seven pathways in which teachers can choose to participate. These roles were created with the intention of offering not only teachers, but guidance counselors and other licensed staff, the ability to participate.
- The top “Instructional” pathway was created to give teachers the opportunity to take on leadership responsibilities without leaving their classroom.
- The “Growth & Development pathway was created to give teachers the opportunity to take on additional leadership and mentoring responsibilities but still remain in the classroom.
- All seven paths and a short description of their positions duties are described on the following pages.
- All “Expert” positions must be applied for and candidates must meet performance, leadership participation, and professional development requirements.

Opt In/ Opt Out

In a survey of more than 2,900 CMS teachers and principals, 15.88% of respondents noted that they would be willing to participate in a pilot for a performance-based compensation system, 46.06% noted that they would be willing to participate with more information, and 38.05% noted that they would not be willing to participate in a

pilot program. Due to these responses the CTF decided that the system should be piloted for a three-year period and that participants should have the ability to “opt in” or “opt out” of the program. Participants will “opt in” to the pilot program when it begins and then have the ability to “opt out” of the program after the three-year pilot ends. Once “opt in” is selected, the participant cannot “opt out” until the end of the three-year pilot ends. The participants that did not initially “opt in” will have the opportunity to “opt in” at the end of the three-year pilot. Once “opt in” is selected at the end of the three-year pilot, the participants will not have the opportunity to “opt out” at any time in the future.



Other districts across the country that have successfully implemented a performance-based compensation system, such as Denver Public Schools in Colorado and Putnam County School System in Tennessee employ an “opt-in” or “opt-out” policy for teachers. After reviewing district examples, the CTF designed the following “Opt-in”/“Opt-Out” Rules.

General Rules

1. All new staff hired as of 2014-2015 school year are automatically are enrolled in the program, despite previous years of experience in other districts or states. Where an individual is placed is described below:

Description	Classification	System Participation	Beginning Placement
All new teachers with three years of experience or less	Developing Professional Educator	All new hires as of the program's start date are automatically part of the pilot, regardless of previous experience in the district or others. They do not have the ability to "opt out" of participation.	All new staff members will enter with previous years of experience as the current CMS/North Carolina Department of Instruction policy defines and their starting pay will be based on their appropriate step/column according to the district's step-and-level system. From this point forward in the pilot, additional increases in compensation or pay differentials will then be part of the new system, not automatic based solely on gaining years of experience
All new teachers with three years of previous experience or more, but new to CMS	Professional Educator		

2. Certified employees hired prior to the 2014-2015 school year will be given the opportunity to "opt in" to the system. This must be done by signing an affidavit that confirms participation and the understanding that participation could allow individuals to increase their pay or cause pay to stand stagnant if performance criteria are not met and professional involvement does not occur. All individuals who do not sign the affidavit to confirm participation will be considered "opted-out" by default for the entire period of the pilot. These certified employees are not eligible for any bonus/stipend opportunities that are available to those who opted in to the pilot program, and will remain on the step and level system.
3. For those who have "opted in" or all new hires for 2014 – 2015 school year:
 - i. Participants will NOT receive automatic step-and-level salary increases.

- ii. Participants will receive compensation based on criteria of the model in the form of a pay differential or an increase in base pay.
- iii. Participants will NOT receive pay differentials or base pay increases if individual eligibility requirements, performance expectations, or professional responsibilities are not met. This means that from one year to the next, a participant's salary could increase or remain at the previous year's rate.

Description	Classification	System Participation	Beginning Placement
Teachers hired prior to the 2014-2015 school year with three years of experience or less	Developing Professional Educator	All teachers who opted-into the three-year pilot	All staff members will enter at their current base-pay rate. From this point forward in the pilot, additional increases in compensation or pay differentials will then be part of the new system, not automatic based solely on gaining years of experience.
Teachers hired prior to 2014-2015 school year with more than three years of experience (who also meet the 2012-2013 placement rules)	Professional Educator	All teachers who "opted-into" the three year pilot	

- v. This system is NOT a way to decrease an individual's current level of compensation, as long as the individual maintains their current levels of certification.
- vi. Participants will be placed in the Professional Educator pathway step for the first year of the pilot and progression will be made going forward based on North Carolina Educator Evaluation System evaluation scores, growth, leadership roles, and participation in targeted

professional development activities.

4. For those who have opted out of participation in the new compensation system for the pilot phase:
 - i. Employees will follow the current step-and-level system, and be part of district pay freezes, overall increases, or reductions.
 - ii. Employees will remain eligible for compensation for extra duties at the school or district level.
 - iii. Employees who qualify for longevity pay by 2016 will continue to receive these funds.
 - iv. Employees will NOT be eligible for pay differentials or base pay increases based on the new alternative compensation model.
 - v. Employees are not able to participate in the career pathway program positions or site-based pay differentials.
5. After the three-year program pilot, an employee who originally opted-into the program (not new hires as of 2014- 2015) will be given the ability to opt-out and return to the closest step on the state salary schedule.

