

Consortium for
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Pay-for-Performance in North Carolina

An Updated Summary of Selected Strategic
Staffing Plans with Pay-for-Performance
Elements

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Pay-for-Performance: One Component of Strategic Staffing¹

Strategic Staffing

Strategic staffing at the Local Education Agency (LEA) level refers to a broad category of approaches to human resources allocation that *purposefully redistribute an LEA's more effective educators into its lower-performing schools.*²

Strategic staffing plans can include:

1. Staff movement within and across schools;
2. Introduction of additional responsibilities for selected educators (including differentiation of teacher roles through assignment of minor and mid-level leadership roles); and/or
3. Various pay differentiation reward and incentive schemes, including pay-for-performance plans.

The team evaluating North Carolina's Race to the Top initiatives³ uses three criteria to determine the comprehensiveness of an LEA's strategic staffing plan:

- (a) Does the plan **focus on low-performing schools** or student populations?
- (b) Does the plan **differentiate teachers** through some measure of their effectiveness? and
- (c) Does the plan **incorporate some type of incentive** to increase the number of more effective teachers in high-need schools?

Using these criteria, the Evaluation Team has identified over 70 North Carolina LEAs with strategic staffing plans that meet at least one of these criteria. Of those plans, 21 are comprehensive (i.e., they meet all three criteria above), and 18 of those include a pay-for-performance component.⁴ Total four-year spending on these plans has been about **\$76 million**.

Pay for Performance

Pay-for-performance—or *differentiated compensation based on one or more performance indicators*—is only one of several possible differentiated pay schemes used in strategic staffing plans; also common are plans that include pay for recruitment and/or pay for retention.

Inclusion of a pay-for-performance plan sometimes involves assessment of teacher effectiveness via analysis of classroom-level student academic outcomes, but it also can involve teacher

¹ Data and text for this brief are from the Consortium for Educational Research and Evaluation's report, *Local Strategic Staffing in North Carolina: A Review of Plans and Early Implementation* (http://cerenc.org/wp-content/uploads/2011/10/Strategic-staffing_1stYear-Report_-FINAL-09-24-2012.pdf) and its upcoming follow-up.

² A review of the literature from which this working definition was derived is included in an appendix.

³ The evaluation is being conducted by the Consortium for Educational Research and Evaluation–North Carolina (CERE–NC), a partnership of the SERVE Center at the University of North Carolina at Greensboro, the Carolina Institute of Public Policy at the University of North Carolina at Chapel Hill, and the Friday Institute for Educational Innovation at North Carolina State University: <http://cerenc.org>

⁴ Three other less-comprehensive plans also include a pay-for-performance component; see Table 2.

assessment via other quantitative measures (e.g., various grade- and/or school-wide student outcomes, such as graduation rates), qualitative measures (e.g., formal observation results), or combinations of these measures.

Strategic Staffing and Pay-for-Performance across North Carolina

This brief includes information about various strategic staffing plans across North Carolina.

- **Table 1 (p. 3)** outlines all of the ways in which strategic staffing currently is operationalized across the state.
- **Table 2 (pp. 4-5)** identifies (as of September 2013) LEAs across the state with strategic staffing plans—from the most complex to the most basic—as well as whether those plans are supported (in part or in whole) by Race to the Top funding. The table highlights plans with clear *pay-for-performance* elements.
- **Figure 1 (p. 6)** populates a map of the state with the same information. The map includes indications of whether an LEA’s plan(s) are supported by Race to the Top, as well as whether the LEA operates a federal School Improvement Grant (SIG)-funded plan that includes strategic staffing elements.
- The brief ends with descriptions of a sample of ***five comprehensive LEA-level strategic staffing plans (pp. 7-21)*** from across the state that either currently include or included in the recent past one or more *pay-for-performance* elements. Also included are short descriptions of the plans in place in Union and Rowan:

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Rowan-Salisbury Schools	p. 24
Union County Public Schools (A Two-Criteria Strategic Staffing Plan)	p. 25

A Note about State-Level Pay-for-Performance

In addition to the multiple local-level strategic staffing plans in operation across North Carolina, the state also has dedicated Race to the Top funds to a separate pay-for-performance initiative for the state’s lowest-performing schools. Through 2012-13, the funds have been used to provide incentives to all of a school’s staff when the school exceeds its overall performance goals. For the 2013-14 school year, the initiative will transition to an individual educator-level pay-for-performance plan at those schools. The Race to the Top evaluation team is conducting an evaluation of both phases of this initiative.

Table 1. Summary of Variations in Strategic Staffing Plans across North Carolina

Element	Approaches to Operationalization in NC LEAs
Focus on <i>High-Need Schools</i>	NC LEAs whose plans include this element currently identify schools as high-need based on one or more of these characteristics: <ul style="list-style-type: none"> • Measures of student socioeconomic characteristics; • Size of special needs population; • Teacher turnover rates; • NC ABCs Performance Composites and other measures of student achievement and/or growth; and/or • Judicial mandate
Focus on <i>Differentiation of Educator Effectiveness</i>	NC LEAs whose plans include this element currently differentiate teacher effectiveness using one or more of these data sources: <ul style="list-style-type: none"> • Student performance and/or growth (via value-added modeling or some other method); • Formal and informal educator evaluations; • Voluntary participation in optional school programs; and/or • Other qualitative measures (e.g., evidence of leadership, results of mandatory re-application for positions, etc.)
<i>Incentives</i> Offered in Support of a Focus on High-Need Schools and/or Teacher Differentiation	NC LEAs whose plans include this element currently provide incentives for one or more of the following reasons: <ul style="list-style-type: none"> • <i>Individual Educator Actions</i> <ul style="list-style-type: none"> ○ Development of exemplary teaching materials; ○ Willingness to move to a within-LEA target school; ○ Willingness to take on leadership roles; ○ Willingness to take on challenging teaching assignments; and/or ○ Participation in targeted professional development and/or additional coursework • <i>Individual Educator Performance</i> <ul style="list-style-type: none"> ○ Student performance and/or growth; and/or ○ Educator evaluation results • <i>Other</i> <ul style="list-style-type: none"> ○ Grade-level or school-wide student performance and/or growth (whole-grade or whole-school incentives, including incentives for non-certified staff); and/or ○ Recruitment/retention (sometimes in the form of housing support, equipment, etc.)

