



REACH FURTHER.

Evaluation Handbook

2009-2010



Global competitiveness starts here.



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Introduction

The purpose of this Handbook is to provide information helpful to administrators and supervisors regarding the management of employee performance and behavior.

The primary focus of this Handbook is on instructional and other licensed staff. This Handbook also includes information helpful in managing the performance and behavior of other employees.

This Handbook is to serve as a guide only to assist administrators and supervisors in the Charlotte-Mecklenburg Schools with the Performance Management Process. This Handbook is not intended to be nor does it constitute an express or implied contract of any kind in favor of employees. Specifically, this Handbook does not extend to employees any contractual rights, claims or privileges, and is not intended to create any type of agreement for employment or continued employment.

In addition, nothing in this Handbook shall in any way be interpreted to supersede or in any way modify any employment contract or any policies or regulations adopted by the Board of Education or the Administration, which at all times shall control. Moreover, the failure of an administrator or supervisor to follow the provisions in this Handbook shall not be used to invalidate the evaluation process, nor shall it constitute or be construed as evidence that the evaluation process was conducted improperly.

This handbook is available online to all CMS employees.

ACRONYMS AND DEFINITIONS

BTSP	Beginning Teacher Support Program (formerly Initial Licensure Program)
CC	Call Center
CMS	Charlotte-Mecklenburg Schools
CR	Career – Status code for Career Status employees (formerly designated as tenured)
CSC	Customer Service Center
DPI (SDPI)	State Department of Public Instruction – Regulatory education agency for the North Carolina General Assembly
EAP	Employee Assistance Program
ER	Employee Relations
FLSA	Fair Labor Standards Act
FMLA	Family Medical Leave Act
HOUSSE	High Objective Uniform State Standard of Evaluation – Evaluation used as an alternative way for not-new teachers to demonstrate competency in each core academic subject a teacher teaches
HQ	Highly Qualified
HR	Human Resources
HRIS	Human Resources Information Systems
HRM	Human Resources Managers
IGP	Individual Growth Plan – required by the NC Department of Public Instruction to remediate or enhance job performance as evaluated on the performance appraisal instrument
IHE	Institution of Higher Education
INTASC	Interstate New Teacher Assessment and Support Consortium – Group which originated the standards that reflect the requisite knowledge, skills, and attitudes necessary for teachers starting their careers. (See appendices)

LAWSON	Lawson – Combined Human Resources and Financial Business System
LEA	Local Education Agency
LO	Liquid Office – Renamed 2009-10 as My Performance Manager – “MyPAM”
MyPAM	My Performance Appraisal Manager (formerly Liquid Office) - Online information system used for documenting performance of teachers and other licensed staff’s observations and evaluations
MyPD	My Professional Development – Online in-service system used to register for workshops offered within CMS
NBPTS	National Board for Professional Teaching Standards – Evaluation system for employees with three (3) or more years of teaching experience that will certify teachers who meet high and rigorous national standards established by the profession.
NCGS	North Carolina General Statutes
NCLB	No Child Left Behind – Federal Education law enacted January 2002
NCPAS/ TPAS	North Carolina Performance Appraisal System/Teacher Performance Appraisal System – State evaluation system required for all non-career status employees, for career status employees on probationary (conditional) status, for career status employees on remedial status for the Level 1 and Level 2 bonus, and for other career status employees not participating in another evaluation system.
NTE/ PRAXIS	National Teacher Examination/PRAXIS – Examinations required by the North Carolina Department of Public Instruction, for licensed employees, consists of one to two specialty area tests depending upon the licensure area.
PAI	Performance Appraisal Instrument – Evaluation instrument under the North Carolina Performance Appraisal System
PDC/PD	Professional Development Center/Professional Development
RALC	Regional Alternative Licensing Center
SPI	Standard Professional I License – License issued to first time license holders who have completed approved teacher education programs (in-state or out-of-state). Formerly initial or probationary license.
SPII	Standard Professional II License – Licensed issued once requirements for SPI have been completed. Formerly continuing license.
TN	Tenured – Previous status code for career status employees.