Movement in the Career Pathway

Alignment is key to creating a successful system. Thus, the CTF felt that the career pathway system should be aligned to the district's Minimum Performance Expectations for Teachers. This allows for performance requirements to be a focus but truly allows teachers in their first three years to focus on teaching and personal growth rather than compensation and additional roles and responsibilities. For a teacher to progress from Year 1 to Year 2, he/she must meet CMS' Minimum Performance Expectations for Teachers. This means that a teacher in Year 1 must be rated Developing or above in four of the state standards I through V, with a score of at least Proficient in at least one standard. Teachers in Year 2 must be rated Proficient or above in at least three of the state standards I through V and Developing or above in the remaining two standards. Teachers in Year 3 must be rated Proficient or above in state standards I through V. Appropriate performance increases would be given to teachers who meet those requirements, with the understanding that all teachers who do not meet the Minimum Performance Expectations would be counseled appropriately and not receive performance increases.

For example, the new entry pay system for Developing Professional Educators could appear as follows (all true financial figures would be calculated using district compensation information as well as the budget for the pilot to ensure ongoing financial sustainability):

Developing Professional
Educator

	Year 1	Year 2	Year 3
Bachelors	\$35,419	\$35,950	\$36,490
Advanced Degree	\$38,996	\$39,527	\$40,058

Increases for those who meet CMS Minimum Performance Expectations.

The CTF has decided that after a teacher has moved from the Developing Professional Educator category on the career pathway, teachers should be able to progress in the career pathway if they are rated “Effective” or “Highly Effective” and meet the criteria for professional development and leadership activities as defined in the North Carolina Educator Evaluation System. [North Carolina Standards 1-5](#)

To be eligible, a teacher must prove to be proficient in their current duties and show readiness to take on additional responsibilities. In a suggested method to do this, teachers will be able to earn points based on effectiveness level, professional development involvement, and

additional leadership roles and responsibilities, involving all of the suggested measures in HB 950. In addition, the CTF plans to follow the recommendations of the MET project, for example, that value added measure used in evaluation should be weighed more than 33.33 and less than 50 percent Points for roles/responsibilities, PD, and performance will be specifically assigned upon plan approval. In a suggested point system, credit could be given to a variety of roles/responsibilities, PD participation, and performance. The following is an example of what a point matrix may look like (upon plan approval specific activities would be identified and given points, with the understanding that value-added or achievement would be weighted 1/3 of the overall points, evaluation would be weighted 1/3 of overall points, and additional roles and responsibilities and professional development activities would be weighted 1/3 of overall points.)

This point chart is only an example. The CTF recommends further exploration in order to determine the exact point system would work.

Performance Level/Role	Points
Highly Effective (Standards 1 – 6)	7
Effective (Standards 1 – 6)	5
Grade Level Chair	1
Data Team	1
STAC	1
LEP Team	1
CharEd/ Service Learning	1
School Leadership Committee	1
Department Chair	1
Specific PD	(.5pts/CEU)
Grant Writing	1 (max 2 pts)
Intervention Team	1
Team Leader	.5pts

(It is important to remember that “Highly Effective” and “Effective” scores are given to individuals with three or more years of value-added data and evaluations that meet specific requirements as discussed previously. Thus, a rating of “Highly Effective” or “Effective” contains all six state standards.)

The following example illustrates how an individual could move through the career ladder (actual requirements will be defined upon plan approval):

For a teacher to move from a “Professional Educator” to a “Specialist,” that individual must obtain 10 points. For a teacher to move from “Specialist” to “Coach” the individual must have two years of experience as a “Specialist” and have earned 14 points. An individual would perform and be involved in a variety of activities, working towards the point values that have been communicated with staff.

When it comes to how pay will progress, the chart below offers an explanation of how an individual may receive additional compensation due to performance, professional development, and additional roles/responsibilities. **It is important to note that dollar values are only an example. True values will be determined when funding is obtained to ensure programmatic and financial sustainability.**

Specialist Scale	Coach Scale	Expert Scale
Step 10: +\$7,000	Step 10: +\$13,000	Step 10: \$25,000
Step 9: +\$6,500	Step 9: +\$12,000	Step 9: +\$24,000
Step 8: +\$6,000	Step 8: +\$11,000	Step 8: +\$23,000
Step 7: +\$5,500	Step 7: +\$10,200	Step 7: +\$22,000
Step 6: +\$5,000	Step 6: +\$9,000	Step 6: +\$20,000
Step 5: +\$4,500	Step 5: +\$7,800	Step 5: +\$18,000
Step 4: +\$4,000	Step 4: +\$6,600	Step 4: +\$16,000
Step 3: +\$3,000	Step 3: +\$5,400	Step 3: +\$13,000
Step 2: +\$2,000	Step 2: +\$4,200	Step 2: +\$10,000
Step 1: +\$1,000	Step 1: +\$3,000	Step 1: +\$7,000

To progress from “Specialist” to “Coach” and “Coach” to “Expert” one must have two years of experience in the previous role. “Expert” roles will involve an application process due to the number of individuals needed to fill specific roles. The **example above** demonstrates how a teacher can progress to the highest pay level at a quicker pace than the current step and grade system. One must have 2 years in current scale, including specific credentials to move to the next scale.