Table 2. Strategic Staffing Plans across the State, 2012 (**Bold** = plan with at least one pay-for-performance element)

Region	LEA Code	LEA	Strategic Staffing Criteria Met			LEA using RttT funding to support some/all plan(s)?	Total 4-Year Funding
			Identification of Effective Teachers	Incentives	Focus on High-Need Schools		
Plans Meeting All Three Criteria							
5	10	Alamance-Burlington	X	X	X	Yes	
6	40	Anson~"	X	X	X		
4	260	Cumberland~	X	X	X		
3	320	Durham~"	X	X	X		
5	340	Winston-Salem/Forsyth~	X	X	X	Yes	
6	360	Gaston~	X	X	X	Yes	
5	410	Guilford~	X	X	X	Yes	
3	420	Halifax~"	X	X	X	Yes	
7	490	Iredell-Statesville	X	X	X	Yes	
6	600	Charlotte-Mecklenburg~	X	X	X	Yes	
4	630	Moore~	X	X	X		
3	640	Nash-Rocky Mount~	X	X	X		
2	650	New Hanover~	X	X	X	Yes	
3	660	Northampton^"	X	X	X	Yes	
1	740	Pitt~	X	X	X	Yes	
4	770	Richmond~	X	X	X		
7	800	Rowan-Salisbury	X	X	X		
3	910	Vance	X	X	X	Yes	
3	920	Wake~	X	X	X	Yes	
1	940	Washington~	X	X	X		
2	960	Wayne~	X	X	X	Yes	
Plans Meeting Two Criteria							
7	50	Ashe	X		X		
4	90	Bladen	X		X		
2	160	Carteret	X		X		
8	220	Clay	X		X		
4	240	Columbus	X		X	Yes	
1	280	Dare	X		X		
5	290	Davidson	X		X		
5	291	Lexington City	X	X			
2	310	Duplin	X		X		
2	400	Greene~"		X	X		
1	480	Hyde	+		+		
6	550	Lincoln	X		X		
8	560	Macon	X		X		
8	570	Madison	X		X		
5	760	Randolph	X		X		
6	840	Stanly	X		X		
6	900	Union		X	X		
3	930	Warren"	X	X		Yes	
7	950	Watauga	X		X		
3	980	Wilson		X	X		

Criteria:

1. Does the LEA indicate that it attempts to determine or differentiate teacher effectiveness in some way?
2. Does the LEA's plan focus on high-need schools or on identified student needs, based on data?
3. Does the LEA offer – or plan to offer – incentives *clearly linked to other strategic staffing efforts*?

Notes:

* Plan with incentives only (no clear linkage to supporting high-need schools or to differentiating teachers by effectiveness); listed but not included in counts of strategic staffing plans

^ The Evaluation Team was unable to verify plan details

+ Plan only; no identified funding source(s)

~ LEA with strategic staffing elements in its SIG plan

" LEA working with RttT-funded Technical Advisor

† Incentives present, but not linked to LEA's other strategic staffing element(s)

Bold - Plan includes a pay-for-performance element

Table 2 (Cont.). Strategic Staffing Plans across the State, 2012 (**Bold** = plan with at least one pay-for-performance element)

Region	LEA Code	LEA	Strategic Staffing Criteria Met			LEA using RrtT funding to support some/all plan(s)?	Total 4-Year Funding
			Identification of Effective Teachers	Incentives	Focus on High-Need Schools		
<i>Plans Meeting One Criterion</i>							
7	120	Burke	X				
6	130	Cabarrus	X				
6	132	Kannapolis City	X				
7	140	Caldwell	X	+			
5	190	Chatham~			X		
1	210	Edenton-Chowan	X				
4	241	Whiteville City	X	†			
2	250	Craven			X	Yes	
5	292	Thomasville City"	X				
3	330	Edgecombe"			X		
3	350	Franklin	X				
8	380	Graham	X				
4	430	Harnett			X		
8	440	Haywood			X		
1	460	Hertford"			X		
7	181	Hickory City	X				
4	470	Hoke	X	†			
3	510	Johnston			X		
2	520	Jones	X				
1	580	Martin			X		
8	590	McDowell	X				
8	610	Mitchell	X				
2	690	Pamlico			X		
1	700	Elizabeth City-Pasquotank	X				
2	710	Pender	X				
8	810	Rutherford	X				
2	820	Sampson	X				
2	821	Clinton City	X				
5	850	Stokes			X		
8	870	Swain	X				
1	890	Tyrrell	X				
7	990	Yadkin			X		
<i>Other LEAs of Note</i>							
3	422	Weldon City**		X*			
4	530	Lee*		X*			
2	540	Lenoir*		X*			
4	780	Robeson"					
5	790	Rockingham*		X*			
7	860	Surry*		X*			
1	940	Washington"					

Criteria:

1. Does the LEA indicate that it attempts to determine or differentiate teacher effectiveness in some way?
2. Does the LEA's plan focus on high-need schools or on identified student needs, based on data?
3. Does the LEA offer – or plan to offer – incentives *clearly linked to other strategic staffing efforts*?

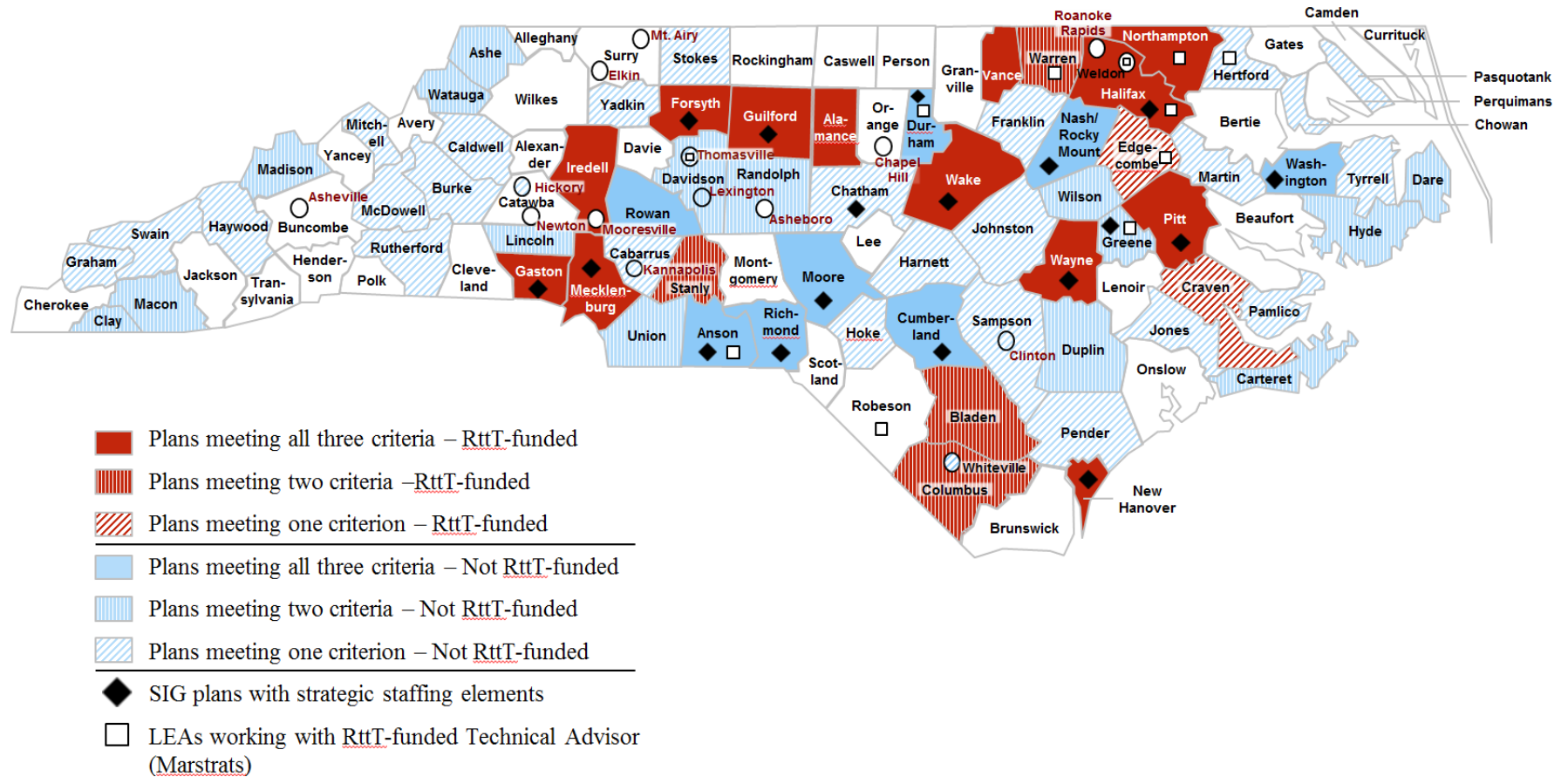
Notes:

