



# Battelle *for* Kids

## STRATEGIC COMPENSATION IN EDUCATION

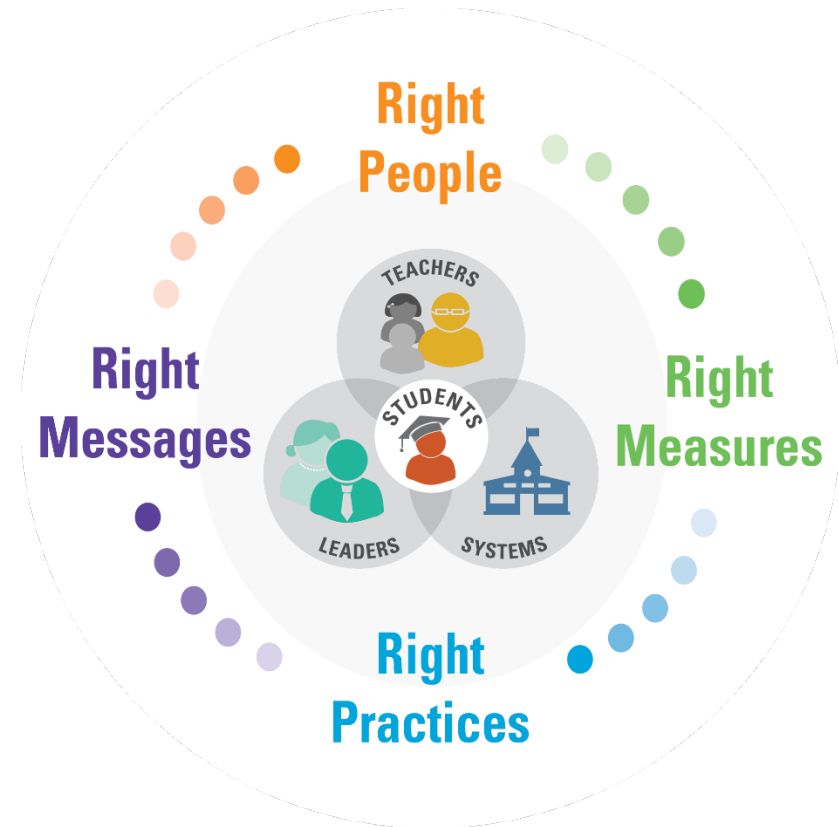
Tony Bagshaw, Managing Director, Human Capital

Presented to: The North Carolina Educator Effectiveness and Compensation Task Force

*March 17, 2014*

# About Battelle for Kids

- National, not-for-profit organization that provides strategic counsel and innovative solutions for today's educational-improvement challenges. Our approach:
  - ▣ **The Right People**—Developing and Aligning Human Capital Systems
  - ▣ **The Right Measures**—Measuring Educator and Employee Effectiveness
  - ▣ **The Right Practices**—Identifying and Supporting the Practices of Effectiveness Educators
  - ▣ **The Right Messages**—Engaging Stakeholders and Leading Change for Strategic Improvement



*At the heart of this work is an unwavering focus on accelerating student growth.*

# Presenter

## **Tony Bagshaw**

Battelle for Kids' Managing Director of Human Capital

21 years as a K–12 practitioner

6 years at Battelle for Kids

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# Battelle for Kids' Human Capital Strategy



# Our Strategic Compensation Clients

□ **Arizona:** Maricopa County Education Service Agency and Arizona Department of Education