Descriptions of Career Pathway Roles & Responsibilities

Following are brief explanations of the roles identified by the CTF for the career pathway program. **Full job descriptions would be built for each of these positions, but the intent of the positions would remain the same.**

Career Path Position: Instructional Specialist

Primary Duties: An Instructional Specialist shall remain a classroom teacher for 100 percent of his/her time. Instructional Specialists are highly effective and effective teachers who are willing to open their classrooms and share lessons with the purpose of growing their peers. Instructional Specialists will be highly respected by their peers as being exemplary models for increasing student academic progress and achievement.

Career Path Position: Instructional Coach

Primary Duties: An Instructional Coach shall remain a classroom teacher for 100 percent of his/her time. Instructional Coaches are highly effective and effective teachers who are willing to open their classrooms and share lessons with the purpose of growing their peers. Instructional Coaches will be highly respected by their peers as being exemplary models for increasing student academic progress and achievement within their respective building.

Career Path Position: Instructional Expert

Primary Duties: An Instructional Expert shall remain a classroom teacher for 100 percent of his/her time. Instructional Experts are highly effective and effective teachers who are willing to open their classrooms and share lessons with the purpose of growing their peers.

Instructional Experts will be highly respected by their peers as being exemplary models for increasing student academic progress and achievement within CMS and within the teaching profession.

Career Path Position: Growth & Development Specialist

Primary Duties: Growth and Development Specialists will act as coaches and mentors for other teachers across the district. Growth and Development Specialists are highly effective and effective teachers who are willing to coach, mentor, and grow others as well as provide critical formative feedback for improvement. Growth and Development Specialist will be highly respected by their peers as being exemplary models for increasing student academic progress and achievement as well as leading and growing others by acting as a best practice role model.

Career Path Position: Growth & Development Coach

Primary Duties: Growth and Development Coaches will act as coaches and mentors for other teachers in their building. Growth and Development Coaches are highly effective and effective teachers who are willing coach, mentor, and grow others as well as provide critical formative feedback for improvement. Growth and Development Coaches will be highly respected by their peers as being exemplary models for increasing student academic progress and achievement as well as leading and growing others in their building. This individual position may require a teacher to teach approximately 75 percent of the time and mentor/coach 25 percent of the time.

Career Path Position: Growth & Development Expert

Primary Duties: Growth and Development Experts will act as coaches and mentors for other teachers across the district. Growth and Development Experts are highly effective and effective teachers who are willing coach, mentor, and grow others as well as provide critical formative feedback for improvement. Growth and Development Experts will be highly respected by their peers as being exemplary examples/models for increasing student academic progress and achievement as well as leading and growing others in the district and in their profession.

Career Path Position: Curriculum Specialist

Primary Duties: A Curriculum Specialist is crucial to student success. Curriculum Specialists must know and understand the North Carolina state standards, effective pedagogy, the Common Core State Standards, and the district curriculum. Curriculum Specialists must have a working knowledge of district educational issues, the monitoring of learning and teaching, an understanding of curriculum and staff development. Responsibilities of the Curriculum Specialist include instruction excellence as well as implementing, and evaluating program relevance and student or teacher needs. Curriculum Specialists will work with Curriculum Experts and Curriculum Coaches; organize and structure students' learning experiences; and monitor success through formative assessments. Curriculum Specialists must work with individuals and teams to provide support on reading, writing, and communication strategies.

Career Path Position: Curriculum Coach

Primary Duties: A Curriculum Coach is crucial to the success and development of schools and the raising of student achievement. Curriculum Coaches must know and understand the North Carolina state standards, effective pedagogy, the Common Core State

Standards, and the district curriculum. Curriculum Coaches must have a working knowledge of district educational issues, the monitoring of learning and teaching, and an understanding of curriculum and staff development. Responsibilities of the Curriculum Coach include curriculum development, instruction, and staff development as well as planning, implementing, and evaluating program relevance and student, teacher, leader, and building needs. Curriculum Coaches will mentor Curriculum Specialists and work with Curriculum Experts to lead the planning and delivery of the district's curriculum; organize and structure students' learning experiences; and monitor success through formative assessments. Curriculum Coaches must work with individuals, teams, building-level leaders, and Curriculum Experts to provide support on reading, writing, and communication strategies.

