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Local Strategic Staffing in North Carolina

A Review of Plans and Early Implementation

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Table of Contents

Executive Summary	3
Introduction.....	5
Purpose, Data, and Methods	7
Purpose of this Report	7
Research Questions and Definitions.....	7
Relevant Overall Research Questions for Teacher and Leader Supply and Distribution	7
Questions Specific to Local-Level Strategic Staffing.....	8
A Working Definition of Local-Level Strategic Staffing	8
Data.....	9
Methods	9
Overview of Local Strategic Staffing Efforts in North Carolina.....	11
Local Strategic Staffing Plans	11
Related Strategic Staffing Efforts.....	11
Recruitment Support for District and School Transformation Districts	11
Other Federal Grants—Teacher Incentive Fund and School Improvement Grants.....	13
Descriptions of Selected Comprehensive Strategic Staffing Plans.....	14
Selected Comprehensive, RttT-Supported Plans.....	15
Winston-Salem/Forsyth County Schools	15
Guilford County Schools.....	17
Iredell-Statesville Schools.....	18
Charlotte-Mecklenburg Schools.....	19
Pitt County Schools.....	20
Vance County Schools	21
Wake County Public School System.....	22
Selected Comprehensive, Non-RttT-Funded Plans.....	22
Burke County Schools.....	23
Cumberland County Schools.....	23
Durham Public Schools.....	24
Gaston County Schools	25
Nash-Rocky Mount Schools.....	25
Conclusions, Limitations, and Next Steps	26
Conclusions	26

Limitations.....	26
Next Steps.....	27
LEA-Level Strategic Staffing Site Selection	27
Summary of Upcoming Evaluation Work.....	27
Appendix A. State Strategic Staffing Voucher	28
Appendix B. LEA-Level Strategic Staffing Plans	31
Appendix C. Race to the Top-Funded Technical Assistance for Teacher Recruitment and Retention.....	33
Appendix D. Other Examples of Comprehensive Plans.....	35
Appendix E. Examples of Notable Plans that Meet One or Two Criteria	39
Appendix F. Examples of LEA Incentives Plans.....	43

LOCAL STRATEGIC STAFFING IN NORTH CAROLINA: A REVIEW OF PLANS AND EARLY IMPLEMENTATION

Executive Summary

Education experts and researchers agree that effective teachers are critical to the academic success of students, but all too often, students who struggle the most do not have access to effective teachers. Concern about the uneven access of low-performing, poor, and minority students to effective teachers is a foundational component of the United States Department of Education's Race to the Top (RttT) program, which encouraged applicants to propose ways in which states could work to counter this persistent trend. In response, North Carolina's proposal offered several state-level initiatives for achieving a more equitable distribution of effective educators statewide, including support for locally-developed strategic staffing plans, or plans that *aim to distribute an education unit's more effective educators¹ into its lowest-performing schools.*

Many of the individual Detailed Scopes of Work (DSWs) crafted by Local Education Agencies (LEAs) to demonstrate how they will use RttT funds to support RttT goals outline strategies for maintaining or developing strategic staffing plans. An overriding goal of the evaluation of these LEA-level strategic staffing plans is to determine whether and to what extent they collectively or individually contribute to an increase in the presence of effective teachers in the lowest-performing schools in LEAs with these plans. Specifically, the intent of this evaluation is to:

- Identify, classify, and describe all LEA-level strategic staffing initiatives in operation across the state that support RttT goals (whether funded in whole or in part by RttT, or by some other source or sources);
- Provide qualitative and, where possible, quantitative assessments of the impact of RttT-supported staffing initiatives on outcomes related to the distribution of effective teachers in low-performing schools;
- Provide evidence for policy makers and other stakeholders that they can use to improve the design and implementation of these plans; and
- Provide recommendations for continuation, expansion, or termination of these plans at the conclusion of the RttT period.

This report begins the process of assessing the impact of local strategic staffing plans on moving individual LEAs toward a more targeted and thoughtful distribution of their most effective educators, as well as the advisability of continuing these plans at the end of the RttT period. The report provides a categorized overview of all of the plans proposed in the LEA DSWs, as well as a detailed description of the most comprehensive of these plans.

Also included is initial information about a state-supported but locally-focused strategic staffing strategy: the provision of technical assistance to selected LEAs to support their development of targeted recruitment and retention strategies.

¹ For this report, effectiveness is broadly defined as any measure that differentiates educator impact on students.

Criteria for Identifying Comprehensive Strategic Staffing Plans

Three criteria were developed from a review of available literature and extant examples of strategic staffing initiatives to aid in the identification of comprehensive strategic staffing plans in North Carolina: (a) the plan focuses on low-performing schools or student populations, (b) the plan differentiates teachers through some measure of their effectiveness, and (c) the plan incorporates some type of incentive to increase the number of more effective teachers in low-performing schools.

Findings

Based on a review of the most recent set of LEA DSWs, there are currently 18 LEAs with plans that exhibit characteristics of all three criteria—11 funded partially or wholly by RttT and 7 funded entirely by another source. In addition, there are 55 plans that meet either one or two of these criteria. While there are some similarities across plans, overall the plans are quite different.

Conclusions

There are several notable trends and possibilities revealed by this report's first scan of the strategic staffing landscape in North Carolina:

1. *Emergence of second-generation strategic staffing*: Instead of a limited, financial incentive-only approach and an exclusive focus on teachers and administrators, many of the plans reviewed for this report incorporate complex incentives structures tied to school improvement goals, along with inclusion of a broader range of school staff members.
2. *Potential for sustainability*: Very few plans rely exclusively on RttT funds (indeed, many plans across the state use no RttT funds at all), which bodes well for their possible continuation after the grant period ends. However, many of the plans rely on other funding sources that also are short-term; very few LEAs appear to have developed specific plans for sustainability after short-term funding ends.
3. *Growing diversity in strategic staffing approaches*: While they share some similar characteristics, most of the plans described in this report avoid taking a one-size-fits-all approach and instead appear to be tailored to meet local needs.
4. *Opportunities for sharing across LEAs*: The importance of customized plans notwithstanding, the apparent variety in the maturity and complexity of plans suggests that many LEAs with emerging plans may benefit greatly from investigating the more fully developed plans in other LEAs. As mentioned in the RttT proposal, LEAs may benefit from sharing and discussing their plans.
5. *Opportunities for in-depth study*: A side benefit of the diversity of the local strategic staffing plans is that their feasibility and effectiveness can be compared to inform the development of future strategic staffing efforts.

Introduction

Education experts and researchers agree that effective teachers are critical to the academic success of students, but all too often, students who struggle the most do not have access to effective teachers. Concern about the uneven access of low-performing, poor, and minority students to effective teachers is a foundational component of the United States Department of Education's Race to the Top (RttT) program, which encouraged applicants to propose ways in which states could work to counter this persistent trend. In response, North Carolina's proposal offered several state-level initiatives for achieving a more equitable distribution of effective educators statewide, including:

- Increasing the number of high-achieving, new college graduates teaching in North Carolina (Teach for America expansion; North Carolina Teacher Corps);
- Strengthening the development of novice teachers in the lowest-performing schools (New Teacher Support Program);
- Making further use of blended classes for students in an attempt to expand curriculum offerings and provide effective instruction when effective teachers for a subject are not available locally (Virtual Public School Blended Learning);
- Increasing the number of principals prepared to lead transformational change and improve access to high-quality instruction in high-need schools (Regional Leadership Academies); and
- Employing strategic staffing approaches to optimize the distribution of available human capital (State and Local Strategic Staffing Initiatives).

For these last initiatives, North Carolina's RttT proposal included support for three separate but related staffing approaches: a teacher incentives program based on student growth, available to educators in the state's lowest-achieving schools; a state-level voucher program to encourage teacher movement to those lowest-performing schools; and flexibility for Local Education Agency (LEA)-level funding of strategic staffing efforts to strengthen those schools. This report focuses on the LEA-level strategic staffing plans; the voucher incentive (described briefly in Appendix A) and the performance incentive (which first provided school-wide bonuses for teachers in the state's lowest-performing schools that met annual student academic growth targets, and which now is transitioning to providing individual educator bonuses) will be addressed in more detail in future reports.

Many of the individual Detailed Scopes of Work (DSWs) crafted by LEAs outline how they will use their shares of RttT funds and funds from other sources to support local-level strategic staffing plans. Definitions vary, but in general, strategic staffing plans aim to *distribute an education unit's more effective educators² into its lowest-performing schools* (the definition used in this report). Ideally, these efforts will support two of the four major RttT pillars: providing great teachers and leaders for every school, and focusing on turning around low-performing schools. After careful review of all of the LEA DSWs, the Evaluation Team identified over 70 traditional LEAs (out of 115) with some form of strategic staffing in their plans.

² For this report, effectiveness is broadly defined as any measure that differentiates educator impact on students.

As part of the evaluation of North Carolina RttT initiatives that is being conducted by the Consortium for Educational Research–North Carolina (CERE–NC),³ this report begins the process of assessing the impact of these local strategic staffing plans on moving individual LEAs toward a more targeted and thoughtful distribution of their most effective educators, as well as the potential for continuation of these plans at the end of the RttT funding period. The report provides a categorized overview of all of the plans proposed in the LEA DSWs, as well as a detailed description of the most comprehensive of these plans.