□ **Colorado:** Mesa County Valley School District 51

□ **Florida:** Lee County Schools

□ **Georgia:** Fulton County Schools

□ **Indiana:** Lawrenceburg Community School Corporation

□ **Ohio:** 27 districts and the Ohio Department of Education

■ Examples: Cleveland Metropolitan School District, Ohio TIF

□ **Oklahoma:** Tulsa Public Schools

□ **New York:** Syracuse City School District

□ **North Carolina:** Charlotte-Mecklenburg Schools

□ **South Carolina:** Charleston County School District

□ **Tennessee:** 46 districts and the Tennessee Department of Education

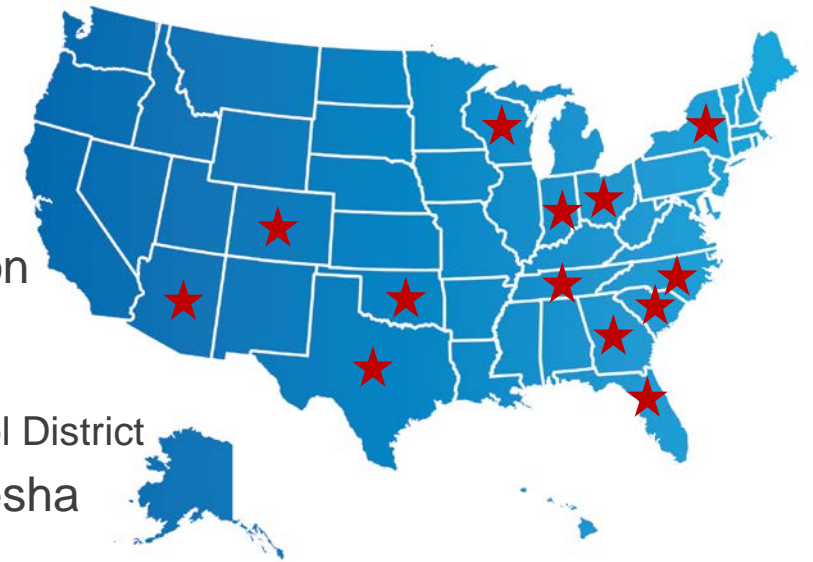
■ Examples: Metropolitan Nashville Public Schools, Shelby County Schools

□ **Texas:** 5 Districts

■ Examples: Houston Independent School District, Dallas Independent School District

□ **Wisconsin:** Oshkosh Area School District, School District of Waukesha

**Battelle for Kids has facilitated the design of nearly 100 compensation models across the country**



# BFK Strategic Compensation Roles

- ☐ Sit on steering committees and/or provide strategic counsel
- ☐ Support projects funded by Race to the Top and Teacher Incentive Fund grants
- ☐ Assist districts in applying for grants
- ☐ Provide marketing and communications support
- ☐ Facilitate learning sessions for districts, regions, or statewide consortia
- ☐ Survey or hold focus groups to assess perceptions/preferences of district staff
- ☐ Facilitate stakeholder teams to design bonus models, alternative compensation systems, and career ladders for P–12 teachers, career technical educators, building leaders, department heads, central office/support staff, and superintendents

## BFK Strategic Compensation Roles (cont.)

- ☐ Provide third-party reviews of compensation models
- ☐ Perform compensation studies, including job analysis, rewriting job descriptions, job evaluation, market analysis, and reviews of current compensation practices
- ☐ Provide thought leadership through conference presentations, publications, and research
- ☐ Create blended online learning opportunities
- ☐ Develop software solutions to calculate, communicate, and review compensation amounts
- ☐ Help design comprehensive human capital systems, with compensation as a component