- TPAI** **Teacher Performance Appraisal Instrument** – Evaluation instrument for teachers under the NC Performance Appraisal System.
- TPAI-R** **Teacher Performance Appraisal Instrument** – Revised – Evaluation instrument for teachers under the NC Performance Appraisal System, effective July, 2000.
- VIF** **Visiting International Faculty**

NC
PERFORMANCE
APPRAISAL SYSTEM
FOR
INSTRUCTIONAL
AND
OTHER LICENSED
STAFF

A = Announced
U = Unannounced

“MyPAM” (formerly Liquid Office), an online document management system, was implemented in 2007-08 and replaced the paper process for teachers on TPAS. LO captures observations and eliminates the paper evaluation forms and keying of mid-year and end-of-year forms.

I. SUMMARY OF TEACHER EVALUATION PROCESS

<u>NON – CAREER STATUS</u>	<u>CAREER STATUS (TENURED)</u>
<p>3 Formal Observations (1A, 1U, 1A/U) (Form #4171) *Informal Conference prior to Announced Observations >1 Peer Observation (Form #4171, 4117.02I, 4117.00I) * Post Conference and signature within 5 days after each formal observation >IGP (IL1-3 and LL1-3 – beginning teacher form) or IGP (PB1 and LL4-5 – experienced teacher form) >Mid-year Appraisal >End-of-year Evaluation (Form #4117.02) <i>An Action Plan may be used at anytime to address performance problems.</i></p>	<p>(CR) FORMATIVE CYCLE (future year) 4 YEARS OF 5 (License expires 2011, 2012, 2013 and 2014) >2 Observations - Snapshots >IGP (experienced teacher form) >Mid-year Appraisal >Formative Evaluation Form Final Verification (4117.02 Exp. Form)</p>
<p><u>PB2-PB30 PRINCIPAL’S CHOICE</u> A (PB) TPAI 3 Formal Observations (1A, 1U, 1A/U) *Informal Conference prior to announced Observation *Conference and signature within 5 school days >1 Peer Observation (4171, 4117.00I) >IGP (experienced teacher form) >Mid-year Appraisal >End-of-Year Evaluation (4117.02)</p>	<p>(CR) SUMMATIVE CYCLE 1 YEAR OF 5 (License expires 2010) >1 Full Review (TPAI Full Review) *Pre-conference Interview – 2 days prior 4175 and 4176) *Post-conference within 5 school days *Report signed within 15 school days >2 Observations - Snapshots >IGP (experienced teacher form) >Mid-year Appraisal >End-of-Year Evaluation Form Final Verification (4117.02 Exp Sum)</p>
<p>B (PB) SUMMATIVE CYCLE 1 Full Review (TPAI Full Review) Pre-conference Interview – 2 days prior (forms 4175 and 4176) *Post-conference within 5 school days *Report signed within 15 school days >2 Snapshots >1 Peer Observation (4171, 4117.00I) >IGP (experienced teacher form) >Mid-year Appraisal >End-of-Year Evaluation Summative Form Final Verification <i>Option B may <u>not</u> be used if the teacher is on an Action Plan</i></p>	<p><u>ACTION PLANS</u> An Action Plan should be used following a below standard or unsatisfactory rating on a performance evaluation, unless the Superintendent recommends non-renewal, demotion or dismissal. An action plan may be implemented after a below standard observation at the discretion of the administrator. <i>A teacher who is employed after completing an Action Plan should next be evaluated on the normal Summative Cycle.</i></p>
<p><u>ACTION PLANS</u> An Action Plan should be used following a below standard or unsatisfactory rating on a performance evaluation, unless the Superintendent recommends non-renewal, demotion or dismissal. An action plan may be implemented after a below standard observation at the discretion of the administrator. (See next page for other career status codes)</p>	<p><u>EXPERIENCED PART-TIME OR RETIRED TEACHERS</u> Experienced part-time and retired teachers should be treated the same as career teachers for observations and evaluations.</p>

BELOW STANDARD NOTIFICATION - There will be an email notification sent to the Principal, HR Manager and ER whenever there is one below standard rating in functions 1-6. A below standard request form will be generated. The Principal will have the option to complete a full appraisal review. Two or more below standard ratings in functions 1-6 will automatically generate 4117.02 Full- Review for completion. The Full Review must be completed within five (5) days.