Also included is initial information about a state-supported but locally-focused strategic staffing strategy: the provision of technical assistance to selected LEAs to support their development of targeted recruitment and retention strategies. The report ends with a preview of the next stages in the evaluation of this initiative.

³ CERE–NC is a partnership of the Carolina Institute for Public Policy at the University of North Carolina at Chapel Hill, the Friday Institute for Educational Innovation at North Carolina State University, and the SERVE Center at the University of North Carolina at Greensboro.

Purpose, Data, and Methods

Purpose of this Report

An overriding goal of the evaluation of these LEA-level strategic staffing plans will be to determine whether and to what extent they collectively or individually contribute to an increase in the presence of effective teachers in the lowest-performing schools in LEAs with these plans. Specifically, the intent of this evaluation is to:

- Identify, classify, and describe all LEA-level strategic staffing initiatives in operation across the state that support RttT goals (whether funded in whole or in part by RttT, or by some other source or sources);
- Provide qualitative and, where possible, quantitative assessments of the impact of RttT-supported staffing initiatives on outcomes related to the distribution of effective teachers in low-performing schools;
- Provide evidence for policy makers and other stakeholders that they can use to improve the design and implementation of these plans; and
- Provide recommendations for continuation, expansion, or termination of these plans at the conclusion of the RttT period.

This report begins the process of examining these plans by addressing the first of these four goals.

Research Questions and Definitions

Relevant Overall Research Questions for Teacher and Leader Supply and Distribution

The strategic staffing evaluation is one of several included in the larger evaluation of all of North Carolina's initiatives that are designed to impact the supply and distribution of effective teachers and leaders. There are overarching evaluation questions that guide all of the evaluations connected to this target outcome, a subset of which are relevant to the strategic staffing evaluation:

- Do performance incentives for teachers in low-performing schools have positive effects on student and teacher outcomes?
- Are students affected by these programs better off than similar students in similar schools and districts not served by these programs?
- Are these initiatives cost-effective and sustainable?
- To what extent do the initiatives meet critical needs for teachers and principals and improve equitable access to higher-quality⁴ teachers and leaders in targeted geographic and content areas?

⁴ As defined by the state's Educator Evaluation System.

Questions Specific to Local-Level Strategic Staffing

The evaluation questions that govern this and all future reports were derived from application of the overarching evaluation questions to the specifics of strategic staffing. They include:

- Which LEA-level strategic staffing efforts appear to be most effective at improving the access of low-performing students to effective teachers?
- Which strategic staffing efforts appear to be portable (i.e., are likely to work in other LEAs/other contexts)?
- If plans include additional ongoing costs, how can LEAs continue their support for the initiatives after the grant period ends?

A Working Definition of Local-Level Strategic Staffing

Many states and school systems implement school improvement plans that include some mix of staffing strategies, but as yet there is no commonly accepted delineation of the key elements that comprise 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 involving reassignment of entire staff of one or more schools. However, there does appear to be an emerging set of components that collectively lend some structure to the term and inform the definition of a comprehensive strategic staffing plan that is used for this report.

The first and more persistent of these components is the inclusion of some sort of financial incentive to recruit educators. 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-need schools. 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. Several local human resources allocation experiments that extend beyond simple, incentive-based recruitment plans already have been developed and implemented in North Carolina. For example, an initiative in Charlotte-Mecklenburg places effective school leaders and teacher teams in schools in need of improvement,⁵ and several LEAs are recipients of federal funding that supports development of staffing plans at both the individual school and LEA levels.⁶

It is from this more complex approach to human resources allocation—the *purposeful distribution of an education unit's more effective educators into its lowest-performing schools*—that the criteria used to identify strategic staffing plans for the purposes of this evaluation are derived. Broader definitions exist, but this evaluation's criteria for identifying a comprehensive, LEA-level strategic staffing plan are that the plan (a) focuses on low-performing schools or student populations, (b) differentiates teachers through some measure of their effectiveness, and

⁵ Travers, J., & Christiansen, B. (2010). *Strategic staffing for successful schools: Breaking the cycle of failure in Charlotte-Mecklenburg schools*. Watertown, MA: Education Resource Strategies.

⁶ These and other plans still in operation in the state are detailed later in this report.

(c) incorporates some type of incentive to increase the number of more effective teachers in high-need schools. Using these criteria allows the Evaluation Team to include a wide variety of local plans in this report, honoring the intent for LEAs to develop unique plans that reflect specific local needs and situations.

Data

For this first report, the primary data sources were LEA DSWs and every School Improvement Grant (SIG) proposal funded by the federal government in North Carolina in 2010 and 2011. Additional data on local strategic staffing plan specifics (compensation tables, eligible schools, etc.) were retrieved from individual LEA websites or were supplied by the LEAs. Many LEAs also provided information via e-mail and phone conversations to help clarify plan details.

The North Carolina Department of Public Instruction (NCDPI) provided data on state strategic staffing voucher participation, which, while not a focus of this first report, is related and is included in Appendix A. The technical advising vendor provided information about its work to date.

Methods

Because of the wide array of LEA-level strategic staffing plans and the diversity of approaches within those plans (which hinder the ability to aggregate data), this stage of the evaluation relies heavily on qualitative analysis, primarily through a review of every LEA's DSW.

LEAs initially submitted Detailed Scope of Work (DSW) drafts to NCDPI for approval between Fall 2010 and early Spring 2011. Members of the Evaluation Team reviewed Sections D(1) and D(3) of the DSWs⁷ (the sections most directly related to strategic staffing), as well as other sections when they contained relevant information.

As part of its review, three Team members identified DSWs that appeared to contain strategic staffing plans and then began the process of differentiating the comprehensiveness of each plan by looking for evidence of the presence of elements reflective of the three criteria discussed above: (a) a focus on low-performing schools or student populations, (b) a focus on differentiation of teacher effectiveness, and (c) incentives in support of either or both of those criteria. Team members also noted anticipated funding sources for each plan. At least two Team members independently reviewed and coded each LEA's DSW. Text pertinent to the three strategic staffing criteria was highlighted and extracted for analysis.

LEAs participated in a second round of work on their DSWs, which were revised and finalized between September and December 2011. As a result of these revisions, details about strategic staffing plans in each LEA often changed, sometimes significantly; therefore, each revised DSW was again reviewed and re-coded by the Evaluation Team.

⁷ The Evaluation Team reviewed only DSWs from traditional LEAs; many of the components of the strategic staffing definition used for this report (which focuses broadly on optimizing distribution of effective educators across schools) are not applicable for single-school charter schools.

After completion of the second round of coding, results for each DSW were compared to identify discrepancies between each Team Member’s coding results. In situations in which there was (a) a disagreement about funding sources, or (b) a difference or differences in codes assigned by coders, all three raters met to re-read the DSW in question and mutually agree on the final appropriate coding. There were 39 such disagreements across 115 DSWs, most of which stemmed from nuanced interpretations of DSW text.

The Team assigned the first code—“Focus on High-Need Schools”—to any plan that included indications of need based on school-level student data, but not to plans in which need was defined in terms of subject-area teacher shortages.

The Team assigned the second code—“Focus on Effective Teaching”—very broadly, applying it to plans that included qualitative (e.g., results on teacher evaluation instruments) as well as quantitative (e.g., teacher value-added estimations) assessments of effectiveness. The code was not assigned, however, to plans with a focus on “highly qualified” educators, since “highly qualified” typically refers to educator credentials only and not to educator *effectiveness*, which typically refers to impact on student growth and achievement.

The Team assigned the “Incentives” code whenever there was some indication in a plan that incentives were tied to at least one of the other two strategic staffing criteria (e.g., when an incentive was tied to a teacher’s move to a low-performing school, but not when an incentive was available for all schools in an LEA, regardless of school need).

After finalizing codes based on review of the DSWs, the Team then conducted a verification procedure during which every LEA whose DSW received all three codes was contacted to confirm the coding and gather more information about the plans described in the DSWs. Several codings were amended to reflect the detailed information gathered during this verification process.⁸

The Team developed narratives of each comprehensive plan, along with appropriate illustrative tables for some of the more complex plans, and shared these narratives and tables with the LEAs for confirmation of their accuracy. Most LEAs engaged in this verification process, but two LEAs did not respond to requests for confirmation; plans for these LEAs are noted as being “not confirmed” in the text that follows.

⁸ Many of the DSWs indicated that their strategic staffing plans would be funded by two non-RttT federal programs: the School Improvement Grant (SIG) program and the Teacher Incentive Fund (TIF) program (both described in greater detail below). To ensure that this report reflected the full scope of comprehensive strategic staffing plan that addressed the state’s RttT goals, the Team repeated the entire review process for each of the 41 SIG proposals submitted by LEAs, as well as for all TIF-funded programs currently in operation.

Overview of Local Strategic Staffing Efforts in North Carolina

Local Strategic Staffing Plans

Based on a review of the LEA DSWs using the criteria outlined above, there are currently 18 LEAs with plans that exhibit characteristics of all three criteria—11 funded partially or wholly by RttT and 7 funded entirely by another source. This report also identifies plans that include two of these components, as well as those that include only one component, as long as that single component targets an area of need (low-performing schools or the distribution of effective teachers; incentive-only plans with no clear focus on either low-performing schools or differentiation and re-distribution of teachers are acknowledged but not included in the formal count). In addition to the 18 plans noted above, the Evaluation Team has identified 55 plans that meet these less stringent criteria (Figure 1, following page, and Appendix B).