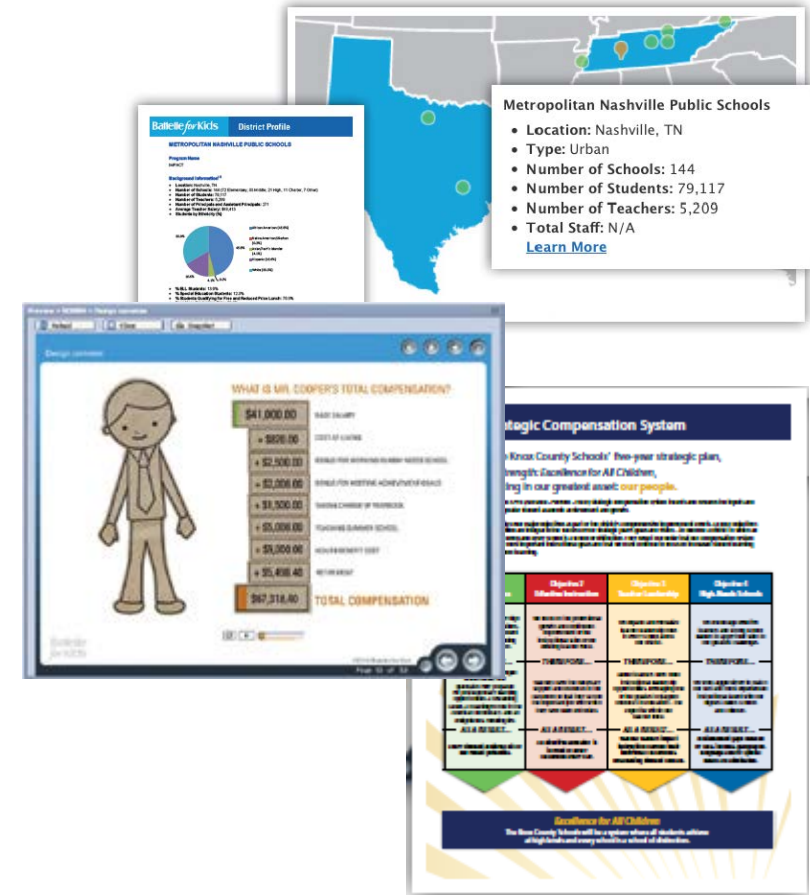
# Our Approach

# BFK's Compensation Philosophy

1. With, not to
  - Compensation systems must be created by local stakeholders to address local challenges
2. Both technical and adaptive challenges must be addressed
  - Technical: Nuts and bolts
    - Participation groups, eligibility criteria, types and levels of measures, data feasibility and management, fiscal sustainability
  - Adaptive: Hearts and minds
    - Promoting awareness, understanding, and transparency

# Phase One: Learning, Understanding, and Discussion

- ❑ Larger, more inclusive group of stakeholders
- ❑ Open discussion
- ❑ Blended learning using the Strategic Compensation Learning Suite:
  - ❑ **Online courses** to deepen understanding of strategic compensation
  - ❑ **Interactive gallery walk**, featuring educator compensation systems from across the country
  - ❑ **Research** and best practice articles
  - ❑ **Communication materials** from districts that have successfully implemented their compensation programs
  - ❑ Other practical resources and **hands-on activities** to encourage a thoughtful design process



## Phase Two: Compensation Model Design

- ☐ Subset of stakeholders from Phase 1
- ☐ Represents diverse stakeholder groups (building leadership, central office administrators, teachers of various grades and subjects)
- ☐ Collectively designs a compensation model that addresses the following:
  - Strategic Planning and Program Objectives
  - Participation Groups (Categorization)
  - Eligibility Rules
  - Award Model and Measures
  - Implementation Plan
    - ☐ Defined pay form, frequency, and timing
    - ☐ Professional development plan
    - ☐ Process for issue resolution
    - ☐ Implementation timeline

# Phase Three: Compensation Model Implementation

BFK•Award® is a web-based platform that helps school districts recognize excellence and deliver strategic compensation information in a secure, easy-to-interpret format.

## BFK•Award®: Helping Get Award Pay Right



Developing a strategic compensation system that aligns with educational improvement goals offers school districts the opportunity to recognize and reward instructional excellence. Well-designed programs can have a lasting impact on educator and student outcomes. Districts undoubtedly invest a significant amount of time and resources to research, design, implement, and sustain these systems.

**Maximizing Impact, Minimizing Disruption**  
Equally important is a district's commitment to getting award pay right—building trust in the program, engaging educators to ensure their award estimates are accurate, and resolving errors—with minimal diversion from classroom instruction.

Drawing on our experience partnering with more than 60 districts across the country, Battelle for Kids has developed BFK•Award® to help local education agencies (LEAs) manage the award payout process. This secure online system provides award program managers, building-level administrators, and staff with the opportunity to review important information and ensure the data used to calculate performance-based compensation are correct.