Listed below are the status codes for those employees who should be observed using the Non-Career Status Evaluation Process on the left side of the previous page.

IL10, 20, 21, 30, 31, 32

LL01, 02, 03

VL01, 02, 03, 04, 05

PB10, 20*, 30*, 40, 41

PL01, 02, 03, 04, 05

IL01, 02, 03, 04, 05, 06

V0010, 11, 12

V0410

VE00

FT00*

Note: Snapshot observations **should not** be used to observe individuals who have the above status codes.

*Only status codes used for Principal's Choice A & B

The NC Performance Appraisal System (*NCPAS*) is used annually for all licensed personnel including interim, end-of-year, lateral entry, and part-time personnel employed in CMS two months or more.

All administrators who use the Teacher Performance Appraisal Instrument-Revised (*TPAI-R*) to observe and evaluate teachers must have successfully completed the twenty-four hour State Teacher Performance Appraisal Instrument (*TPAI*) and the *TPAI-R* training.

Teachers performing a peer observation* should have successfully completed State *TPAI* training or Professional Development Center (PDC) sponsored mentor training, which included the *TPAI*.

Principal interns, Deans of students and Lead teachers (i.e. Department Chair, Literacy/Academic Facilitator) may conduct observations if they have completed the *TPAI-R* training. **These persons, however, may not complete end-of-year evaluation forms, conduct end-of-year evaluation conferences or sign end-of-year evaluation forms.**

II. Observations

Non-Career Status

- Observations are based on the Performance Appraisal Instrument appropriate for each position. The raw data are collected using either the Formative Observation Data Instrument (FODI, #4117.00I) or a script tape. The report is written on the Teacher Observation Report. Formal observations are either announced or unannounced.
 - Employees whose assignments are six months or more receive a minimum of three observations – one announced, one unannounced, and one announced or unannounced by a properly trained administrator and a peer observation* is required by a properly trained teacher (**preferably not the teacher's assigned mentor**). Paid mentors may be assigned to observe teachers who are not their assigned mentee.
 - Additional formal and informal observations may be appropriate.
 - Observation dates by administrators for Beginning Teachers are due as follows:
 - by November 20, 2009
 - by February 5, 2010
 - by April 23, 2010
- * The peer observation should be completed prior to April 23**
- Employees with less than six months of employment, hired prior to March 1, are subject to observation deadlines and requirements, which occur during their time of employment. A minimum of two formal observations with the first being announced and the second unannounced are required. (For additional details, refer to the Appendices for deadline dates.)
 - Employees hired on or after March 1 should receive the Human Resources End-of-Year Reference Form based on at least one formal observation. (For additional details, refer to the Appendices for deadline dates.)

NOTE: Principals/supervisors should provide employees with copies of all evaluations and formal observation instruments, upon employee's request. Also, employees may print a copy of evaluations and observations from "MyPAM."

III. Conference/Observation Process

A. Non-Career Status

- Where practicable, at least three (3) days prior to an announced observation, the person conducting the observation (the observer) contacts the employee to arrange details of the observation. At this time, the employee shares general information about the lesson or activity to be observed. **NOTE: Pre-conference questions (Forms 4175 and 4176) are suggested for use with experienced teachers. An example of questions for a beginning teacher's informal conference, prior to announced observation, could be as follows: Tell me about the lesson I will see. Are there any special provisions for students we should discuss?**
- During the observation, the observer completes an informal script tape that contains the raw data of the observation.
- Other evaluative data and general performance issues noted throughout the school year are collected on a continuous basis and compiled periodically for consideration and inclusion on a TPAI observation report, in the mid-year appraisal, and in the end-of-year evaluation.
- Following the observation and an analysis of the raw data, the observer completes the TPAI observation report.
- Information included on the last page of the TPAI observation report reflects a synthesis of the report. Factors that had the greatest impact on the lesson, both positively and negatively, are addressed. However, all information included in each function of the report is helpful when reviewing documentation to assist in professional growth and when looking for patterns of performance for end-of-year evaluation. Comments are a required part of the evaluation that must be completed in "MyPAM".