- * Plan with incentives only (no clear linkage to supporting high-need schools or to differentiating teachers by effectiveness); listed but not included in counts of strategic staffing plans
- ^ The Evaluation Team was unable to verify plan details
- + Plan only; no identified funding source(s)
- ~ LEA with strategic staffing elements in its SIG plan
- " LEA working with RrtT-funded Technical Advisor
- † Incentives present, but not linked to LEA's other strategic staffing element(s)
- Bold** - Plan includes a pay-for-performance element

Figure 1. LEA-Level Strategic Staffing Plans, 2013

Criteria for LEA Plan Designation as Strategic Staffing:

1. The plan *differentiates teacher effectiveness* in some way.
2. The plan *focuses on high-need schools* or on identified student needs, based on data.
3. The plan offers – or plans to offer – *incentives* clearly linked to other strategic staffing efforts.



Note: LEAs with plans that include only an incentives component with no clear linkage to supporting high-need schools or to differentiating teachers by effectiveness are not identified in this figure. These LEAs are listed at the end of Table 1.

Highlighted Plans

Charlotte-Mecklenburg Schools

The Charlotte-Mecklenburg Schools (CMS) approach to building sustainable human capital capacity in high-need schools focuses on school leadership and leader retention as the keys to school turnaround.⁵ Principals in their first five years of leadership are provided with a layered series of school leadership-focused programs, including: the Queens University/McColl Educational Leadership Institute; consultant coaching; and strategic coaching for struggling principals. The LEA also addresses high-need school staffing and teacher development via a partnership with Teach for America and a federally-supported program called the New Teacher Project. In addition, in the past, CMS has provided signing bonuses and student achievement growth-based salary supplements via a Teacher Incentive Fund (TIF) grant (detailed below), but 2011-12 was the final year of this program.

1. Teacher Incentive Fund: LEAP (2007-08 through 2011-12)

CMS adjusted its TIF-funded merit pay plan each year. The first three years of the plan (2007-08 through 2009-10) included recruitment and performance-based bonuses, in addition to professional development-related stipends. For the final two years of the program (2010-11 and 2011-12), the LEA focused all of its resources on a more complex series of performance-based bonuses only. Each iteration is described in more detail below.

2007-08 through 2009-10: For the first three years of the program, teachers and principals were eligible for recruitment signing bonuses of \$10,000 for accepting positions in hard-to-staff, high-need schools, and teachers also were eligible for signing bonuses of \$8,000 for agreeing to teach hard-to-staff subjects (math, science, special needs, high school subjects with end-of-course exams). Stipends of \$115 per day were provided for professional development activities, or for assuming additional leadership responsibilities related to student achievement. Performance-based incentives changed each year as per-course Student Learning Objectives (SLOs, used to measure student growth in non-tested subjects) and teacher- and school-level Value-Added Measures (VAMs) were introduced in the LEA alongside extant state tests.

Year 1 (2007-2008)

- a. *Recruitment Bonuses.* \$10,000 signing bonus for teachers and principals who accept positions in hard-to-staff, high-need schools; \$8,000 signing bonuses for teachers who agree to teach hard-to-staff subjects
- b. *Stipends.* \$115/day, including benefits for attending approved professional development or assuming leadership roles and extra duties that are related to improving student achievement

⁵ For a more complete discussion of this plan, see: Travers, J., Christiansen, B., Institute, A., & Education, R. S. (2010). *Strategic staffing for successful schools: Breaking the cycle of failure in Charlotte-Mecklenburg schools*. Aspen Institute.

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- c. *Performance-Based Bonuses (based on EOG/EOC scores)*. Up to 15% of employee’s normal salary for High Growth and up to 10% for Better than Expected Growth

Year 2 (2008-2009)

- a. *Recruitment Bonuses*. \$10,000 signing bonus for teachers and principals who accept positions in hard-to-staff, high-need schools; \$8,000 signing bonuses for teachers who agree to teach hard-to-staff subjects
- b. *Stipends*. \$115/day, including benefits for attending approved professional development or assuming leadership roles and extra duties that are related to improving student achievement
- c. *Performance-Based Bonuses (based on Student Learning Objectives [SLOs])*. Bonuses paid as flat amounts of \$5,600 for principals, \$4,200 for assistant principals for facilitation, and \$1,400 for each SLO completed by teachers for a maximum of \$2,800

Year 3 (2009-2010)

- a. *Recruitment Bonuses*. \$10,000 signing bonus for teachers and principals who accept positions in hard-to-staff, high-need schools; \$8,000 signing bonuses for teachers who agree to teach hard-to-staff subjects
- b. *Stipends*. \$115/day, including benefits for attending approved professional development or assuming leadership roles and extra duties that are related to improving student achievement
- c. *Performance-Based Bonuses:*

Position	Criteria	Amount	Total
Principals	SLO Facilitation	\$1,000 (Tier 1) \$1,500 (Tier 2) \$2,000 (Tier 3)	Up to \$4,000
	School Growth (VAM)	\$500-\$2,000 (in top 40% of LEA)	
Assistant Principals	SLO Facilitation	\$750 (Tier 1) \$1,125 (Tier 2) \$1,500 (Tier 3)	Up to \$3,500
	School Growth (VAM)	\$500-\$2,000 (in top 40% of LEA)	
Teachers with EOC/EOG Test(s)	SLO Attainment	\$1400/SLO (2 required)	Up to \$5,300
	Classroom Growth (VAM)	\$500-\$2500 (in top 30% of LEA)	
Teachers without EOC/EOG Test(S)	SLO Attainment	\$1,400/SLO (2 required, 1 optional in lieu of Team Growth)	Up to \$4,200
	Team Growth	\$400- \$1,400 (in top 30% of LEA)	

2010-11 through 2011-12: For the final two years of the program, CMS eliminated the recruitment bonuses and daily stipends in favor of a complex performance-based incentives-only plan that took into account data from SLOs, school-level VAMs, and individual teacher VAMs. Under this revised plan, administrators could earn up to \$5,400 per year, and teachers could earn up to \$7,400 per year.