Related Strategic Staffing Efforts

Two other efforts of note that include local strategic staffing elements—one funded by RttT and the second by non-RttT federal funding—support implementation of local-level strategic staffing plans.

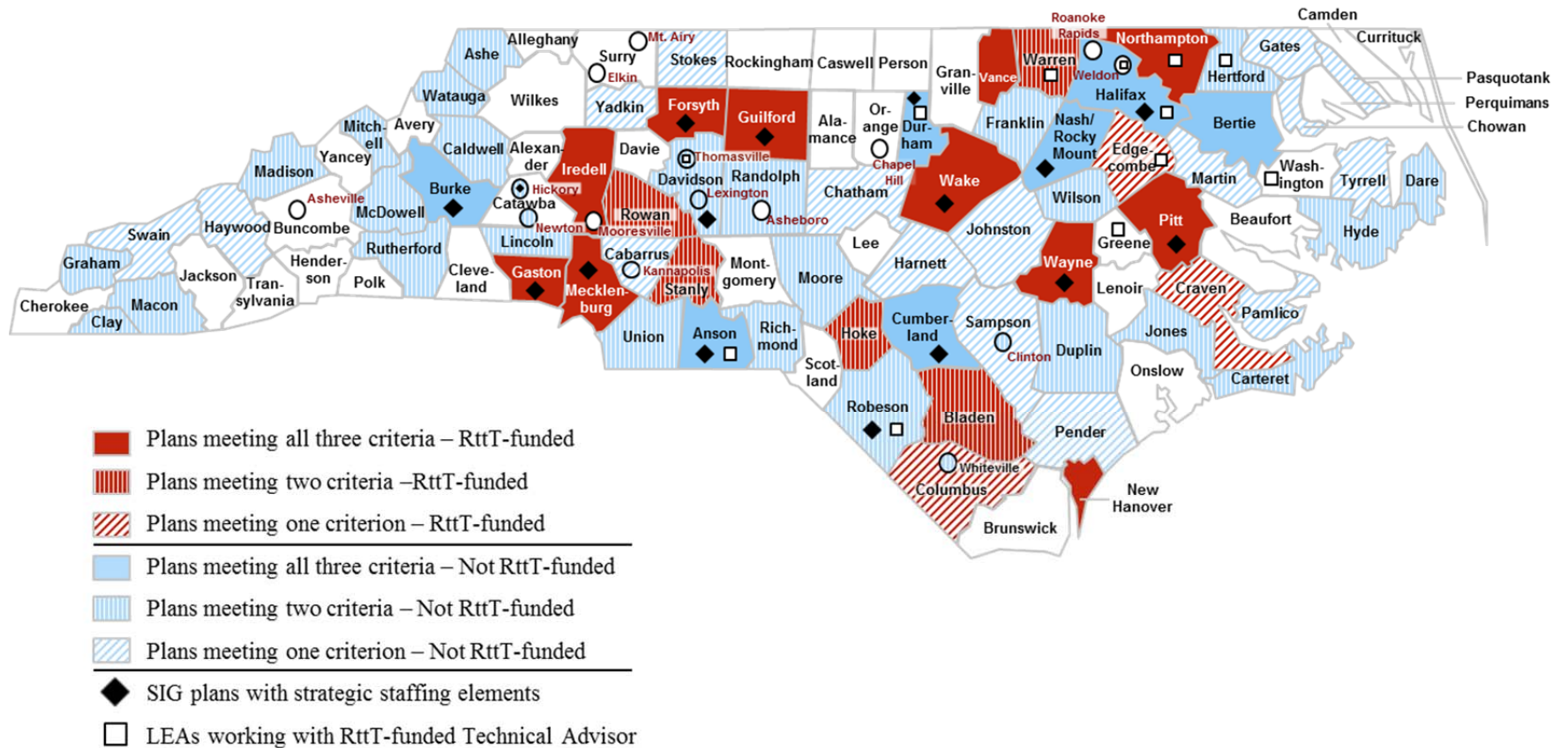
Recruitment Support for District and School Transformation Districts

North Carolina's RttT proposal included a commitment to provide technical assistance to LEAs and their communities to help them plan and implement strategic staffing initiatives. To that end, the state selected Marstrats, a marketing and consulting firm, to serve as technical advisors for the state's 12 lowest-performing LEAs (identified in Figure 1, following pages, and Appendix B) as they develop plans to recruit high-quality teachers. Based on its review of each LEA's DSW, the Evaluation Team determined that most of the LEAs receiving services from Marstrats also are supporting local strategic staffing efforts that incorporate some or all of the elements included in this report's working definition of a comprehensive plan.

Marstrats has proposed a three-pronged approach to providing services. Marstrats completed a Due Diligence period during the Spring and Summer of 2012, during which it reviewed current research on teacher recruitment and retention, conducted on-site meetings with representatives from each of the 12 LEAs, and developed a unique community profile for each LEA by gathering information about population, geography, commerce, lifestyle, and other descriptive statistics. Following this Due Diligence period, Marstrats will develop customized plans for each LEA by mid-Fall 2012 that focus on developing unique branding, establishing context-specific retention strategies, and using a variety of media to advance the work and support improved public relations. The final step of the plan includes a series of regional workshops that will be used to share results from the previous two steps.

Information about Marstrats's projected timeline is included in Appendix C. The Evaluation Team will continue to track the group's progress and the integration of their work into the broader strategic staffing plans already in place in these LEAs.

Figure 1. LEA-Level Strategic Staffing Plans



Note: Plans with incentives only (no clear linkage to supporting high-need schools or to differentiating teachers by effectiveness) are not included.

Other Federal Grants—Teacher Incentive Fund and School Improvement Grants

Several LEAs are recipients of one or more non-RttT, federally-funded grants that support strategic staffing efforts. One such grant, the Teacher Incentive Fund (TIF), supports development and implementation of performance-based teacher and principal compensation systems in high-need schools. Compensation systems funded through this program also may provide educators with incentives to take on additional responsibilities and leadership roles. Another set of grants, the School Improvement Grants (SIGs), are broader in scope, but some of those awarded in North Carolina include support for school-specific strategic staffing plans. While the plans developed under these two programs are not funded by RttT, they are included in this report's descriptions of LEA-level strategic staffing efforts to ensure that the report reflects the full scope of comprehensive strategic staffing plans in place that address the state's RttT goals.

Descriptions of Selected Comprehensive Strategic Staffing Plans

This section provides overviews of a representative set of the comprehensive strategic staffing plans identified in Figure 1 and Appendix B. While these plans are all similar in that they incorporate all three of the elements included in this report’s definition of a comprehensive strategic staffing plan, each LEA has operationalized those elements in different ways (Table 1).

Table 1. Summary of Variations in Operationalization of Strategic Staffing Elements

Element	Approaches to Operationalization
Focus on High-Need Schools	School identification based on: <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 • Judicial mandate
Focus on Differentiation of Educator Effectiveness	Differentiation based on: <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 • Other qualitative measures (e.g., evidence of leadership, results of mandatory re-application for positions, etc.)
Incentives in Support of High-Need School and Teacher Differentiation Foci	Individual incentives based on: <ul style="list-style-type: none"> • <i>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 • <i>Performance</i> <ul style="list-style-type: none"> ○ Student performance and/or growth ○ Educator evaluation results Other incentives: <ul style="list-style-type: none"> • Grade- and schoolwide incentives based on grade-level or schoolwide student performance and/or growth (including incentives for non-certified staff) • Incentives in support of targeted professional development and additional coursework • Recruitment incentives • Retention incentives • Non-financial incentives (e.g., housing, equipment, etc.)

The descriptions in this overview demonstrate the variety of ways in which LEAs have combined these basic components to form their plans.

Following the designations in Figure 1 and Appendix B, the section is divided into two subsections. The first subsection describes representative plans from LEAs whose plans are supported in whole or in part by RttT funds (as indicated in their DSWs). In keeping with the RttT grant's emphasis on ensuring that RttT-funded initiatives are structured to prepare for their continuation after RttT funding ends, it is important to note that only a handful of the plans in this subsection are exclusively funded via RttT; most of these plans also are funded by a combination of other federal grants (e.g., TIF) and local sources, as noted below. The second subsection describes plans supported wholly from other sources, including those that are part of an LEA's SIG plans. Descriptions of additional plans identified in Figure 1 and Appendix B as meeting all three criteria (both with and without RttT support) are included in Appendix D.

As noted above, 55 LEAs have developed innovative plans that meet only one or two of the criteria used to identify comprehensive plans for this report; descriptions of a representative set of these plans are included in Appendix E.

In a few cases, the narratives as verified by some LEAs have been truncated before inclusion in this report to focus them exclusively on the elements of the plans that reflect the strategic staffing definition used for this evaluation.

Selected Comprehensive, RttT-Supported Plans⁹

*Winston-Salem/Forsyth County Schools*¹⁰

There are three programs operating in the Winston-Salem/Forsyth County Schools (WSFCS) that contribute to an overall strategic staffing plan: STAR³, Equity+, and Project ENRICH. Funding for the three 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. The LEA plans to move toward alignment of incentive pay plans system-wide in the coming years.