1,129  
LEAs across the country have used BFK•Award® to manage their awards.

59,922  
Educators have used the platform to review and affirm their award estimates.

\$192,178,681  
Using BFK•Award®, districts have awarded \$192,178,681 in award payments to educators.

0% Payout Error  
Battelle for Kids® has helped districts achieve 0% payout error, resulting in no "wrongly paid" awards.

BFK•Award® empowers educators to review, inquire, and affirm individual participation and performance measures—to guarantee those who have worked hard to earn an award are accurately compensated for their good work.



### Perkins, Diana (30099-5)

#### Award Summary: Demo Program

**Total Award: \$6,178.40**

#### Cummings Middle (ADD5\_102) - Campus %: (100.00%)

**Category: A4. Core Teachers - Middle School**

Description	Total Category Award
School Award (Teacher/Other Staff)	
Science Grade 6 (Individual/Team)	
6th Grade Team (Horizontal)	
Social Studies Grade 6 (Individual/Team)	
Middle School Science Team (vertical)	
Middle School Social Studies Team (vertical)	

**Total Category Award: \$6,178.40**

#### My Awards

Profile Awards

My Awards Manage Awards

School: Cummings Middle (ADD1\_102)

Award Program: Demo Program

Eligibility and Categorization	Eligibility and Categorization	Award Estimate	Eligibility & Categorization
Principal Review	Staff Review		

**Award Estimate**

Principal Review: Aug 14 - Aug 24, Ends in 4 days

Staff Review: Aug 24 - Aug 28, Begins in 4 days

**Support Team**

Lara, Jennie (principal)

**Resources**

Submit Question Submit Inquiry

#### Overview

48 %  
28 %  
24 %

● Not Eligible (17)  
● Eligible and Not Awarded (16)  
● Eligible and Awarded (21)

#### Member Acknowledged Award Estimate

100 %

● Not Acknowledged (64)  
● Acknowledged (0)

#### Award Estimates

\$123,456.00

Awarded

#### Staff Awards

Show: All

Member Name	Eligible	Category	Member Acknowledged Eligibility & Categorization	Member Acknowledged Award Estimate	Question Status	Award Amount
Austin, Sherry (30099-5)	✓	A4	✓	✓		
Austin, Ted (300128-5)	✓	B	✓	✓		\$2,000.00
Barker, Kurt (300325-5)	✓	A4	✓	✓		\$3,000.00
Barker, Andre (30056-5)	✓	A4	✓	✓		\$2,000.00
Burgess, Gilbert (300110-5)	✓	A4	✓	✓		\$3,000.00
Burns, Dan (300100-5)	✓	A4	✓	✓		\$2,000.00
Burns, Jennie (300128-5)	✓	A4	✓	✓		\$3,000.00
Campbell, Sandra (300088-5)	✓	A4	✓	✓		\$2,000.00