Career Path Position: Curriculum Expert

Primary Duties: A Curriculum Expert is crucial to the success and development of the district and the raising of student achievement. Curriculum Experts must know and understand the North Carolina state standards, effective pedagogy, the Common Core State Standards, and the district curriculum. Curriculum Experts must have a working knowledge of state and district educational issues, the monitoring of learning and teaching, and an understanding of curriculum and staff development. Responsibilities of the Curriculum Expert include curriculum development, instruction, and staff development as well as planning, implementing, and evaluating program relevance and student, teacher, leader, building, and district needs. Curriculum Experts should work with the curriculum department to lead the planning and delivery of the district's curriculum; organize and structure students' learning experiences; and monitor success through formative assessments. Curriculum Experts must work with individuals, teams, departments, building-level leaders, district-level leaders and possibly state-level leaders to provide support on reading, writing, and communication strategies.

Career Path Position: Data Specialist

Primary Duties: A Data Specialist will act as a coach, mentor, and data leader for his/her classroom, grade-level, or subject area. In this role, the Data Specialist will perform data collection, reporting, and analysis. The Data Specialist must possess the ability to perform data analysis and collection as well as help others understand how such data and information can be used to improve curriculum, instruction, and assessments, as well as increase student and teacher performance. The Data Specialist will monitor classroom results. The Data Specialist may communicate with students and families concerning student academic risks, challenges and opportunities as measured by a variety of types of school-level and individual data. The Data Specialist will report directly to the principal. The Data Specialist will work in conjunction with other Data Specialists and Data Coaches. The Data Specialist will be mentored by and work with Data Coaches and Data Experts. The Data Specialist should continually utilize professional development opportunities that are related to data analysis.

Career Path Position: Data Coach

Primary Duties: A Data Coach will act as a coach, mentor, and data leader for his/her building. This role requires working directly with teachers and building leaders who are involved in data collection, reporting, and analysis. The Data Coach must possess the ability to perform data analysis and collection as well as help others understand how such data and information can be used to improve curriculum, instruction, and assessments, as well as increase student, teacher, leader, and building performance. The Data Coach will monitor building testing and results and assist his/her school with the analysis. The Data Coach may communicate with students and families concerning student academic risks, challenges and opportunities as measured by a variety of types of school-level and individual data. The Data Coach will report directly to the principal. This relationship between students and the Data Coach shall be defined by the

principal of the building where the Data Coach works. The Data Coach will work in conjunction with other building Data Coaches. The Data Coach, with the help of the Data Expert, will work to grow and mentor Data Specialists. The Data Coach will also work to ensure teachers are receiving and utilizing professional development opportunities that are related to data analysis.

Career Path Position: Data Expert

Primary Duties: A Data Expert will act as a coach, mentor, and data leader for the district. This role requires working directly with teachers, building leaders, and district staff who are involved in data collection, reporting, and analysis. The Data Expert must possess the ability to perform data analysis and collection as well as help others understand how such data and information can be used to improve curriculum, instruction, and assessments, as well as increase student, teacher, leader, and building performance. The Data Expert, with the help of the central office, will work to grow and mentor Data Specialists and Data Coaches. Additionally, the Data Expert will work to ensure teachers and leaders are receiving and utilizing professional development opportunities that are related to data analysis.

Career Path Position: Technology Specialist

Primary Duties: A Technology Specialist is an individual who utilizes best practices when it comes to technology and curriculum integration. Technology Specialist must be able to know and understand how to integrate the use of software, hardware, and internet resources in student learning as well as have familiarity with items and practices such as databases, word processing, spreadsheets, website development, digital video, image creation, and audio editing. Technology Specialist must work with Technology Experts and Technology Coaches to create learning resources for students, teachers, and staff. These resources may include online courses, websites, blogs, programs, databases, tutorials, digital portfolios, and more for smart phones, computers, tablets, iPad, etc.

Teachers should help students use technology to learn content, think critically, solve problems, discern reliability, use information, communicate, innovate, and collaborate. Further this individual shall work to expand access and use of technology to provide innovative learning environments and experiences for every child; support 21st century learning and ensure responsible digital citizenship; and be actively working to digitize curriculum by widening access to methods and materials that reach diverse learners.

Career Path Position: Technology Coach

Primary Duties: A Technology Coach will work to collaborate with teachers and building leaders to support their use of technology in delivery of curriculum. Technology Coaches must be able to know and understand how to integrate the use of software, hardware, and internet resources in student learning as well as have familiarity with items and practices such as databases, word processing, spreadsheets, website development, digital video, image creation, and audio editing. Technology Coaches must work with Technology Experts and Technology Specialists to create learning resources for students, teachers, and staff. These resources may include online courses, websites, blogs, programs, databases, tutorials, digital portfolios, and more for smart phones, computers, tablets, iPad, etc. Specifically, Technology Coaches are also responsible for mentoring Technology Specialists. Technology Coaches should help students use technology to learn content, think critically, solve problems, discern reliability, use information, communicate, innovate, and collaborate. Individuals must model best practices in using technology in instruction as well as provide professional development to teachers and building leaders. Further, this individual shall work to expand access and use of technology to provide innovative learning environments and experiences for every child; support 21st Century learning and ensure responsible digital citizenship; and be actively working to digitize curriculum by widening access to methods and materials that reach diverse learners.