In addition to these three 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. The LEA's DSW does not specify how the LEA will meet this commitment.

⁹ For this report, a strategic staffing plan is categorized as "RttT-funded" regardless of the proportion of the funds derived from RttT to support the plan. Because funding sources for each plan or set of plans are differentiated with varying degrees of specificity across LEA DSWs, it was not possible to provide exact funding amounts for this report. Future reports will attempt to include such information when possible.

¹⁰ Details about Winston-Salem/Forsyth's separate, SIG-funded plan are included in Appendix D.

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 **A**ctively **R**ecruiting, **R**etaining, and **R**ewarding) program is designed to support whole-school turnaround. The program is now in its first implementation year (2011-2012) 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 (to be provided starting in the 2012-13 school year via a Teacher Development Academy and an Executive Leadership Academy, respectively).¹¹ 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 pay bonus; 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 an additional \$10,000 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. More details about the incentives structure are included in Appendix F.

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.

¹¹ When they open, the Teacher Development Academy and the Executive Leadership Academy will be available for educators in all WSFCS schools.

3. Project ENRICH (funded by a five-year Teacher Quality Partnership grant)¹²

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.

*Guilford County Schools*¹³

Guilford County’s strategic staffing initiative, named 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**),¹⁴ 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

¹² http://www.uncg.edu/soe/project_enrich/

¹³ Details about Guilford’s separate, SIG-funded plan are included in Appendix D.

¹⁴ 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.

approach is more successful than another at supporting gains in student performance. Currently available incentives for each program¹⁵ 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**

Appendix F includes more details about the Mission Possible incentives structure.

Iredell-Statesville Schools

The Iredell-Statesville Schools plan focuses on supporting human capital development in its most challenging schools. Prior to RttT, Iredell-Statesville provided financial incentives for teachers who elected to work in its two alternative schools, and beginning with the 2010-11 school year, the LEA also provided financial support for targeted professional development. Because of non-traditional staffing demands in its alternative schools, where candidates most suited for the environment are not traditionally licensed and teachers often are expected to teach more than one subject, Iredell-Statesville provided funding for coursework and testing necessary for teachers to achieve highly-qualified status in multiple subject areas. These incentives are now being expanded under RttT to attract and retain teachers for a larger set of identified priority schools. Schools of priority are identified based on high staff turnover rates and low school achievement as measured by ABCs accountability outcomes. In addition to the incentives and training support, Iredell-Statesville also provides incentives to encourage experienced teachers to serve as mentors for beginning teachers in these schools.

The incentive-only plan has not yet led to full realization of the desired outcomes, so in school year 2011-12, Iredell-Statesville began experimenting with an additional staffing approach at one of its lowest-performing schools. Before the school year began, all teachers at the school were required to re-apply for their jobs, and the LEA would re-evaluate the staff at the school each year until the school's outcomes meet expectations. Those who are re-hired are provided with two weeks of professional development targeted to the specific needs of the school, as well as compensatory pay commensurate with the additional time commitment required by the

¹⁵ http://www1.gcsnc.com/depts/mission_possible/pay.htm

professional development. Teacher rehiring is based on student achievement data (ABCs data, as well as EVAAS results, when applicable), results from LEA-developed assessments whose results have been determined to correlate strongly with ABCs test results, and evaluations by experts who observe and critique demonstration lessons for every teacher. Applications for positions at the school are not restricted to current LEA employees, which helps to ensure that hiring for most vacancies is competitive.

Charlotte-Mecklenburg Schools¹⁶

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. 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, CMS provides signing bonuses and student achievement growth-based salary supplements via a TIF grant (detailed below), though 2011-12 was the final year of this program.

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

CMS has adjusted its TIF-funded merit pay plan each year since its initial inception, but each year's plan included several components (for details, see Appendix F). 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.

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 (Appendix F).

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

¹⁶ Details about Charlotte-Mecklenburg's separate, SIG-funded plan are included in Appendix D.

VAMs. Under this revised plan, administrators could earn up to \$5,400 per year, and teachers could earn up to \$7,400 per year (Appendix F).

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 and benefits pay plan for participating principals. The talent search—which is part of a broader CMS Talent Pool Process for planning for principal succession—screens potential candidates for principalships and assistant principalships at high-need schools that are part of special, non-geographically-based Central Elementary and Secondary zones.¹⁷ These potential candidates are identified by the superintendent, chief academic officer, and area superintendents (associate superintendents tasked with providing leadership in one of six geographic areas of the LEA) as being potential change-leaders. They come from a pool that includes current CMS teachers who have demonstrated the potential for entering a formal leadership role, current CMS principals who have showed gains in student achievement that surpassed 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 are also 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. CMS has identified its fourth cohort for this program.

Differentiated incentives are also 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.

*Pitt County Schools*¹⁸

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 has expanded to include between 15 and 18 teachers (some of whom moved together as cohorts) who are working in six lower-performing schools.

¹⁷ When first introduced, these zones were originally referred to collectively as the Achievement Zone.

¹⁸ Details about Pitt's separate, SIG-funded plan are included in Appendix D.

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 then 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 has identified five such schools (all elementary or middle), with a sixth new school identified for the current school year (2011-12) based on projections of what its composite score would have been, based on the performance of its current students when they were in their original schools.

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.

Vance County Schools

Vance County's strategic staffing plan mirrors the state-level strategic staffing plan in a number of ways. Vance has identified six schools for its program, which will start in the 2012-13 school year. Each of these schools had ABCs Composite scores below 60% in at least two of the past three school years for which data are available (2008-09, 2009-10, and 2010-11). Teacher eligibility also is based on the criteria used for the state-level strategic staffing plan: Teachers must hold P2 licenses, they must have ratings above "Proficient" on each of the original five standards of the Teacher Evaluation Process, and they must not have taught in the eligible school during the preceding 12 months. In addition, Vance is in the process of considering ways to include aspects of the new sixth TEP standard, the Student Growth standard, in its teacher eligibility identification process.

The Vance plan only sets aside a total of \$15,000 a year for incentives each of the 2011-12, 2012-13, and 2013-14 years, but since the plan was not operational for the 2011-12 school year, funds for that year are now available for the final two years. In addition, one of the six identified schools also qualifies for state RtT District and School Transformation intervention, which means that teachers who transfer to that school and meet the eligibility requirements described above also are eligible for the state-level strategic staffing voucher. Vance intends to take advantage of that program to fund incentives for that school, leaving the remaining funds available for incentives in its other five identified schools. The LEA intends to pursue additional funding to increase the incentives it is able to offer.

*Wake County Public School System*¹⁹

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.

***Selected Comprehensive, Non-RttT-Funded Plans
(Including SIG-Funded Plans with Comprehensive Strategic Staffing Elements)***²⁰

Forty persistently low-performing North Carolina schools currently are receiving federal School Improvement Grant (SIG) funds as authorized under section 1003(g) of Title I of the Elementary and Secondary Education Act. In 2010-11, over \$63 million in SIG funds were allocated to the first cohort of schools in 18 LEAs across the state. For 2011-12, over \$50 million in SIG funds were allocated to the second cohort of schools in 13 LEAs.

While not a required component of the SIG application, many LEAs incorporated strategic staffing plans into their SIG proposals (all of which already meet the criterion for focusing on high-need schools). LEAs whose SIG proposals include strategic staffing plans that meet all three of the criteria used to identify plans for this report are described briefly here.

¹⁹ Details about Wake's separate, SIG-funded plan are included in Appendix D.

²⁰ Plans wholly funded via local, state, and/or federal programs other than RttT. As noted above, descriptions of non-RttT-funded plans (usually school-level SIG plans) that are in place alongside RttT-funded plans are included in Appendix D.

In addition to these SIG-funded plans, this section also includes descriptions of other comprehensive plans not funded by SIGs.

Burke County Schools

Burke County Schools has included a strategic staffing component as part of its SIG plan for one of its schools. As part of its plan, Burke will combine the school with another struggling school and retain only those teachers with positive evaluations. The plan includes several school- and individual-level incentives, some of which are tied to school-level student outcome measures and others of which are linked to personal professional behaviors and subject-specific student achievement measures. Staff are encouraged to extend their time planning together via a \$100-per-day bonus for up to a week of work beyond required summer work-days. Each certified teacher and classified staff member receives a \$500 and \$300 bonus, respectively, if she or he records no more than one absence each semester. All certified teachers and classified staff will receive a \$1000 and \$500 bonus, respectively, if the 4-year cohort graduation rate meets certain annual improvement goals (2010-11: 60%; 2011-12: 62.5%; 2012-13: 65%). Finally, each certified staff member who teaches a state-tested course is eligible for a \$1,000 bonus if 50% or more of her or his tested students achieve at Level III (passing) or IV on the EOGs or EOCs.

Cumberland County Schools

1. Locally-Funded Plan

In 2007, the Cumberland County Board of Education implemented an incentive program to recruit National Board Certified Teachers and highly effective teachers with special licenses (teachers in target licensure areas who demonstrate a history of student success via academic growth as measured by standardized test scores and EVAAS estimations of teacher value-added) into 10 of the LEA's most academically challenged schools. Schools were identified based on a number of factors, including overall academic progress (as demonstrated by the proportion of students performing below grade level on state End-of-Grade and End-of-Course [EOC] tests), the proportion of students at the school classified as being socio-economically disadvantaged, the proportion of identified special needs students, and the school's recruitment success with and retention rates of highly effective teachers.