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Years 4-5 (2010-2011 and 2011-2012)

Position	Criteria	Amount	Total
Principals	SLO Facilitation	\$1,800	Up to \$5,400
	School Growth (VAM)	\$2,200-\$3,600 (in top 40% of LEA)	
Assistant Principals	SLO Facilitation	\$1,800	Up to \$4,700
	School Growth (VAM)	\$1,500-\$2,900 (in top 40% of LEA)	
EOG/EOC Teachers (Primary Instructors)	SLO Attainment	\$1,000/SLO (2 required)	Up to \$7,400
	School Growth (VAM)	\$1,000-\$2,400 (in top 40% of LEA)	
	Individual Growth (VAM)	\$2,000-\$3,000 (in top 30% of LEA)	
Shared-Instruction Teachers (Secondary Instructors)	SLO Attainment	\$1,000/SLO (2 required)	Up to \$6,400
	School Growth (VAM)	\$1,000-\$2,400 (in top 40% of LEA)	
	Team Growth (VAM)	\$1,000-\$2,000 (in top 30% of LEA)	
Non EOG/EOC Teachers	SLO Attainment	\$1,000/SLO (2 required)	Up to \$4,400
	School Growth (VAM)	\$1,000-\$2400 (in top 40% of LEA)	

2. *Strategic Staffing Initiative (Start Year: 2008-09)*

The CMS Strategic Staffing Initiative (SSI) combines a school principal talent search and recruitment process with ongoing support and a supplement/benefits pay plan. The talent search—which is part of a broader CMS Talent Pool Process for planning for principal succession—screens potential candidates for leadership positions at high-need schools. These potential candidates are identified by the superintendent, chief academic officer, and area superintendents as being potential change-leaders. They come from a pool that includes current CMS teachers who have demonstrated the potential for leadership, current CMS principals who have shown gains in student achievement that surpass a year’s worth of growth in a year’s worth of instruction, and others. Principals selected to participate are moved to a low-performing school, are allowed to select their assistant principals, literacy specialists, and behavior management experts, and are allowed to bring up to five staff members (who have also demonstrated effectiveness in increasing student achievement) with them; they also are allowed to dismiss current teachers who they consider to be disruptive to the development of a healthy and successful school culture. These principals receive priority attention from the CMS central office whenever issues are raised.

Differentiated incentives also are part of the plan. Principals, assistant principals, and literacy facilitators receive a 10% pay supplement to their base salaries, which also is factored into retirement. Teachers receive an initial recruitment bonus of \$10,000, plus retention bonuses of \$5,000 in the second and third years, for a total of \$20,000 in bonuses.

3. *The Federal School Improvement Grant (SIG) Program and Charlotte-Mecklenburg Schools*

Charlotte-Mecklenburg is using SIG funds to extend the lifespan of its TIF-LEAP model for the four schools identified for SIG support.

Winston-Salem/Forsyth County Schools

Winston-Salem/Forsyth County Schools (WSFCS) is in the process of aligning and coordinating systemwide three current programs that contribute to an overall strategic staffing plan: STAR³, Equity+, and Project ENRICH. Funding for the programs comes from RttT and other federal sources (as noted below). All three programs are part of WSFCS's two-year strategic plan, which focuses on (1) producing 21st century graduates and (2) providing effective teachers and principals. WSFCS also operates a federal School Improvement Grant (SIG)-funded program that includes aspects of strategic staffing.

In addition to these programs, WSFCS has committed to investigating factors that impact teacher and principal effectiveness, to be used in determining whether staff are currently equitably distributed and, if not, to move the LEA toward equitable distribution.

1. STAR³: Teacher Incentive Fund—Leadership for Educators' Advanced Performance (LEAP) 2 (2011-2016)

Awarded at the start of the 2010-11 school year (a planning year), the STAR³ (School Transformation by Actively **R**ecruiting, **R**etaining, and **R**ewarding) program is designed to support whole-school turnaround. The program is now in its third implementation year (2013-2014) and will run through 2014-15. It is funded by the federal Teacher Incentive Fund (TIF) and operates in 16 WSFCS high-need schools (12 elementary schools and 4 middle schools).

Participation in the program begins with a “360°” school-needs evaluation in consultation with the principal. The program then provides classroom observation and coaching, intensive professional development (both planned and on-demand), and instructional support for teachers and principals (via a Teacher Development Academy and an Executive Leadership Academy, respectively; both Academies are available to all WSFCS teachers and administrators). Also included are a staff development facilitator for each school and a new integrative software program for identifying data-driven student interventions.

The program includes a matched-pair incentive pay experimental component. Teachers in a randomly-chosen sample that includes six of the elementary schools and two of the middle schools are eligible for several levels of bonus pay; the other six elementary schools and two middle schools serve as matched comparison schools. Matches were based on school grade composition, school achievement level, and demographic similarities. Teachers in the performance pay schools are eligible to earn pay bonuses based on student growth as measured by the SAS EVAAS value-added model; growth-based grade-level and school-level bonuses also are available. Since there are no state tests for grades K-2, bonuses for these grades are determined based on results of the Iowa Test of Basic Skills (ITBS), which SAS has been able to include in its value-added modeling. Total compensation for an individual teacher can equal up to \$10,500 annually. All teachers in the matched comparison schools receive a flat 1% pay bonus for working in a targeted school. Teachers in all 16 schools are eligible for recruitment incentives and bonuses based on demonstrated leadership.

2. *Equity+ Schools*

WSFCS's Equity+ program identifies high-need schools with a minimum required proportion of free and reduced-price lunch students (75% or more at the elementary level and 50% or more at the middle and high school levels) and provides bonuses to teachers who agree to work in these schools. During the current calendar year (2012), the incentives program will move toward a performance-pay model (based on student growth measures) as WSFCS works to align all incentives programs across the LEA. Current Equity+ supports include on-demand professional development, as well as immediate feedback and support to teachers after observations.