# Charlotte-Mecklenburg Schools Compensation Task Force

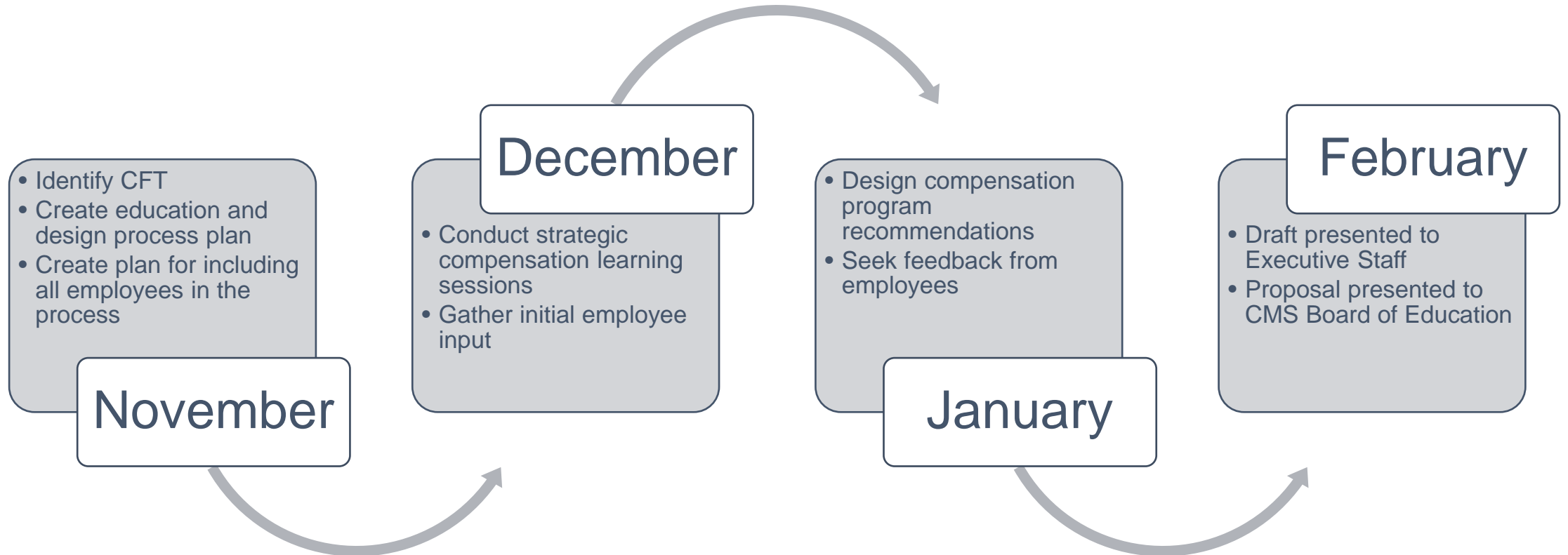
# Background

- In response to House Bill 950 [section 7A.10(a)], Charlotte-Mecklenburg Schools (CMS) convened a group of educators to participate in a Compensation Task Force (CTF).
- The goal of the CTF was to learn about strategic compensation and develop recommendations to inform the possible design of a compensation model.
- The CTF represented diverse groups: Central-office executives and staff, building leadership, traditionally and alternatively certified teachers of tested and non-tested grades and subjects, and the Charlotte-Mecklenburg Association of Educators.
- In addition, leaders from Gaston, Forsyth, Lee, Guilford, and Durham participated in CTF learning sessions.

# Timeline (November 2012–February 2013)

Timeline	Process Steps
Fall 2012	<p>Project Kickoff</p> <ul style="list-style-type: none"> <li>• Defined objectives and process</li> <li>• Shared district approaches in response to House Bill 950</li> <li>• Finalized key dates and touch points</li> </ul>
Fall–Winter 2012	<p>North Carolina district superintendents (and their identified design teams) were invited to attend a series of learning sessions to build foundational knowledge and establish a common language among districts.</p> <p>Learning opportunities included face-to-face sessions with the CMS Compensation Task Force, webinars, and online courses focused on the following objectives:</p> <ul style="list-style-type: none"> <li>• Describe the various types of compensation models and explain the differences between them, as well as their strengths, weaknesses, opportunities, and threats.</li> <li>• Discuss the role and importance of comprehensive human capital in strategic compensation.</li> <li>• Identify trends and best practices in educator compensation.</li> <li>• Explain how compensation practices from the private sector can inform similar efforts in education.</li> <li>• Apply research, best practices, and national trends in compensation model design and sustainability to local needs and contexts.</li> </ul>
Winter 2013	<p>Touch Point #1</p> <p><u>Objective:</u> Learn from each other through discussion of planned process for gathering employee input, engaging in design, and communicating with stakeholders.</p> <p>Touch Point #2</p> <p><u>Objective:</u> Share design goals, objectives, and overarching constructs.</p> <p>Touch Point #3:</p> <p><u>Objective:</u> Each district will deliver a brief presentation to share their draft plans, followed by group discussion and Q&amp;A.</p>

# Compensation Task Force Process





# Questions?



# Battelle *for* Kids

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