The Board approved the stipend, awarded on a monthly basis, for up to 30 teacher positions²¹ across the 10 schools. Eligible teachers have the opportunity to earn as much as \$12,000 per year through this program (depending on licensure level; teachers with bachelor's-level licenses earn less). The LEA reports that retention rates for these teachers have been high.

In addition to the stipend, Cumberland also continues longstanding partnerships with three area universities (Fayetteville State University, Methodist University, and the University of North Carolina at Pembroke) to facilitate targeted recruitment of novice teachers to high-

²¹ Since the stipends are not limited to teachers who change schools within the LEA but are also open to teachers new to the LEA, they also function as recruitment incentives.

need schools.²² Cumberland's Human Resources department works with the universities to make strategic placement decisions for student-teacher internships. In addition, a staff member from Human Resources actively participates on two of the universities' Teacher Education Committees, and the third university provides a representative to participate in the regional Personnel Administrator's Association in which Cumberland maintains membership.

2. SIG-funded Plan

Cumberland County Schools received SIG funds to implement a school turnaround model at Walker-Spivey High School, which serves exceptional children. As part of the turnaround process, Walker-Spivey was consolidated with another local high school, but Walker-Spivey's function remains to serve its original target population as a separate program within the larger school. The Walker-Spivey turnaround plan includes an incentive program with some strategic staffing elements, including school- and individual-level pay for performance based on student achievement as demonstrated via state EOC tests. The incentive plan was first offered during the 2011-12 school year and will be extended through the 2012-13 school year. Details of the plan are included in Appendix F.

Durham Public Schools

Durham Public Schools (DPS) has been awarded three three-year, school-level SIGs from the United States Department of Education—one in 2010 and two more in 2011. As part of overall efforts to transform these three low-performing schools (one elementary school, one high school, and one alternative school), each of the plans includes support for a strategic staffing component, called the Teachers of Power (TOPS) plan. TOPS includes both targeted recruitment and performance-based incentives for teachers.

1. Teacher Recruitment and Retention Incentives

DPS offers the following recruitment incentives to attract teachers to TOPS schools:

- A \$2,500 one-time bonus for teachers in the following content areas: English I, English II, Biology, Exceptional Children, and Common Core Math; and
- Eligibility for the performance incentives outlined below.

To support retention, teachers who leave prior to the end of their third year will be required to repay recruitment incentives on a prorated basis.

2. Teacher Performance Incentives

All TOPS teachers are eligible for annual performance incentives for the achievement of school-wide and individual goals. Incentives are both school-based and individual-based. These incentives include:

²² All state colleges and universities are required to develop and maintain such partnerships, but some LEA-higher education partnerships are more targeted than others.

- \$1,000 to each licensed employee if the school is designated “High Growth” or better under the state’s ABCs of Public Education; and
- \$1,500 for each teacher of a tested subject whose students demonstrate high growth.

Gaston County Schools

Staff at Gaston County’s two SIG schools are eligible for recruitment incentives in addition to the signing bonus that Gaston County already offers teachers in hard-to-staff subject areas (mathematics, science, foreign languages, English as a Second Language, and special education). Staff at one of the schools also are eligible for both evaluation- and performance-based incentives. To be eligible for the evaluation-based incentive, a teacher must either: (1) show growth in at least one of the standards that comprise the state’s Teacher Evaluation Process (does not apply to new teachers) and have no ratings below “Proficient”; and/or (2) earn or maintain ratings of “Accomplished” or “Distinguished” for every standard. To be eligible for performance-based incentives, 85% or more of a teacher’s students must meet grade-level standards or show one year of growth.

Nash-Rocky Mount Schools

The strategic staffing components of Nash-Rocky Mount’s plan for its SIG school include individual teacher bonuses for evidence of student academic growth and for personal attendance rates. Teachers in core subject areas—Algebra I, biology, English I, reading (6th through 8th grades) and math (6th through 8th grade)—are eligible for a \$3,000 incentive if their students demonstrate overall positive academic change, based on ABCs results. Most staff also are eligible for a graduated attendance incentive of up to \$500 for missing five or fewer student and mandatory work days. Nash-Rocky Mount’s SIG also includes bonuses for administrators, teachers, and other staff for whole-school academic growth (as measured by the ABCs accountability model) and for meeting a whole-school student attendance rate goal. Total maximum compensations range between \$1,500 (classified staff) and \$4,000 (core subject teachers).

Conclusions, Limitations, and Next Steps

Conclusions

For most of the plans described in this report, it is far too early to make formal assessments of either their quality or impact. There are, however, several notable trends and possibilities revealed by this first cursory scan of the strategic staffing landscape:

1. *Emergence of second-generation strategic staffing*: Instead of a limited, financial incentive-only approach and an exclusive focus on teachers and administrators, many of the plans reviewed for this report incorporate complex incentives structures tied to school improvement goals, along with inclusion of a broader range of school staff members.
2. *Potential for sustainability*: Very few plans rely exclusively on RttT funds (indeed, many plans across the state use no RttT funds at all), which bodes well for their possible continuation after the grant period ends. However, many of the plans rely on other funding sources that also are short-term; very few LEAs appear to have developed specific plans for sustainability after short-term funding ends.
3. *Growing diversity in strategic staffing approaches*: While they share some similar characteristics, most of the plans described in this report avoid taking a one-size-fits-all approach and instead appear to be tailored to meet local needs (as indicated by the range of approaches outlined in Table 1).
4. *Opportunities for sharing across LEAs*: The importance of customized plans notwithstanding, the apparent variety in the maturity and complexity of plans suggests that many LEAs with emerging plans may benefit greatly from investigating the more fully-developed plans in other LEAs. As mentioned in the RttT proposal, LEAs may benefit from sharing and discussing their plans.
5. *Opportunities for in-depth study*: A side benefit of the diversity of the local strategic staffing plans is that their feasibility and effectiveness can be compared to inform the development of future strategic staffing efforts.

Limitations

Every effort was made to verify the accuracy of the descriptions of strategic staffing plans in this report with representatives from each LEA; however, as noted throughout, the Evaluation Team was not able to secure verification in every case. In addition, due to inconsistencies in the availability of information about strategic staffing efforts across LEAs, it is possible that the Team inadvertently missed viable plans. The Team will revise and expand the narratives for future reports as more information becomes available.

While working on the narratives for this report, it also became apparent that many of the strategic staffing plans likely will impact only a small number of teachers in any given LEA, and thus only small student populations. That factor, coupled with the fact that most teachers are further sub-dividable by subject area, and that only a fraction of all courses potentially impacted by teacher reassignment as a result of strategic staffing also are in formally tested subjects, will

limit future opportunities for rigorous quantitative assessments of the impact of any given plan on student outcomes. The Evaluation Team will incorporate quantitative assessments in future reports when possible.

Next Steps

LEA-Level Strategic Staffing Site Selection

Data from all LEAs with RttT-funded strategic staffing plans will be used for analyses and reports. The evaluation also will include site visits to a selected, representative sample of these LEAs. The Evaluation Team will work with a purposeful sample of LEAs that are representative of the diversity of LEAs statewide and that are implementing strategic staffing plans that include all three of the criteria described earlier in this report (focus on high-need schools, differentiation of teacher effectiveness, and incentives aligned with the first two criteria) to conduct in-depth studies of their plans and the effectiveness of those plans in terms of teacher redistribution, teacher effectiveness, and changes in student outcomes.

Summary of Upcoming Evaluation Work

In Fall 2012, the Team will update its list of LEAs with strategic staffing plans, compile educator participation statistics (for plans that include educator movement, and also for the state voucher initiative) and other pertinent baseline measures, and conduct a first round of focus group sessions with teachers and interviews with principals in three cooperating LEAs.

Between Spring 2013 and Fall 2014, the Team will continue to track and revise plan descriptions and participation rates, conduct additional rounds of focus group sessions and interviews, and, beginning in Summer 2013, start the process of assessing potential impacts of programs, when data allow.

Finally, the Team will continue to track and report on the plans devised for the LEAs served by the recruitment and retention technical advisor (Marstrats), as well as on any annual outcome data available regarding changes in recruitment and retention numbers for those LEAs. In addition, the Team will follow the state's progress toward implementation of other local strategic staffing supports outlined in the RttT proposal, including:

- Engaging in-state and nationally-recognized groups with relevant expertise to provide strategic staffing workshops, consultation, and technical assistance to LEAs; and
- Sharing information during LEA leadership institutes about current strategic staffing initiatives and their results, from North Carolina and from other states.

Appendix A. State Strategic Staffing Voucher

North Carolina's RttT plan set aside about \$3 million over the course of the RttT period (2011-12 through 2013-14) to provide incentives to support a state-level effort for teacher recruitment and retention in the state's lowest-achieving schools. Part of that funding supports vouchers for effective teachers who relocate to a subset of those schools (criteria for school eligibility are detailed below). The voucher can be used either for forgiveness of student loans, tuition for obtaining one of several master's degrees related to education, housing, or any combination of the three. The value of the voucher (\$5,360) is roughly equivalent to the cost of two semesters of coursework (two courses per semester) at an in-state degree-granting program. The voucher was first made available to teachers for the 2011-12 school year.²³

In February 2011, the North Carolina State Board of Education approved a definition of teacher eligibility for the program, which specified that only Career-status teachers (i.e., teachers who have successfully completed four consecutive years of teaching) with ratings at or above "Proficient" in each area of the state's Teacher Evaluation Process (or the equivalent, for out-of-state teachers) *and* who have not in the previous year worked in an eligible school in the LEA into which they are transferring are eligible. The complete policy is available below.