3. *Project ENRICH (funded by a five-year Teacher Quality Partnership grant)*⁶

Based on the work of Betty Epanchin at the North Carolina Teacher Academy (and now of the University of North Carolina at Greensboro), Project ENRICH is a partnership with UNCG that provides highly-qualified lateral entry and traditionally licensed teachers for hard-to-staff areas (math, science, English as a second language, and exceptional children) in high-need WSFCS schools that are in the process of successful turnaround. Lateral entry candidates (of which there have been two cohorts—the first comprised of 12 candidates, and the current second cohort of 18) complete a compressed master's program (1½ years) and intern in an identified WSFCS school; then, if there are openings and the candidates are identified by their coaches, cooperating teachers, and program coordinators as suitable candidates, they are offered positions in a high-need school. Their commitment is at least three years. Eight of 12 members of the first cohort now work for WSFCS (a ninth was eligible but declined). In exchange, they are awarded an annual stipend (\$30,000) while completing the master's degree that can be used for personal expenses or to cover tuition costs. Lateral entry candidates spend four days a week in a public school classroom and a fifth day on campus at UNCG. In addition to the lateral entry candidates, 50 to 60 UNCG undergraduates also participate as part of their licensure programs, completing their student teaching internships in an identified WSFCS school.

4. *The School Improvement Grant Program and WSFCS*

WSFCS is using SIG funding to support extension of the educator effectiveness incentive component of their STAR³ program to one SIG school. In addition, a modified, whole-school and grade-level-only incentive plan for all staff is in place for the LEA's two other SIG schools, with additional incentives for principals at those schools based on Teacher Working Conditions and student and parent survey results. As noted earlier, the LEA is moving toward a common, LEA-wide incentive structure.

⁶ http://www.uncg.edu/soe/project_enrich/

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Winston-Salem/Forsyth County Schools: STAR³ Incentives Structure

Level	Administrators		Instructional Staff				Student Support Staff ^d	Admin & Operations Support Staff ^e
	Principal	Assistant Principal	Core Teacher ^a	Core Elem TA ^c	Non-Core Teacher ^b	Non-Core or MS TA ^c		
Level 1 – Whole School Performance EVAAS Campus Composite \geq 1.0 SE	\$500	\$500	\$500	\$500	\$500	\$500	\$500	\$500
Level 2 – Grade-Level Performance EVAAS Grade-Level Composite (one composite each for Grade K through 5) \geq 1.0 SE	\$750 per Grade	\$500 per Grade	\$3,000 ^g	\$750	\$3,000 ^g	\$750 ^g		
Elementary Level 3 – Teacher-Level Performance Teacher observations plus EVAAS Teacher Composite: Level A - \geq 0.5 SE Composite Level B - \geq 1.0 SE Composite Level C - \geq 1.5 SE Composite Level D - \geq 2.0 SE Composite			\$1,000	\$500				
			\$2,000	\$1,000				
			\$3,500	\$1,750				
			\$5,000	\$2,500				
Additional Bonus - Leadership Paid to effective teachers in selected leadership roles as defined by the STAR ³ District Team			\$2000		\$2000			
Maximum Potential Payout Per Employee	\$5,000	\$3,500	\$10,500	\$3,750	\$5,500	\$1,250	\$500	\$500

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Level	Administrators		Instructional Staff				Student Support Staff ^d	Admin & Operations Support Staff ^e
	Principal	Assistant Principal	Core Teacher ^a	Core Elem TA ^c	Non-Core Teacher ^b	Non-Core or MS TA ^c		
Level 1 – Whole School Performance EVAAS Campus Composite \geq 1.0 SE	\$500	\$500	\$500		\$500	\$500	\$500	\$500
Level 2 – Grade-Level Performance EVAAS Grade-Level Composite (one composite each for Grades 6, 7, and 8) \geq 1.0 SE	\$1,500 per Grade	\$1,000 per Grade	\$3,000		\$3,000 ^f	\$750 ^f		
Level 3 – Teacher-Level Performance Teacher observations plus EVAAS Teacher Composite: Level A - \geq 0.5 SE Composite Level B - \geq 1.0 SE Composite Level C - \geq 1.5 SE Composite Level D - \geq 2.0 SE Composite			\$1,000 \$2,000 \$3,500 \$5,000					
Additional Bonus - Leadership Paid to effective teachers in selected leadership roles as defined by the STAR ³ District Team			\$2000		\$2000			
Maximum Potential Payout Per Employee	\$5,000	\$3,500	\$10,500		\$5,500	\$1,250	\$500	\$500

Middle

^a Core Teacher includes Elementary grade level teachers (K-5), Middle School Math and Language Arts teachers, 8th grade Science teachers, EC teachers in self-contained classrooms teaching core subjects or in co-teaching classrooms, and primary reading teachers (PRTs) who are co-teaching. EC teachers in classrooms where less than 10 students take regular assessments are only eligible for Whole-School Performance bonuses.

^b Non-Core Teacher includes all teachers not listed above under Core Teacher, ENCORE teachers, curriculum coordinators, school-based instructional coaches, learning team facilitators, and media coordinators. For purposes of this pay plan, 6th and 7th Grade Science and 6th – 8th Grade Social Studies teachers are considered non-core, unless they are teaching one of the core areas defined above.

^c Core Elementary TA includes all Teacher Assistants in Core classrooms (as defined above); Non-Core TA includes all K-5 teaching assistants not included under Core TA (above) and all middle school Teacher Assistants.

^d Student Support staff includes guidance counselors, social workers, nurses, speech/language pathologists, home-school coordinators, school psychologists, EC case managers, pre-K teachers, pre-K assistants, media assistants, and technology coordinators.

^e Administrative & Operations Support Staff includes administrative assistants, secretaries, NCWISE managers, custodial staff, cafeteria managers, and cafeteria workers. Transportation staff (bus drivers, magnet stop assistants, traffic officers) are not included in the pay plan.

^f Bonus calculated based on percentage of time at each grade level.

Pitt County Schools

The Pitt County strategic staffing plan centers on development of a Teacher Leadership Cohort (TLC), which is designed to support small groups of highly effective teachers who volunteer to transfer to a lower-performing school. The original intent of the program was for groups of teachers who had worked together in the past to move together to a new school, but Pitt abandoned the cohort requirement in favor of increasing the number of teachers involved. The program was piloted on a small scale (4 or 5 teachers) at one school during the 2010-11 school year, and in school year 2011-12 expanded to include between 15 and 18 teachers (some of whom moved together as cohorts) who worked in six lower-performing schools.

Pitt currently identifies eligible teachers in tested subject areas only, and only teachers who have demonstrated 3 or 4 years of exceptional student growth (Pitt considers both raw growth measures and EVAAS-adjusted estimates, as well as supporting teacher evaluation data). Participating teachers identify up to three high-need schools to which they are willing to move, but final placement is made by Central Office staff.