Career Path Position: Technology Expert

Primary Duties: A Technology Expert will work to collaborate with teachers, building leaders, and central office staff to support their use of technology in delivery of curriculum. Technology Experts must be able to know and understand how to integrate the use of software, hardware, and internet resources in student learning as well as have familiarity with items and practices such as databases, word processing, spreadsheets, website development, digital video, image creation, and audio editing. Technology Experts must work with Technology Coaches and Technology Specialists to create learning resources for students, teachers, and staff. Specifically, Technology Experts are responsible for mentoring Technology Coaches. These resources may include online courses, websites, blogs, programs, databases, tutorials, digital portfolios, and more for smart phones, computers, tablets, iPad, etc. Technology Experts know when and how to use technology to maximize student learning. Technology should help students use technology to learn content, think critically, solve problems, discern reliability, use information, communicate, innovate, and collaborate. Individuals must model best practices in using technology in instruction as well as provide professional development to teachers, leaders, other district staff, and possibly to other professionals outside the district. Further, this individual shall work to expand access and use of technology to provide innovative learning environments and experiences for every child; support 21st Century learning and ensure responsible digital citizenship; and be actively working to digitize curriculum by widening access to methods and materials that reach diverse learners.

Career Path Position: Student Social/Emotional/Cultural Specialist

Primary Duties: A Student Social, Emotional, and Cultural (SSEC) Specialist shall work to encourage a district environment that is inviting, respectful, supportive, inclusive, and flexible. This individual should have training, knowledge, and experience working with

diverse cultures and differing needs of student and their families. The SSEC Specialist shall work with SSEC Coaches and SSEC Experts in developing and/or selecting materials and lessons that counteract stereotypes and in assessing and influencing student's development, personality, and performance. This individual must appreciate differences in people, build positive, appropriate relationships as well as maintain high expectations for all students.

Career Path Position: Student Social/Emotional/Cultural Coach

Primary Duties: A Student Social, Emotional, and Cultural (SSEC) Coach shall work to encourage a district environment that is inviting, respectful, supportive, inclusive, and flexible. This individual should have training, knowledge, and experience working with diverse cultures and differing needs of student and their families. The SSEC Coach shall work with SSEC Specialist in their building and help to support SSEC Experts. SSEC Coaches shall work with school leadership and teachers in their building to help develop and selecting materials and lessons that counteract stereotypes and in assessing and influencing student's development, personality, and performance. This individual must appreciate differences in people, build positive, appropriate relationships as well as maintain high expectations for all students.

Career Path Position: Student Social/Emotional/Cultural Expert

Primary Duties: A Student Social, Emotional, and Cultural (SSEC) Expert shall work to encourage a district environment that is inviting, respectful, supportive, inclusive, and flexible. This individual should have training, knowledge, and experience working with diverse cultures and differing needs of student and their families. The SSEC shall assist SSEC Coaches, SSEC Specialists, teachers, school leadership, and other CMS departments in developing and/or selecting materials and lessons that counteract stereotypes and in assessing

and influencing student's development, personality, and performance. This individual must appreciate differences in people, build positive, appropriate relationships as well as maintain high expectations for all students.

Career Path Position: Exceptional Children Specialist

Primary Duties: An Exceptional Children Specialist shall provide subject matter knowledge, support, and thought leadership while remaining in the classroom for 100 percent of their time. Exceptional Children Specialists are highly effective and willing to share lessons and best practices with their peers. Exceptional Children Specialists should have a working knowledge of federal, state and district laws, requirements, and programs which support special education students including Individual Education Plans (IEPs), etc. Exceptional Children Specialists will be highly respected by their peers as being exemplary examples/models for increasing student academic progress and achievement within their building.

Career Path Position: Exceptional Children Coach

Primary Duties: An Exceptional Children Coach shall provide subject matter knowledge, and thought leadership as they move into a support position, and out of the classroom, for 50 percent of their time. Exceptional Children Coaches are effective and highly effective and willing to share lessons and best practices with the purpose of growing peers within their building. Exceptional Children Coaches will engage students and ensure their needs are being through inclusion and other models of effective practice. Exceptional Children Coaches must have a working knowledge of federal, state and district laws, requirements, and programs which support special education students including Individual Education Plans (IEPs), etc. Exceptional Children Coaches will be highly respected by their peers as being exemplary examples/models for increasing student academic progress and achievement within CMS and within their building.