For the 2011-12 school year, only six teachers received the voucher. Three transferred to LEAs in the northeast and two transferred to an LEA in the Piedmont region; the sixth was an out-of-state teacher who met the State Board-defined criteria and took a position in a northeastern LEA. According to staff at the Department of Public Instruction, no candidates were rejected; LEAs vetted all possible candidates for the voucher and submitted only those who met the criteria. The Evaluation Team will continue to track participation in the program and will interview recipients beginning in Fall 2012.

The North Carolina State Board of Education Policy on Recruitment Incentives for Low-Achieving Schools is included on the next two pages.

²³ <http://www.ncpublicschools.org/docs/stateboard/meetings/2011/revisions/02tcs01attachrevised2320.pdf>

Recruitment Incentive for Lowest Achieving Schools (A Race to the Top Initiative)

The following initiative was included in the Race to the Top (RttT) application, section D3 (2):

NC will provide every new teacher who chooses to work in the lowest-achieving schools – regardless of her or his point of entry (through TFA, through the NC Teacher Corps, through lateral entry, or through traditional routes) – with a voucher that can be used for either:

- The forgiveness of student loans for each year of teaching;
- Tuition for obtaining a Master’s degree in education, educational administration, or the content area in which she or he teaches;
- Housing; or
- Any combination of the three.

The value of the voucher will be equivalent to the cost of two semesters of coursework, two courses per semester, at an in-state degree-granting program.

The State Board of Education will approve the definitions used within the above Race to the Top (RttT) initiative:

1. Define the term “new teacher”;
2. Approve the schools selected to be eligible;
3. Determine the length of time the teachers are eligible for the voucher;
4. Determine the documentation responsibilities for the payments.

1. DEFINITION OF “NEW TEACHER”

- A classroom teacher who holds a Standard Professional II license and, if evaluated using the North Carolina evaluation instrument, has received a performance rating of above proficient.
- Instructional support and school-based administrators are not eligible;
- A teacher is “new” if they have not worked in a lowest achieving school within the LEA in the previous 12 months;

2. THE SELECTED LOWEST ACHIEVING SCHOOLS

Schools were selected from the population of lowest achieving schools.

Lowest achieving schools are those with a graduation rate less than 60% (9 schools) and the lowest 5% of conventional schools. The list does not include alternative, hospital, special or charter schools.

In order to avoid competition between schools within the same LEA, all lowest achieving schools are grouped within the LEA. Therefore, if an LEA is selected, all the lowest achieving schools within that LEA are selected for the program. Only the 36 LEAs with at least one lowest achieving school are considered.

LEAS were selected based on

- LEA 3-year average teacher turnover rate
- LEA geographic location

The 10 LEAs selected are

1. The LEA in each district with the highest 3 year average teacher turnover rate.
2. The LEAs with a 3-year average teacher turnover rate greater than 20%.

Note: District 8 has no lowest achieving schools.

None of the large urban districts met the selection criteria. These LEAs have current programs addressing recruitment.

3. HOW LONG WILL THE NEW TEACHERS BE ELIGIBLE FOR THE VOUCHER?

Teachers will be eligible for the voucher for each year that they work at the selected school. A new teacher who works a portion of the year will be eligible for a pro rata share of the voucher.

LEAs will receive a letter of intent from the teacher, stating that they will work at the school for the length of the pilot.

The RttT budget for the recruitment vouchers is approximately \$1million for each of the 3 years, starting in 2011-12 school year. At the end of the RttT grant, the effectiveness of the program will be evaluated.

4. THE MONITORING REQUIREMENTS

The voucher shall be paid to the teacher through payroll, and related taxes will be assessed if applicable. LEAs are responsible for obtaining documentation from the teacher, proving the funds were used for the allowable expenses. This documentation shall be maintained at the central office and made available for audit purposes.

Appendix B. LEA-Level Strategic Staffing Plans

Region	LEA Code	LEA	Strategic Staffing Criteria Met			LEA using RttT funding to support plan(s)?
			Identification of Effective Teachers	Incentives	Focus on High-Need Schools	
<i>Plans Meeting All Three Criteria</i>						
6	40	Anson~	X	X	X	
1	80	Bertie^	X	X	X	
7	120	Burke~	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	
7	490	Iredell-Statesville	X	X	X	Yes
6	600	Charlotte-Mecklenburg~	X	X	X	Yes
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
3	910	Vance	X	X	X	Yes
3	920	Wake~	X	X	X	Yes
2	960	Wayne~	X	X	X	Yes
<i>Plans Meeting Two Criteria</i>						
7	50	Ashe	X		X	
4	90	Bladen	X		X	Yes
7	140	Caldwell+	X	X		
2	160	Carteret	X		X	
7	181	Hickory City~		X	X	
7	182	Newton-Conover City	X		X	
8	220	Clay	X		X	
4	240	Columbus	X		X	Yes
4	241	Whiteville City	X	X		
1	280	Dare	X		X	
5	290	Davidson~		X	X	
5	291	Lexington City	X	X		
5	292	Thomasville City"	X		X	
2	310	Duplin	X		X	
3	350	Franklin	X		X	
8	380	Graham	X		X	
1	460	Hertford"	X		X	
4	470	Hoke	X	X		Yes
1	480	Hyde+	X		X	
2	520	Jones	X		X	
6	550	Lincoln	X		X	
8	560	Macon	X		X	
8	570	Madison	X		X	
8	590	McDowell	X		X	
8	610	Mitchell	X		X	
4	630	Moore	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

Local Strategic Staffing in NC: Review of Plans and Early Implementation
September 2012

Region	LEA Code	LEA	Strategic Staffing Criteria Met			LEA using RtT funding to support plan(s)?
			Identification of Effective Teachers	Incentives	Focus on High-Need Schools	

Plans Meeting Two Criteria (cont.)

5	760	Randolph	X		X	
4	770	Richmond	X		X	
4	780	Robeson~"	X	X		
7	800	Rowan-Salisbury		X	X	Yes
8	810	Rutherford	X		X	
2	821	Clinton City	X		X	
6	840	Stanly	X		X	Yes
6	900	Union		X	X	
3	930	Warren"	X	X		Yes
7	950	Watauga	X		X	
3	980	Wilson		X	X	

Plans Meeting One Criterion

6	130	Cabarrus	X			
6	132	Kannapolis City	X			
5	190	Chatham			X	
1	210	Edenton-Chowan	X			
2	250	Craven			X	Yes
3	330	Edgecombe"			X	Yes
4	430	Harnett			X	
8	440	Haywood			X	
3	510	Johnston			X	
1	580	Martin			X	
2	690	Pamlico			X	
1	700	Elizabeth City-Pasquotank	X			
2	710	Pender	X			
2	820	Sampson	X			
5	850	Stokes			X	
8	870	Swain	X			
1	890	Tyrrell	X			
7	990	Yadkin			X	

Other LEAs of Note

5	10	Alamance-Burlington*		X*		
3	422	Weldon City*"		X*		
2	540	Lenoir*		X*		
5	790	Rockingham*		X*		
7	860	Surry*		X*		
2	400	Greene"				
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 RtT-funded Technical Advisor

Appendix C. Race to the Top-Funded Technical Assistance for Teacher Recruitment and Retention

Overview of Vendor's Plan

With RttT support, Marstrats—a marketing and consulting firm—will support the development of recruitment and retention efforts related to strategic staffing in the state's 12 District and School Transformation LEAs.

- *LEAs eligible to receive services:*
 - Anson County Schools
 - Durham Public Schools
 - Edgecombe County Schools
 - Greene County Schools
 - Halifax County Schools
 - Hertford County Schools
 - Northampton County Schools
 - Robeson County Schools
 - Thomasville City Schools
 - Warren County Schools
 - Washington County Schools
 - Weldon City Schools
- *Vendor's proposed service approach:*
 - Due diligence period:
 - Review of current research
 - On-site meetings with eligible LEAs
 - Needs Assessment Survey administered community-wide
 - GeoAnalytics process for gathering information about population, geography, commerce, lifestyle, and other descriptive statistics to develop a unique community profile for each LEA.
 - Development of LEA plans that focus on:
 - Employer (LEA) branding;
 - Retention strategies;
 - Media usage (including digital and social media); and
 - Public relations.
 - Regional workshops: Opportunities to share results from the previous two steps

Local Strategic Staffing in NC: Review of Plans and Early Implementation
September 2012

Proposed Timeline (2012-2013)

	2012												2013			
	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	
Initial Meeting with NCDPI																
Confirm proposal parameters, strategy, and tactics																
Final approval of plan	2/29/2012															
Presentation to Governor's Education Transformation Commission			4/5/2012													
Due Diligence																
On-site meetings w/individual school district leadership/community leaders			2 weeks													
Best practices from Due Diligence meetings																
Follow-up visits to targeted districts (as needed)					2 weeks	2 weeks										
Individual Plan Development																
Development of individual plans							6-8 weeks									
Presentation of initial individual plans to districts																
Final plans with survey data																
Research																
GeoAnalytics		4-6 weeks														
Attitudinal survey								6 weeks								
Presentation of research findings											Early Dec					
Regional Workshops (4)																

Key: ■ = Project Mgmt ■ = District Planning ■ = Due Diligence ■ = Regional Workshops

Shared on May 7, 2012

Appendix D. Other Examples of Comprehensive Plans

This appendix describes comprehensive plans not included in the main text (typically plans for which less descriptive information was available), as well as additional SIG-funded plans that are in operation alongside some of the comprehensive RttT-funded plans described in the main text above.