School eligibility is determined based on two factors: a performance composite below 60%, and progress made toward achieving court-ordered unitary status measures (such as evidence of teaching experience that is reflective of the LEA's average). Pitt initially identified five such schools (all elementary or middle), with a sixth school identified for the 2011-12 school year.

Pitt County offers a varied menu of incentives to the TLC participants, which include two weeks of paid, targeted professional development over the summer, an iPad, and the opportunity to move their children to the schools to which they transfer, in addition to a more traditional stipend (\$3,000) for making the move. Based on learnings from the pilot year that staff in identified schools were hesitant to embrace and integrate TLC teachers into their new school's culture, the summer professional development experience now includes a focus on helping TLC teachers learn how to develop and maintain professional relationships in their new schools.

The School Improvement Grant Program and Pitt County Schools

The Pitt County SIG plan is in operation in three schools. The strategic staffing components of the plan include school- and individual-level pay-for-performance incentives, as well as provisions for staff removal.

The incentives plan is complex, offering all certified and non-certified staff multiple opportunities to earn performance pay as a result of meeting or exceeding expectations in areas such as personal attendance, willingness to teach hard-to-staff courses, whole-school performance in both achievement and graduation rates, and individual effectiveness (as measured by the state's ABCs criteria as well as by EVAAS-derived measures of value added). Cumulative awards can be as high as \$10,750.

Under the SIG, Pitt County also can expedite removal of staff who do not demonstrate proficiency and evidence of contributing to student growth, as measured by the state Teacher Evaluation Process.

Performance Pay Plan for Pitt County SIG Schools

Role	Attendance Goal	Class Differentiation	Campus Progress Award (school-wide)	Teacher Progress Award (EOC)	Teacher Progress Award CTE/Health Sciences Post-Assessment	Teacher Effect Award (EVAAS)	Maximum Possible
Administration	\$200/sem		\$2,000				\$2,400
9-12 Teachers	\$200/sem		\$700				\$1,100
CTE Teachers	\$200/sem		\$700		\$500		\$4,100
EOC Teachers	\$200/sem		\$700	\$7200		\$500	\$8,800
Language/Intro Math Teachers	\$200/sem	\$250/class	\$700	\$7200		\$500	\$10,750
Certified Instr. Support	\$200/sem		\$700				\$1,100
Teaching Assistant	\$200/sem		\$500				\$900
Clerical/Custodial	\$200/sem		\$500				\$900
Cafeteria/Bus Driver	\$200/sem		\$200				\$600
Criteria:	2 absences or less per semester	At-risk classes	Either: 1) AYP achieved; 2) ABCs designation of “High Growth”; and/or 3) Graduation rate >75% and/ or +3% over previous year.	Minimum of 75% of students taught show growth \$1200/class; \$2200/Lang./Intro. Math class	Minimum of 85% of students taught are proficient or credentialed \$500/class	Value-Add (EVAAS estimate) by teacher \$500 for positive in green zone	

Notes:

- To be eligible for performance payment, employee (a) must not have missed more than five student instructional days/semester, (b) must be employed at the end of the school year, and (c) must achieve a minimum rating of “Proficient/At Standard” on all evaluation measures
- To receive the EVAAS award, the teacher must have been employed in the SIG school the previous year
- “Growth” means that a student meets or exceeds her or his predicted/expected score on EOC exams for face-to-face classes for the teacher of record

Guilford County Schools

Guilford County's strategic staffing initiative—Mission: Possible—has been in operation since the 2006-07 school year, and from 2007 forward has been supported by a federal TIF grant, which was awarded again in 2010. The LEA is using some of its RttT allotment to support the program.

Mission: Possible includes a performance-based compensation system designed to recruit highly-effective educators to any of 44 identified schools designated as high-need (based on student poverty, teacher turnover, and school performance) and, once hired, to retain them in those schools. Teachers and administrators at Mission: Possible schools have access to specialized training and resources, and they are eligible for performance incentives that are tied to value-added estimates.

Three different incentives programs—the Original program from 2006-07 (**O**),⁷ the Incentives program (**I**), and the Bonus program (**B**)—are now available for teachers and principals, with each tied to a different set of schools. The two newer programs (the Incentives and Bonus programs) were created as part of an experimental design to attempt to determine whether one approach is more successful than another at supporting gains in student performance. Currently available incentives for each program⁸ include:

- *Recruitment Incentives*: Awarded to teachers with evidence of high estimates of the value they add to their students' learning (often referred to as value-added scores; \$5,000)—**O, I, B**
- *Hard-to-Staff Incentives*: Awarded to teachers in hard-to-staff subject areas (\$2,500-\$5,000)—**O, I, B**
- *Performance Incentives*: Individual teachers are eligible to receive graduated performance incentives based upon value-added measures (\$2,000-\$12,000). In addition, entire school staff (including administrators) are eligible to receive graduated performance incentives based on school-wide value-added data (\$750-\$1,500; \$15,000 for administrators)—**O, I**
- *Leadership Incentive*: Individual teachers are eligible for recognition of their leadership in helping colleagues to increase student achievement (\$2,000)—**I, B**
- *School Supplement Bonus*: A flat 1% of salary is added to the pay of all certified and non-certified staff at schools with this incentive option—**B**

Historical and current Mission: Possible incentives structures appear on pages 18 through 20.

The School Improvement Grant Program and Guilford County Schools

Guilford County Schools is using SIG funds to support staffing efforts at three schools. At each school, all staff will be required to re-apply for their positions, with no more than 50% eligible

⁷ The Original program started as a locally-funded program for 22 schools, and then grew to 30 schools when Guilford was awarded its first TIF grant in 2007. When that first TIF grant ended, Guilford kept the Original program in place but modified it to prioritize performance-based incentives and de-emphasize recruitment incentives.

⁸ http://www1.gcsnc.com/depts/mission_possible/pay.htm

for rehire. A new staffing protocol includes the identification and recruitment of highly-qualified staff from other Guilford County schools who: exhibit evidence of high value added (via EVAAS); meet the expectations detailed in the LEA's Interactive Computer Interview System⁹ screening process; and exceed expectations in team interviews¹⁰ and observations of a lesson in the candidate's area of certification. Qualified candidates receive recruitment bonuses and are eligible for performance incentives (based on annual measures of value added via EVAAS); they also are offered extended employment agreements. Incentive structures vary across the three schools.

⁹ This computer-assisted interviewing process is designed to measure the skills and knowledge of prospective teachers. The tool was developed by the American Association of School Personnel Administrators: <http://www.aaspa.org/publications/product/4/>

¹⁰ Interviews include representatives from the school and from the LEA.

