

Proposed Second Amendment to the
2016-2017 301 Pay For Performance
Plan

Reconvened 301 Committee 2016-2017 Plan

301 Committee Members

Jason Freed, TEA President

August Merz, Middle School Teacher

Margaret Chaney, High School Teacher

Dan Ireland, Middle School Teacher

Tim Batten, High School Teacher

Tamara Christopherson, Elementary Principal

Brian Lambert, K8 Principal

Dr. Daniel Schulter, Middle School Principal

Roberto Estrella, High Schools

Richard Foster, Facilitator

Karla Soto, Finance

Purpose for the amendment

The purpose of this “Second Amendment” is to address treatment of any Fund 12 funds from the Classroom Site Fund which are:

- received for the 2016-2017 budget year, and
- remain in Fund 12 after the agreed to plan components have been funded.

Spring 2016

- District and TEA 301 Joint Committee identified the carry forward.
- Carry forward was taken into consideration when developing the 2016-2017 301 Pay for Performance Plan
- The 2016-2017 Plan amount was increased from \$1500 (2015-2016) to \$3000 (2016-2017).
- If this approach is used by future Joint Committees, the carry forward would gradually be paid down through the life of 301 (2020-2021).
- 2016-2017 was ratified with 81.8 % approval and Governing Board approved the plan on June 14, 2016

Fall 2016

- Discussion resurfaced during monthly finance presentation at Governing Board meetings (September and October)
- The District and TEA developed a plan of action

Fall 2016

- TEA held forums to gather feedback from the employees on options to address the surplus.
 - November 2 –Catalina HS
 - November 5 – Rincon HS
 - November 7 Palo Verde HS
- The 301 District and TEA Joint Task Force reconvened to address the surplus. (November 17)
- The District presented 301 information to Superintendent's Focus Group: Finance, Joint Committee Process, current plan, and Legal. (November 17)
- The 301 District and TEA Joint Task Force sent a survey with information and three options to current 301 eligible employees to gather more feedback on which option should be reviewed by the joint task force. Respondents were asked to rank three options in order of their preference. (November 23-29)

Fall 2016

- Survey results were reviewed by the joint task force and the proposed amendment was drafted to the current 301 Pay for Performance Plan. (December 1)
- The proposed amendment was sent out to current 301 eligible employees for 70% ratification per state statute 15-977. (December 6-10)
- First Amendment was ratified with 73.6% approval and Governing Board approved on December 13, 2016.
- On December 13, 2016, the Governing Board gave a directive to the Superintendent to spend down Classroom Site Fund 12 during the 2016-2017 plan year.

Spring 2017

- The 301 District and TEA Joint Task Force reconvened to address the directive.
- The proposed second amendment was sent out to current 301 eligible employees for 70% ratification per state statute 15-977 (February 6-11)
- Governing Board approved a motion affecting 2016-2017 301 Pay for Performance Plan.

Governing Board Motion

- "I move that, for the current school year only, an exception be made to Policy GCO with respect to the application of the policy under the Proposition 301 Performance Pay Plan. More specifically, I move that an alternative determination of performance classifications be made for teachers for the current year and that this alternative determination be used to compute Prop 301 performance pay. I further move that this alternative determination of evaluation classification be made on the basis of the evaluation scores that were specified in Policy GCO and which were in effect prior to the August 9, 2016 revision of the policy, because such scores were in effect at the time the 2016-2017 301 performance pay was first approved by the Governing Board and was approved by the District's teachers. Finally, I further move that this alternative performance classification determination only be used for calculating 2016-2017 performance pay and that performance classification for any other purpose be made in accordance with Policy GCO as revised on August 9, 2017."