Plans in LEAs not Highlighted in the Main Text

Anson County Schools

The strategic staffing portion of Anson County’s SIG plan provides a structured, evaluation-based incentives opportunity for teachers who agree to teach at any of the LEA’s three SIG schools. For each of the five original standards in the Teacher Evaluation Process for which a teacher earns an overall rating of “Accomplished,” the teacher receives \$200. For each standard for which a teacher earns an overall rating of “Distinguished,” the teacher receives \$300. The LEA also provides recruitment bonuses for teachers new to these schools.

*Bertie County Schools*²⁴

Bertie County will develop and implement through hiring and assignment practices an equity plan to place the highest-qualified personnel in areas of greatest need. In particular, Bertie will recruit, prior to graduation, potentially highly-qualified personnel from selected partnership universities, such as East Carolina University, North Carolina State University, and the University of North Carolina-Wilmington. In addition, Bertie will recruit alternatively licensed teachers from Teach for America, Visiting International Faculty, and other similar, reputable agencies. Recruits will be offered a pre-signing incentive package that includes district and community “perks” (unspecified in the LEA’s RttT DSW). A related incentive plan will be presented to the Bertie Board of Education for approval.

Halifax County Schools

The Halifax plan for its two SIG schools includes a variety of incentives tied to teacher performance as measured by the state’s Teacher Evaluation Process, as well as to participation in the Summer Bridge program for new students transitioning into the schools, attendance at certain professional development events, and overall work attendance rates. In addition to incentives for performance, the LEA also offers recruitment and retention bonuses.

²⁴ Text not confirmed by LEA.

New Hanover County Schools

The New Hanover School District has developed a Teacher Incentive Plan (TIP) for career teachers who are willing to transfer to one of two identified high-need schools. TIP provides incentive pay to teachers for their contributions to student achievement as well as for their willingness to take on a challenging teaching assignment. The goals of TIP are: to link teacher compensation more closely to student achievement; to reward and recognize teachers for meeting and exceeding expectations; and to enable target schools to attract and retain the most qualified and effective teachers. Financial incentives are earned based on increases in overall school performance and increases in individual student growth. School performance bonuses range between \$750 and \$2,000, based on a school's Tier status and proficiency rates; additional individual teacher incentives can equal up to \$500 per qualifying teacher.

*Northampton County Schools*²⁵

Northampton will provide signing bonuses to fill positions in hard-to-staff grade levels and schools. The LEA also will provide performance-based retention bonuses to keep those positions filled. Beginning in 2011-2, teachers in targeted grades and schools will be eligible to receive retention bonuses based on their performance as measured by student achievement.

Wayne County Schools

Wayne County is using RttT funds and other federal funds to support strategic staffing as part of its implementation of a school turnaround model at two high-need schools, with strategic staffing playing a key role at each. While many of the incentives are awarded for whole-school progress (and thus do not differentiate among teachers in terms of their relative effectiveness), the plan does provide individual incentives for exemplary attendance and for performance as measured through the state's Teacher Evaluation Process (TEP). An incentive is awarded to any staff member with an attendance rate of at least 96%. An incentive is also awarded to any staff member who receives minimum ratings of "Proficient" on all areas of the TEP, as well as to all other staff who receive minimum ratings of "At Standard" for all areas on their evaluation instruments. In the RttT-funded Transformation school, incentives can reach as high as \$3,000 per year for highly-qualified teachers and staff, and up to \$1,500 for instructional assistants. Wayne County also offers a one-time \$1,000 recruitment signing bonus for teachers who are new to the target schools.

In addition to the incentives available in the RttT-supported school, staff at Wayne County's SIG school also are eligible for incentives tied to student graduation rates. In the SIG-funded school, principals are eligible for up to \$4,250 in incentives per year, teachers and certified personnel are eligible for up to \$3,750 per year, and instructional assistants are eligible for up to \$1,875 a year.

²⁵ Text not confirmed by LEA.

Additional SIG Plans in LEAs with RttT-Supported Plans Highlighted in the Main Text

Winston-Salem/Forsyth County Schools

WSFCS is using SIG funding to support extension of the educator effectiveness incentive component of their STAR³ program (see the Descriptions of Selected Comprehensive Strategic Staffing Plans section, above) 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.

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 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 System²⁶ screening process; and exceed expectations in team interviews²⁷ 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.

Charlotte-Mecklenburg Schools

Charlotte-Mecklenburg is using SIG funds to extend its TIF-LEAP model (described in the Descriptions of Selected Comprehensive Strategic Staffing Plans section, above) for its four SIG schools.

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.

²⁶ 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/>

²⁷ Interviews include representatives from the school and from the LEA.

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. A more detailed explanation of the incentives plan is included in Appendix F.

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.

Wake County Public School System (WCPSS)

WCPSS is using SIG funding to support extension of the teacher effectiveness incentives included in its Project Renaissance School program (see the Selected Comprehensive, RttT-Supported Plans section, above) as part of its plan for its SIG school.

Appendix E. Examples of Notable Plans that Meet One or Two Criteria

Caldwell County Schools

Caldwell County's Detailed Scope of Work includes plans for a strategic staffing program that at this point is not yet funded. The plan and background for the plan are described here.

1. Historical Experiments with Strategic Staffing in Caldwell County

Several years ago, one Caldwell County school was identified via No Child Left Behind's Annual Yearly Progress measures as a school in need of improvement. As part of a host of other school improvement efforts, teachers in that school were eligible for differentiated pay during the 2008-09 school year. Several of the school's teachers were moved to other schools across the LEA to make room for new teachers who exhibited the energy levels and confidence student potential that the LEA deemed necessary to turn around the school. The move was a one-year experiment only, but the LEA partially attributes positive changes in that year's school outcomes to the move. Pay differentiation was not based on measures of teacher effectiveness but instead on willingness to transfer to the high-need school. All certified personnel in the school received an additional \$1,200 that year, and non-certified staff received \$600. All of these compensation funds were locally sourced. In addition, a lead Exceptional Children's Teacher was employed and received an additional \$2,000 that year (\$200 per month) from School Improvement Funds (Title I).

2. Current Strategic Staffing Plans under Race to the Top

As part of its commitment, Caldwell County used student achievement data, principal recommendations, and performance to identify about 150 "high-flyer" teachers who were asked to serve as leads in the LEA's preparation for its transition to Common Core State Standards. The LEA identifies this process as a first step toward teacher differentiation (via differentiated teacher leadership). Ensuing steps may include intentional staff movement within the LEA and the return of some sort of incentive pay plan, but at this point, those developments are still in the planning stages.

Caldwell County also is making progress toward differentiation of teacher effectiveness by investing significant resources in the development of a data warehouse to help principals and LEA leaders more effectively use student achievement and growth data for decision-making. The LEA has contracted with TetraData (a Follett company) to develop a data system that will allow for seamless integration of state-generated data (such as EVAAS results) with locally-generated data (in particular, results from Discover Assessment [elementary] and ClassScape [middle school] benchmark testing). The warehouse is functional, and the LEA is moving toward implementation of a data dashboard interface for classroom use. Currently, principals receive monthly training on how to utilize these data for decision-making purposes, and training for teachers has begun as well.

Davidson County Schools

Davidson County is using part of its SIG funding to support a comprehensive and layered incentives plan that offers bonuses at several different levels. There are 10 outcomes for which bonuses can be earned, including evidence of greater-than-expected student achievement growth (as measured by EVAAS), teacher and student attendance, and staff development participation. Most incentives are awarded at the school level; the incentives plan is individualized only for measures not related to teacher effectiveness. Originally, the incentives were available only for certified staff and administrators, but beginning with the 2011-12 school year, incentives were made available to paraprofessionals as well. Details of the incentives plan are included in Appendix F.

Hoke County Schools

From the 2011-12 school year forward, Hoke County Schools is focusing multiple resources on identifying and supporting the development of teachers who are less effective than their peers. The process includes analysis of results from Quality Assurance (QA) school visits, benchmarked student achievement data, and EVAAS results. The QA school visits utilize locally-developed instruments that are based on the AdvancED school accreditation process²⁸ and focus on quality instruction, planning for implementation of the new Common Core State Standards, and instructional integration. The QA team consists of school- and district-level administrators and teachers who make periodic formal and informal visits to classrooms, Professional Learning Communities, and other school units. The QA team shares the results of its visits with each school's School Improvement Team to help inform decisions about professional development needs and other supports (e.g., data interpretation services) that the LEA can provide for the school. Individual teachers identified through this process as being in need of additional support participate in targeted professional development and receive stipends (when training occurs outside of the regular school day).