Guilford County Schools: Mission: Possible Incentives Structure¹¹

1. Original Incentive Structure

Add it up:	Incentive	Principals	Secondary Math	EC: OCS or Adaptive, 6-8 Science, Physics, Chemistry	3-5 Classroom Teachers, 6-8 LA, English I, US History, Civics & Economics, Biology	All Other Licensed Faculty	Classified Staff
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Recruitment Incentives

<i>Start with</i>	High VAD Recruitment Incentive	N/A	\$5,000	N/A	\$5,000	N/A	N/A
+	Hard-to-Staff Position Incentive	\$5,000	\$5,000	\$5,000	\$2,500	N/A	N/A

Individual VAD Performance Incentives (You must have VAD to qualify)

+	Level 4 VAD	N/A	\$4,000	N/A	\$2,000	N/A	N/A
<i>or</i> +	Level 5 VAD	N/A	\$12,000	N/A	\$6,000	N/A	N/A

School-wide VAD Performance Incentive

+	Above (Coded in Green)	\$15,000	\$1,500	\$1,500	\$1,500	\$1,500	\$750
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Salary Bonus

N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A
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Leadership Incentives

N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A
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Total Incentives

=	Minimum Incentives	\$5,000	\$5,000	\$5,000	\$2,500	\$0	\$0
=	Maximum Incentives	\$20,000	\$23,500	\$6,500	\$15,000	\$1,500	\$750

Participating Schools: Murphey Traditional Academy, Sedgefield Elementary, Archer Elementary, Rankin Elementary, Vandalia Elementary, Sumner Elementary, McLeansville Elementary, Kiser Middle, Guilford Middle, Eastern Middle

¹¹ Adapted from: http://www1.gcsnc.com/depts/mission_possible/

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2. Incentives Plan Structure

Add it up:	Incentive	Principals	Secondary Math	EC: OCS or Adaptive, 6-8 Science, Physics, Chemistry	3-5 Classroom Teachers, 6-8 LA, English I, US History, Civics & Economics, Biology	All Other Licensed Faculty	Classified Staff
<i>Recruitment Incentives</i>							
<i>Start with</i>	High VAD Recruitment Incentive	N/A	\$5,000	N/A	\$5,000	N/A	N/A
+	Hard-to-Staff Position Incentive	\$5,000	\$5,000	\$5,000	\$2,500	N/A	N/A
<i>Individual VAD Performance Incentives (You must have VAD to qualify)</i>							
+	Level 4 VAD	N/A	\$4,000	N/A	\$2,000	N/A	N/A
<i>or</i> +	Level 5 VAD	N/A	\$12,000	N/A	\$6,000	N/A	N/A
<i>School-wide VAD Performance Incentives</i>							
+	Above (Coded Green)	\$15,000	\$1,500	\$1,500	\$1,500	\$1,500	\$750
<i>Salary Bonus</i>							
N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A
<i>Leadership Incentives</i>							
+	Teacher Leader (6 per school)	N/A	\$2,000	\$2,000	\$2,000	\$2,000	N/A
<i>Total Incentives</i>							
=	Minimum Incentives	\$5,000	\$5,000	\$5,000	\$2,500	\$0	\$0
=	Maximum Incentives	\$20,000	\$25,500	\$8,500	\$17,000	\$3,500	\$750

Participating Schools: Peck Elementary, Frazier Elementary, Hunter Elementary, Allen Jay Elementary, Brightwood Elementary, Bluford Science Technology Engineering and Mathematics Academy, Montlieu Elementary Academy of Technology, Jamestown Middle, Southern Middle, Northeast Middle

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3. Bonus Plan Structure

Add it up:	Incentive	Principals	Secondary Math	EC: OCS or Adaptive, 6-8 Science, Physics, Chemistry	3-5 Classroom Teachers, 6-8 L.A., English I, US History, Civics & Economics, Biology	All Other Licensed Faculty	Classified Staff
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Recruitment Incentives

Start with	High VAD Recruitment Incentive	N/A	\$5,000	N/A	\$5,000	N/A	N/A
+	Hard-to-Staff Position Incentive	\$5,000	\$5,000	\$5,000	\$2,500	N/A	N/A

Individual VAD Performance Incentives (You must have VAD to qualify)

N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A
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School-wide VAD Performance Incentives

N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A
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Salary Bonus

+	1% of Salary	1% of Salary	1% of Salary	1% of Salary	1% of Salary	1% of Salary	1% of Salary
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Leadership Incentives

+	Teacher Leader (6 per school)	N/A	\$2,000	\$2,000	\$2,000	\$2,000	N/A
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Total Incentives

=	Minimum Incentives	\$5,000 + 1% of Salary	\$5,000 + 1% of Salary	\$5,000 + 1% of Salary	\$2,500 + 1% of Salary	1% of Salary	1% of Salary
=	Maximum Incentives		\$12,000 + 1% of Salary	\$7,000 + 1% of Salary	\$9,500 + 1% of Salary	\$2,000 + 1% of Salary	

Participating Schools: Bessemer Elementary, Cone Elementary, Fairview Elementary, Falkner Elementary, Foust Elementary, Gillespie Park, Hampton Academy, Kirkman Park Elementary, Oak Hill Elementary, Parkview Elementary, Washington Montessori, Wiley Elementary, Union Hill Elementary, Allen Middle, Ferndale Middle, Jackson Middle, Hairston Middle, Welborn, Andrews High, Dudley High, Eastern High, High Point Central, Smith High, Southern High

Wake County Public School System

1. Project Renaissance

At the beginning of the 2009-10 school year, the Wake County Public School System (WCPSS) identified four high-need schools to participate in a strategic staffing program called Project Renaissance. Project Renaissance provides several incentives to encourage highly-effective teachers to move to one of these schools, including recruitment bonuses and performance bonuses. A teacher's eligibility for the performance bonus is based on demonstrated growth on the state's teacher evaluation instrument, whole-school growth, and, for teachers of tested subjects, classroom-level growth.

The four schools were identified based on their composite scores, all of which were below 60%. A fifth school, which was a new school in 2011-12, also has been identified for support similar to the support provided to the Project Renaissance schools, based on what its composite score would have been, had its students been in attendance at the school in the previous year.

2. Targeted Recruitment Partnerships with Institutes of Higher Education

In addition to its targeted strategic staffing work, WCPSS also is investigating ways to expand its recruitment pool. Currently, the LEA maintains a relationship with the teacher preparation program at Slippery Rock University (in Pennsylvania) whereby students in that program complete internships in Wake County schools. In support of its focus on recruiting a teacher corps that reflects the LEA's student body, the LEA is attempting to establish similar relationships with several historically black colleges and universities (HBCUs) in the hopes of increasing the size of its pool of minority teacher candidates.

3. The School Improvement Grant Program and WCPSS

WCPSS is using SIG funding to support extension of the teacher effectiveness incentives included in its Project Renaissance School program as part of its plan for its SIG school.