Dr. Stegeman

Proposed Second Amendment

The 2016-2017 301 Pay for Performance Plan, as amended on December 13, 2016, is hereby amended to include the following provision:

If any funds remain in Fund 12 of the Classroom Site Fund after the Pay for Performance Stipends identified in Article IV(B)(a) are fully paid, TUSD may retain up to five percent (5%) of the state's pay for performance allocation to TUSD for the 2016-2017 budget year to address potential 301 claims/appeals for SY 2016-2017 and distribute monies left from that five percent through the 2017-2018 301 Plan. Any money remaining from the 2016-2017 Fund 12 in excess of that five percent (5%) shall be distributed no later than the end of February 2018, on a pro rata basis, using each participant's 2016-2017 teacher evaluation classification.

All other provisions of the 301 Pay for Performance Plan, as amended on December 13, 2016, remain in full force and effect.

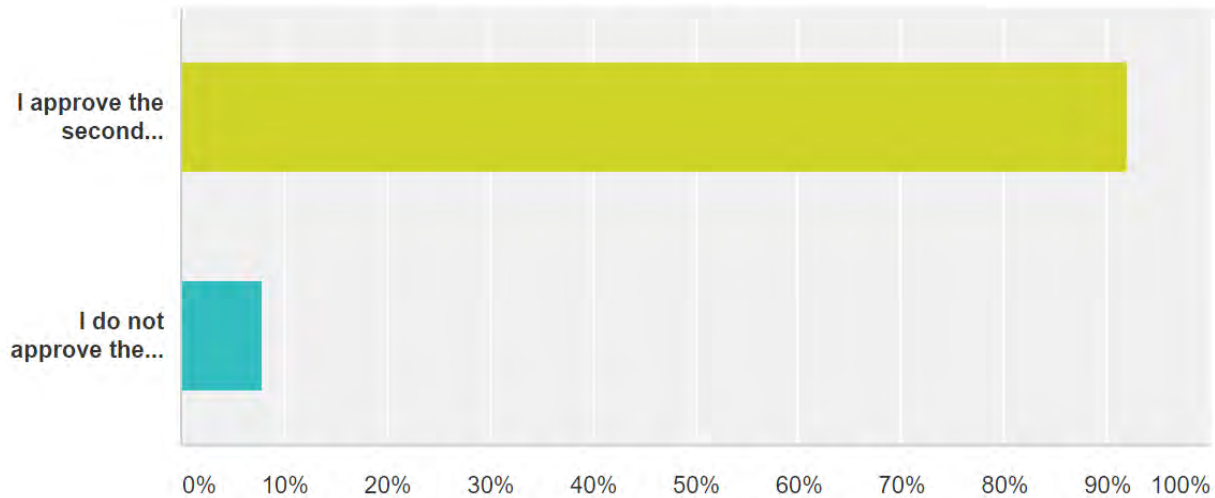
Payment Schedule

The Second Amendment is attached to the 2016-2017 Pay for Performance Plan.

- May 2017 (current 2016-2017 Plan 1st payment)
- July 2017 (First Amendment)
- December 2017 (current 2016-2017 Plan 2nd payment)
- February 2018 (Second Amendment)

Please vote to approve or not approve the Second Amendment to 2016-2017 301 Pay for Performance Plan

Answered: 2,100 Skipped: 0



Answer Choices	Responses
I approve the second amendment (This will allow any funds in excess of the 5% retention for claims/appeals to be distributed after the both components of the 2016-2017 301 Pay for Performance Plan have been paid)	92.14% 1,935
I do not approve the second amendment (This will require the Joint Task Force to reconvene to propose a new plan to address the Governing Board directive to Dr. Sanchez.)	7.86% 165
Total	2,100

Ratification

- February 6-11 via Survey Monkey

Eligible employees	2676
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Votes needed for ratification (70%)	1874
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Yes Vote	1935
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No Vote	165
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No Response	564
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Approval of the performance based compensation system based on an affirmative vote of at least seventy per cent of the teachers eligible to participate in the performance based compensation system.

Percentage	72.3%
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(Yes Vote / Eligible)

1935/2676