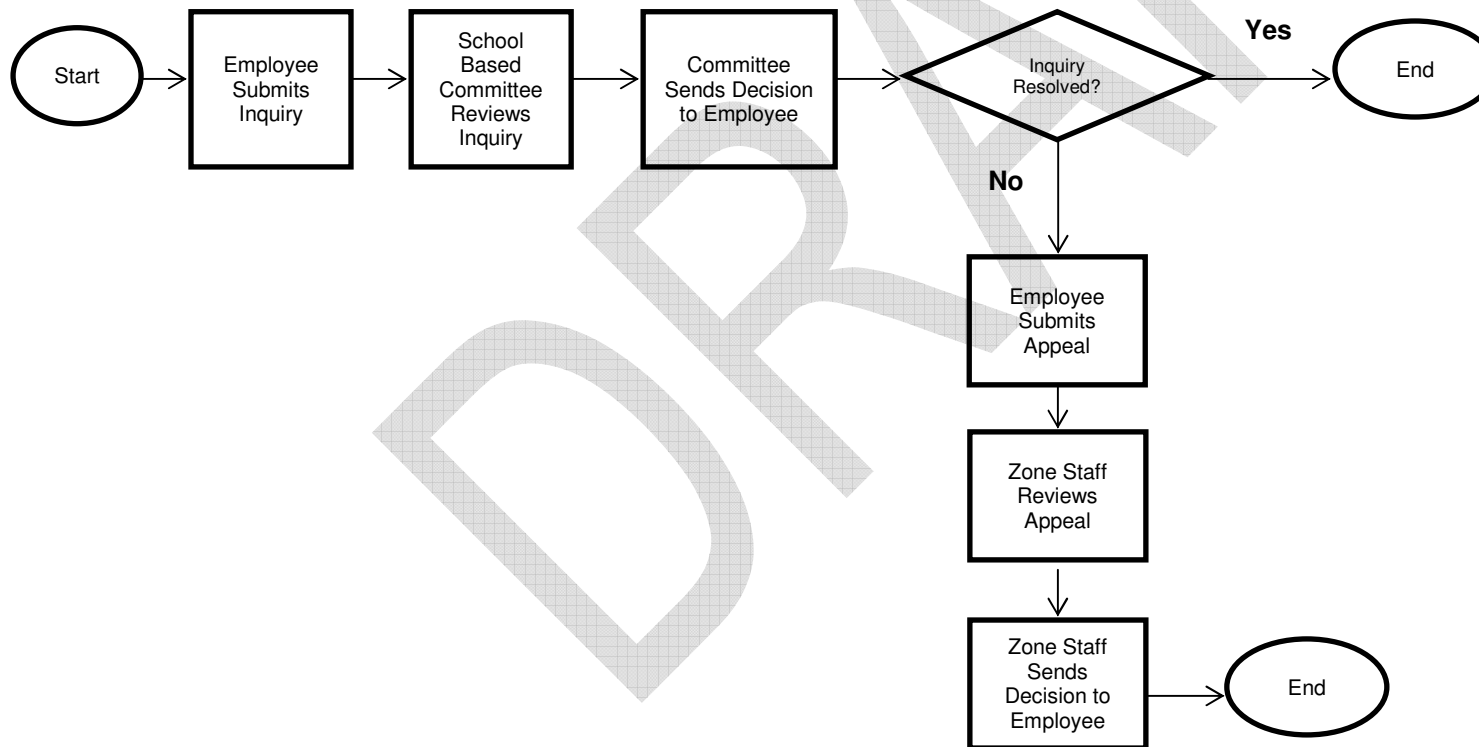
Career Path Position: Exceptional Children Expert

Primary Duties: An Exceptional Children Expert shall provide subject matter knowledge, professional development to relevant CMS staff, and leadership as they move into a support position, and out of the classroom, for 100 percent of their time. Exceptional Children Experts are effective and highly effective and willing to share lessons and best practices with the purpose of growing the organization and the profession. Exceptional Children Experts will engage students and ensure their needs are being met through inclusion and other models of effective practice. Exceptional Children Experts must have a working knowledge of federal, state and district laws, requirements, and programs which support the entire spectrum of special education students including Individual Education Plans (IEPs), etc. Exceptional Children Experts will be highly respected by their peers as being exemplary examples/models for increasing student academic progress and achievement within CMS and within the teaching profession.

Issue Resolution Process

The formal issue resolution process is designed to give staff the opportunity to have an identified school based committee review the information used to determine their awards for suspected problems with their estimated payment. Inquiries submitted will be reviewed by the designated committee. Upon review, the school committee would determine the resolution process within a specified timeframe, and a determination will be returned to the employee including reason for the determination. Employees will then have the opportunity to appeal the determination to the zone level. Appeals will be submitted in writing, including all necessary supporting documentation and a copy of the original committee determination. If requested, the employee will appear before the zone level committee to answer questions and/or explain the documentation. The zone representatives who participate in the appeal will provide employee with a final determination.