Rowan-Salisbury Schools

A comprehensive strategic staffing plan for Henderson Independent High School was funded by the federal School Improvement Grant (SIG) program for the 2012-13 school year. After that year (the final year of their three-year SIG grant), Rowan-Salisbury continued the program for school year 2013-14 with support from federal Title I funds.

The incentive plan is used partially to retain current teachers but also to attract teachers to the school. Some incentives are awarded based on performance results (EVAAS growth measures and EOC performance measures):

For the 2011-13 school years, in accordance with federal and state provisions, an incentive pay plan will be put into place for recruiting and retaining the very best teachers and leaders possible. This pay plan will have two parts, the first part will be awarded to certified and classified staff just for agreeing to teach at this impacted hard to staff school. The second part of the pay plan will be “pay for performance” in scope and will be created with input from school staff.

For the 2012-13 school year, the cost of the program was budgeted at \$200,000.

Union County Public Schools (A Two-Criteria Strategic Staffing Plan)

Since 2002, Union County Public Schools has provided a \$1,500 supplement to teachers who agree to teach full-time in one of the LEA's high-priority schools. Schools are designated as high-priority when the proportion of free and reduced-price lunch students at the school is at or above 50%. As the LEA has grown, the number of high-priority schools also has risen; in the 2011-12 school year, teachers in 14 of the 52 Union County schools were eligible.

Union's Human Resources Division also uses the supplement as one of several recruitment tools at job fairs it sponsors that are designed specifically to recruit applicants for positions in its high-priority schools.¹² In addition to the supplement, prospective teachers are given tours of the schools, and the Division prepares special information packets about the schools. Awarding of the supplement is not based on measures of teacher impact on student achievement, however.

In addition, Union County works to maintain staff continuity at its high-priority schools by limiting the annual number of staff who are eligible for transfer from those schools to other schools in the LEA. Once assigned to a high-priority school, a teacher must teach there for three years before becoming eligible for a voluntary transfer. The LEA believes that this policy has helped to ensure continuity in instructional practice and design at the high-priority schools, as indicated by increases in academic growth on state and local assessments.

¹² The LEA notes that these job fairs have declined in number in recent years in response to challenging economic conditions.

Appendix: Defining Strategic Staffing

Many states and school systems implement school improvement plans that include some mix of staffing strategies to support those plans, but there is no commonly-accepted delineation of the key elements of a comprehensive strategic staffing plan. The range of uses of the term is still quite broad and is applied to simple incentive-based plans as well as to more complex, multi-tiered plans that involve mass movements of entire school staff. A review of the literature reveals an emerging set of common components that collectively help to inform the definition of a comprehensive strategic staffing plan that is used throughout this brief.

The first and longest-standing of these components is the inclusion of some sort of financial incentive to recruit educators. Several states and districts have long offered some type of modest bonus for new teachers (Liu, Johnson, & Peske, 2004), and Massachusetts even implemented a healthy \$20,000 signing bonus in 1998 to address shortages in the supply of quality teachers (Liu, Johnson, & Peske, 2004). Though incentives of this type often have less impact than hoped for (e.g., Hanushek, 1997; Johnson, Berg, & Donaldson, 2005), there is some evidence that they can support the intended goals. For example, Figlio (2002; cited in Johnson, Berg, & Donaldson, 2005) found that differential salary adjustments in adjacent districts led to differences in the quality of teachers attracted, as measured by academic degrees from selective colleges and majors in teaching field. Similarly, Ballou and Podgursky (1995) demonstrated that increases in teacher pay targeted to higher-ability teachers (based on student test scores) are likely to result in an increase in the number of those candidates who choose to teach.

But incentives alone do not constitute a fully-realized strategic staffing plan. In recent years, a second common component has emerged: the linkage of incentives to specific staffing needs, such as filling vacancies in hard-to-staff subject areas, recruiting and retaining more effective teachers, and addressing deficiencies in both of those areas in high-needs schools. In their examination of human capital resource allocation in the Boston Public School system, the National Council on Teacher Quality (2010) stressed the importance of incentivizing effective teachers to work at high-needs schools. Since 1995, North Carolina has experimented with several different targeted educator incentives, from offering substantial financial support for pre-service teachers who license in high-need subjects (Stallings, 2007) to funding differentiated pay for teachers who agree to work in those subject areas or in targeted schools (Clotfelter et al., 2006). For example, between 2001 and 2004, North Carolina supported a differentiated pay supplement that provided an \$1,800 bonus to all middle and high school math, science, and special education teachers who taught in schools that served either low-income or low-performing students, or both (Clotfelter et al., 2005). In 2006, the North Carolina General Assembly approved an allocation for a pilot program that awarded salary supplements of \$15,000 to up to ten early-career teachers who agreed to teach math or science in one of three participating districts (Bertie, Columbus, and Rockingham Counties; General Assembly, 2006). While outcomes from some of these programs suggest limits to the degree to which financial incentives alone can impact recruitment and enhance teacher capacity,¹³ they do serve to

¹³ For instance, participation in the \$15,000 pilot was low, with only eight teachers accepting positions in only two of the three target LEAs (Hines & Mathis, 2007). In addition, Bacolod (2007) concluded that, while salary can affect teachers' decisions to choose teaching as a career, working conditions (as distinguished by variation in the

demonstrate how strategic staffing has started to move beyond simple bonus pay and supplemental salary plans.

A natural evolution of both of these components has been their inclusion in more comprehensive human resources allocation plans that are themselves embedded in larger, whole-school reform efforts. As early as 1998, Miles and Darling-Hammond were able to describe several examples of human capital reallocation strategies (including the reorganization of teachers) to support instructional goals and overall reform efforts, and there also have been notable local human resources allocation experiments in North Carolina that extend beyond simple, incentive-based recruitment plans—many of which are described in the main body of this brief.

It is from this more complex approach to human resources allocation—the *purposeful redistribution of an education unit's* (a school's, an LEA's, or a state's) *current allotment of educators to best meet the needs of the education unit*—that the criteria used to identify strategic staffing plans for the purposes of this brief are derived: a) Does the plan focus on low-performing schools or student populations? b) Does the plan differentiate teachers through some measure of their effectiveness? and c) Does the plan incorporate some type of incentive to increase the number of more effective teachers in high-need schools?

It is important to note that these criteria are designed to allow for flexibility in identifying their presence in an LEA's strategic staffing plan. For example, support for strategic staffing was included in the RttT proposal in part to encourage development of *local context-sensitive* strategies for strategically deploying human capital to places where it is needed most, not to dictate a one-size-fits-all approach for every locale. The criteria above attempt to provide a uniform approach to identifying comprehensive strategic staffing plans, but at the same time, by not specifying how an LEA operationalizes each criterion, they honor the importance of allowing LEAs to develop plans that are unique to their settings.

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