In addition, Hoke offers several relocation and retention incentives for teachers who move to the LEA, including signing bonuses, relocation bonuses, and housing support. The LEA is working with Hoke County Partners in Education, the Partners for Hoke County Public Schools Education Foundation, and the State Employees Credit Union to construct an affordable housing complex (which will open in Summer 2013) for new teachers and other educators who move to the area.

²⁸ <http://www.advanc-ed.org/>

Lexington City Schools

1. LEA-Wide Recruitment and Retention

All six of Lexington City's schools are identified by the LEA as high-need schools, based on school demographics and the proportion of students eligible for free and reduced-price lunch. Any teacher new to the LEA is eligible for a signing bonus, which is awarded in installments to encourage both retention and personal development. Half of the bonus is awarded when a teacher meets No Child Left Behind highly-qualified teacher standards. Since most teachers in the state already meet this definition (in the 2010-11 school year, all teachers in Lexington City were designated highly-qualified), this portion of the bonus often is offered in support of relocation costs. Teachers receive the second half of the bonus—the retention bonus—in December of their second year in the LEA. If teachers leave the program before this second installment is awarded, they must return the initial installment. While the LEA does not differentiate among its six schools, it does differentiate across subject areas based on relative need. Teachers placed in high-need areas (e.g., math and secondary science) receive a larger bonus (\$2,000) than do teachers placed in other areas (e.g., career and technical education; \$1,500). Since the plan was put in place, the LEA-wide two-year retention rate has hovered around 80%, up from about 60% in previous years.

In addition to the financial retention plan, Lexington City receives assistance from Winston-Salem State University and High Point University for provision of its new teacher induction program.

2. Pay for Professional Growth

Since the 2007-08 school year, Lexington City also has used its District and School Supplemental Funding to support a supplement plan tied to participation in targeted professional development. All teachers who complete a staff development curriculum geared toward implementation of the new Common Core State Standards receive a 1.5% bonus. Bonuses are paid on the last work day of the school year. Teachers are eligible every year, and since most teachers meet the eligibility requirements each year, the plan essentially operates as a second recruitment and retention bonus.

3. Innovative 100 – A Micro-Performance-Based Pay Plan

Since the 2010-11 school year, Lexington City has supported the Innovative 100 program, which rewards teachers for developing innovative instructional strategies and methods. To be eligible, a teacher must submit a request to have one of her or his lessons observed. The lesson must include at least one specific objective from the North Carolina Standard Course of Study for her or his subject. The teacher's principal and the assistant superintendent review all such requests. If accepted for observation, students in the teacher's class are given a pre- and post-test to measure student achievement levels on the selected objective. If appropriate gains are met (i.e., if all students demonstrate achievement levels of 90% or greater, or if they demonstrate a 70% gain between pre- and post-tests), the teacher then works with her or his principal to conduct a staff development session focused on the lesson and instructional technique(s). Teachers who complete all requirements are awarded \$400.

Principals of schools in which 10 innovative practices have been submitted, completed, and approved are awarded a \$1,000 incentive bonus. Lexington City has a goal of awarding the bonus to 100 teachers a year, but the LEA has had limited funding for this program in the past (around \$20,000 a year), and for this year (the 2011-12 school year) funding was reduced to \$10,000.

Union County Schools

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.²⁹ In addition to the supplement, prospective teachers are given tours of the schools, and the Division prepares special information packets about the schools.

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.

²⁹ The LEA notes that these job fairs have declined in number in recent years in response to challenging economic conditions.

Appendix F. Examples of LEA Incentives Plans

Cumberland County Schools (CCS): Incentives Plan for SIG School

Incentive Component	Minimum Requirement(s)	Incentive
<i>Student Achievement</i>	50% or more of students school-wide meet proficiency	\$500 for each teacher
	50% or more of students of an individual teacher of a tested subject meet proficiency	\$500 for individual teacher
<i>Attendance (Does not include professional leave)</i>	At least 97% attendance (175 student days)	97%=\$250; 100%= \$350
<i>School Reform Efforts</i>	Attend 97% of all PLC meetings	\$100
	Attend 97% of Collaborative Planning/Departmental Meetings	\$100
	Attend 97% of School Improvement Team (SIT) meetings (SIT Members only)	\$100
<i>Professional Development Attendance</i>	To qualify, staff member must: <ul style="list-style-type: none"> Attend PD that is a component of her or his PD Plan Ensure the PD <i>does not</i> require teacher to miss more than 5 instructional days Attend a CCS-provided PD Share information from PD in department meetings Submit reflection sheet within one week of PD completion Provide artifacts to support implementation of PD Attend at least ONE PD per year that <i>is not</i> required by CCS or school 	\$100 per qualifying PD session
<i>State ABCs Local-Option Goals for Alternative Schools</i>	School must meet 80% of local-option target goals	\$200

Davidson County Schools: Incentives Plan for SIG School

Measure	Percentage of Maximum Incentive				
	100%	75%	50%	25%	
Individual-Level Incentives	Employee Absences (Instructional/Non-Instructional Required Workdays)	No greater than 1	No greater than 2	No greater than 3	No greater than 4
	Participation in Scheduled Staff Development	Not less than 100%	Not less than 98%	Not less than 95%	Not less than 90%
Whole-School Incentives	School Average Daily Attendance	Greater than 95%	Greater than 92.5%	Greater than 90%	Greater than 85%
	Courses Completed and Passed	No less than 95%	No less than 93%	No less Than 90%	No less than 88%
	Percent of Enrollment Suspended	No more than 10%	No more than 12%	No more than 15%	No more than 17%
	Total Dropouts at End of Month 9 (SY 2009-10 Baseline: 49)	No greater than 85% of 2009-10 baseline.	No greater than 90% of 2009-10 baseline.	No greater than 95% of 2009-10 baseline.	No greater than 2009-10 baseline.
	English 1 Students Above Predicted Growth*	Greater than 70%	Between 60% and 70%	Between 50% and 60%	Between 40% and 50%
	Algebra 1 Students Above Predicted Growth*	Greater than 70%	Between 60% and 70%	Between 50% and 60%	Between 40% and 50%
	Biology 1 Students Above Predicted Growth*	Greater than 70%	Between 60% and 70%	Between 50% and 60%	Between 40% and 50%
	Overall School EOC Performance Composite	No less than LEA Performance Composite, less 15%	No less than LEA Performance Composite, less 20%	No less than LEA Performance Composite, less 25%	No less than LEA Performance Composite, less 30%
		Maximum Incentive per Measure:		Maximum Overall Incentives:	
		Administrators	\$500	\$5,000	
		Certified Staff	\$300	\$3,000	
		Paraprofessionals	\$100	\$1,000	

* Growth determined by comparing a student's EVAAS-predicted EOC performance to her or his actual performance level.

Guilford County Schools: Mission Possible Incentives Structure³⁰

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 L.A., 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
or +	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

³⁰ Adapted from: http://www1.gcsnc.com/depts/mission_possible/

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 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)

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

School-wide VAD Performance Incentives

+	Above (Coded 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
-----	-----	-----	-----	-----	-----	-----	-----

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	\$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

Local Strategic Staffing in NC: Review of Plans and Early Implementation
September 2012

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

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

Salary Bonus							
+	1% of Salary	1% of Salary	1% of Salary	1% of Salary	1% of Salary	1% of Salary	1% of Salary

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

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

Pitt County Schools: Performance Pay Plan for 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

Charlotte-Mecklenburg Schools: A History of the TIF-LEAP Incentives Structure

Year 1 (2007-2008)

1. *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
2. *Stipends.* \$115/day, including benefits for attending approved professional development or assuming leadership roles and extra duties that are related to improving student achievement
3. *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)

1. *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
2. *Stipends.* \$115/day, including benefits for attending approved professional development or assuming leadership roles and extra duties that are related to improving student achievement
3. *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)

1. *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
2. *Stipends.* \$115/day, including benefits for attending approved professional development or assuming leadership roles and extra duties that are related to improving student achievement
3. *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)	

Local Strategic Staffing in NC: Review of Plans and Early Implementation
September 2012

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

1. *Performance-Based Bonuses:*

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)	

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 ≥ 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) ≥ 1.0 SE	\$750 per Grade	\$500 per Grade	\$3,000 ^g	\$750	\$3,000 ^g	\$750 ^g		
Level 3 – Teacher-Level Performance Teacher observations plus EVAAS Teacher Composite: Elementary Level A - ≥ 0.5 SE Composite Level B - ≥ 1.0 SE Composite Level C - ≥ 1.5 SE Composite Level D - ≥ 2.0 SE Composite			\$1,000 \$2,000 \$3,500 \$5,000	\$500 \$1,000 \$1,750 \$2,500				
Additional Bonus - Leadership Paid to effective teachers in selected leadership roles as defined by the STAR ³ District Team			\$500		\$500			
Maximum Potential Payout Per Employee	\$5,000	\$3,500	\$9,000	\$3,750	\$4,000	\$1,250	\$500	\$500

Local Strategic Staffing in NC: Review of Plans and Early Implementation
September 2012

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			\$500		\$500			
Maximum Potential Payout Per Employee	\$5,000	\$3,500	\$9,000		\$4,000	\$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.

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Carolina Institute
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