The following diagram is an example of an Issue Resolution Process



Professional Development and Training Plan for the Roll Out of the New Model

This professional development plan was created by CMS' Strategic Compensation Design Committee. Its purpose is to ensure meaningful learning opportunities are available to support CMS educators' understanding of strategic compensation and related topics (e.g., value-added data, evaluation), and what they mean within the context of the district.

The table below is an example of Training Topics

Proposed Training Topics	Description What are the goals of the training? What topics will be addressed?	Resource Planning Who will conduct the training? For whom will the training be?
What is strategic compensation?	<ul style="list-style-type: none">• Discuss background information necessary to developing an understanding of the rationale behind strategic compensation (e.g., history of educator compensation).• Define key terms.• Clarify what strategic compensation is and what it is not.• Show examples of compensation models from other states.	School-based ambassadors will receive training from the strategic compensation task force
How will you be measured?	<ul style="list-style-type: none">• Clearly and explicitly define the measures to be used in the compensation system.• Explain the process involved in measuring performance(e.g., Who will measure whom?).	TBD
What is value-added?	<ul style="list-style-type: none">• Help teachers understand the basics of the value-added metric.• Explain how it is incorporated in Standard 6.• Invite teachers to ask questions and engage in thoughtful conversation about how value-added works.• Demonstrate how to access and understand value-added reports.• Explain diagnostic qualities of value-added for school improvement.	<ul style="list-style-type: none">• EVAAS expert• Power schools expert ambassador

	<ul style="list-style-type: none"> • Share value-added tools and resources that are available to educators, and demonstrate how to access them. • Discuss key dates and other information regarding timelines related to value-added data (e.g., When are reports delivered?). 	
Career Ladders	<ul style="list-style-type: none"> • Define “career ladder.” • Define specific career path positions (e.g., Master Teacher, Content Specialist, Mentor Teacher). • Explain the process and requirements for moving through the career ladder system. 	School ambassador
What Base Increase/Bonus	<ul style="list-style-type: none"> • Define “base increase” and “bonus”. • Explain the differences between the two. • Address common misconceptions around these and other elements of total compensation. • Explain how these are used in CMS’ compensation program. 	School ambassador
Opt in/ Opt out	<ul style="list-style-type: none"> • Explain the process of opting in or out of the strategic compensation program. • Explain the impact of opting in or out. • Discuss the timeline and key dates related to this process. 	School ambassadors
Issue Resolution	<ul style="list-style-type: none"> • Describe the process for resolving any issues that may arise during various phases of implementation of the compensation program (e.g., categorization, eligibility, payout). 	District representatives
New Hire Training	<ul style="list-style-type: none"> • Help new hires understand key elements of the strategic compensation program, including: <ul style="list-style-type: none"> ○ Measures used ○ Timeline and key dates ○ Issue resolution process 	All new hires who are eligible to participate in the strategic compensation program should receive this training.
Evaluation Issue Resolution Process <i>Retrain</i>	<ul style="list-style-type: none"> • Describe the process for resolving any issues that may arise during the evaluation process (refresher training to build on previous training on this topic and clarify misunderstandings). 	All district teachers should receive this training.

DRAFT

Thinking through Sustainability

CMS is committed to establishing a fully sustainable compensation system. Specifically, CMS is dedicated to ensuring HB 950 is successful, and most importantly, CMS is committed to recognizing and compensating teachers. The district is considering a number of strategies for ensuring the financial sustainability of our strategic compensation program. The primary reason that the CTF chose an alternative compensation or career pathway system as opposed to a bonus system was for reasons of system sustainability. Another possible option is the acquisition of additional funding, such as Teacher Incentive Funds (TIF) grants or private foundation (Gates, Dell, Walton, etc.) dollars or funds from businesses such as Wells Fargo, NASCAR, Lowes, Duke Energy, or Chiquita. Finally, the district can look at repurposing title funds, Race to the Top, or local supplements. The CTF believes that a full sustainability plan should be built, but this completely depends upon program funding.

Guiding Principles: Notes of Consideration for the North Carolina State Legislature

1. Communication must be the first priority.
2. Transparency is important as many do not understand policy changes and/or performance-related strategic compensation.
3. Time must be spent overcoming past compensation efforts and feelings will be difficult (awkward)
4. If we are going to use data in evaluation and compensation, we must ensure data-linkages are correct
5. There needs to be a focus on increasing overall teacher base pay by \$10,000 in order to retain highly effective staff.

ENTER NOTES/GUIDING PRINCIPLES

CMS Design Team Comments

Erlene Lyde, Harding University High

“I was very impressed by the blended learning format that Battelle for Kids used to help us develop a strategic compensation plan for our district. Strategic compensation programs developed with intensive teacher involvement is necessary if they are to have any chance of being accepted by veteran teachers. Strategic compensation programs are very necessary if we are to grow the education profession and keep young, gifted teachers in the classroom longer. Young teachers are not going to wait 30 years to reach the top of the pay scale as I did. They are not going to be satisfied with not having the opportunity to utilize all of their talents in professional pursuits. The career ladder component will help young teachers visualize a future in education while helping them stay abreast of their peers in earning potential.”

Randolph Frierson, Stoney Creek Elementary

“The process of complete inclusion is the basic need of professional empowerment. The CMS strategic compensation task force was an excellent start toward building trust and buy-in from all public education constituents for CMS. I thoroughly enjoyed the empowerment of this process! One in which, while each member was free to express any concern, there was a level of professional honesty regarding challenges we face as a district and state in the way we look at professional compensation and tying it to our vision and mission as a community – as a district. The depth of research I/we were faced with examining lead each to a greater understanding – relieving our fears. However, we shall remain optimistic of the opportunity that our final product will serve well the students, teachers and community members, in attracting, retaining and compensating all members of the public education community in CMS and hopefully the state of NC.”

Monica Palmer, Ranson Middle

“This was an amazing opportunity to make a huge change within CMS. This is long overdue!”

Tamara Dial, J.M. Alexander Middle School

“Being involved in the development of this plan has been informative and enlightening. I am so glad that teachers are involved in this process.”

Mia Smith, Garinger High

“Participation in the CMS strategic compensation task force sessions afforded me the opportunity to be proactive in a compensation change process that is inevitable, and hard at best! I was inspired by the cooperative efforts of the culturally and professionally diverse colleagues whom tackled what promises to be a monumental shift from Education Professionals in the state of NC. I remain optimistic about the potential out-come, and the continued quest for pay equity for Education Professionals.”

Margaret Wittman, Garinger High

“I appreciated CMS bringing BFK to Charlotte to teach educators about differentiated/strategic compensation. Their leadership and facilitation allowed teachers to create a project to serve students and teachers.”

Sharika DuBose, Bruns Avenue Elementary

“This was an awesome experience. There was a ton of information given in order to develop and implement strategic compensation for CMS.”

Gayle L. Bohlen, South Meck High

“As an educator who loves to learn as well as teach others, my experience with Battelle for Kids was most positive. Serving on the CMS compensation task force was a learning experience for me and I am now prepared to share and “teach” my peers. I have to profess that the process we followed to create the compensation plan for CMS was intensive, open and straight forward. Every person had ample opportunities to question, debate, analyze and reflect. The end product is truly influenced by and molded by teachers (and a couple of principals). In spite of the fear produced by the words “employee compensation” we put forth effort to maintain fairness and flexibility in a teacher driven document.”

Charlene Wolford, James Martin Middle

“Battelle for Kids has offered a wealth of education, guidance and information. However, at no time did they attempt to take us in a direction we didn’t want to go in. Great job! This was a great experience. Thank you for your knowledge, patience and tolerance as we learned and moved toward a completed product! I loved the level of honesty and transparency offered during our work on the compensation plan. I learned more than I ever could have imagined. No matter what Raleigh chooses to do with our offering, having a voice has been phenomenal – Thank you! I started with no knowledge on compensation plans, but left with so much more than I expected. Thank you!”

Trina Potter, Ashley Park PreK-8

“Battelle has in no way caused me to make decisions I did not agree or believe in. This process has provided a pathway of growth and exposure to an arena I would have never learned about. The collaboration has brought unity and mutual respect among a community of educators with a common goal.”

“Emily’s facilitation has been exemplary. She has played an instrumental role in the success of this task force.”

Javonne Williams, Joseph W. Grier Academy

“Provided information and guidance to make an informed plan. Felt valued as a CMS employee and that my voice was heard.”

Joanna Schimizzi, David W. Butler High

“I personally grew from being part of a team composed of many teachers of varied experience, backgrounds and interests who joined together to collaboratively develop a proposal to further teacher professionalism and align teacher compensation to the goals of our profession.”

Alejandra Garcia, Pinewood Elementary

“I enjoyed the collaborative process, transparency and level of knowledge provided by Battelle for Kids. I think it is important to state that this compensation model was a collaborative effort. Created by a group of individuals that serve in different capacities within the district. This allowed teacher ownership and the opportunity to consider different perspectives.”

Kevin Strawn, East Meck High

“Battelle for Kids did an excellent job of educating and facilitating this diverse group of teachers through the process of developing a new compensation plan for CMS. Bravo!”

Katharine Bonasera, Hickory Grove Elementary

“The expertise of the Battelle for Kids team combined with the online learning modules significantly impacted by level of understanding ability to positively influence the development of our model. Participating in this compensations design process provided me a unique opportunity to influence the way the district compensates our teachers. I am excited to see our strategic compensation plan impact the way we coach and build capacity in our teachers. I am confident this shift will support our district goals and empower our teachers to take ownership of their career development thus positively impacting the social and academic achievement of our students.”

Michael Pillsbury, Randolph Middle

“What a pleasant experience. Guidance and support, exactly what we needed.”