"STRENGTHS" indicate those functions or qualitative practices within a function that are "*Above Standard*" level of performance. Strengths go beyond what one would normally expect.

"RECOMMENDATIONS FOR GROWTH" indicate those functions or practices that are "*At Standard*," and could be improved to an "*Above Standard*" level.

"AREAS THAT NEED IMPROVEMENT" refers to those functions or practices of the Performance Appraisal Instrument (PAI) that do not meet an "*At Standard*" level of performance. Statements made under "*Areas That Need Improvement*" generally address an entire function. If a practice is noted under "*Areas That Need Improvement*," this practice has a significant impact on the overall performance within that function, bringing it to a "*Below Standard*" or "*Unsatisfactory*" level.

- All formal observations are followed by a post-observation conference between the employee and the observer. This conference **should** be held within **five** working days of the observations when practicable.

- During the conference, the observer shares the FODA with the employee. The employee signs the FODA to indicate that the FODA was received and reviewed. If the employee refuses to sign the FODA, the observer/supervisor may note the employee’s refusal at the bottom of the form. The original copy of the FODA and the response (if applicable) are retained in the portfolio and kept in the school office only when completed manually. Documents completed in “MyPAM” are automatically stored and accessible electronically in the employee’s file. If the employee does not concur with the FODA, he/she may write a response on form #4117.00R.

Note: Snapshot observations and Three Minute Classroom Walk-Throughs can only be used for non-careered teachers with a status code of PB20 or PB30.

B. Licensed Support Staff

- Employees assigned to licensed support positions (i.e., media specialists, SSS, counselors, psychologists, speech/language pathologists, etc.) are observed using the appropriate appraisal instrument for their position.
- Licensed support staff that has not obtained career status can be observed three times by an administrator and once by a peer, as required by the State. Peer observation can be a classroom teacher observation of a guidance lesson in a classroom (must be a TPAI trained teacher).

For further information on observing and evaluating licensed support staff, contact the following office or individual for the position listed:

Position	Contact Person	Telephone Extension
Media Specialists	Gloria Miller	343-2663
Secondary School Psychologists	Carolyn Gaither	343-7426
School Social Workers	Brenda Kendrick	343-6601
School Counselors	Cheryl Robinson	343-3726
Audiologists, Occupational/Physical Therapists, Speech/Language Pathologists	Barbara Slingerland	343-2732
Technology Facilitators	Jerry Shepardson	343-8122
Exceptional Children	Anita Lamb	343-2721

NOTE: Only Certified Counselors, Social Workers, Student Services Specialists, and School Psychologists can observe in an individual or group counseling session.

C. Career Status

The observation process for career status teachers is outlined under the Summary of Teacher Evaluation Process.

With respect to the Snapshot observations that are required for career status teachers, there is no time limit for how long the observer needs to stay in the class, but the observer should have enough data to evaluate several of the TPAI-R major functions. A “not observed” scoring category is provided for when the observer either does not observe or feels that there is not enough information to evaluate a particular function. A pre-conference is not required and a post-conference is only required if the teacher scored below standard on any major function. A copy of the Snapshot evaluation form should be given to the teacher and the teacher may request a conference if clarification is needed. The Snapshot long form #4179 or the Snapshot short form #4177 may be utilized to document the observation.

Observers are not limited to two Snapshots when observing and documenting the performance of experienced teachers. In addition, in lieu of one of the two required Snapshot observations, observers have the option of conducting short 3 to 5 minute walk-through observations in the classroom at different times of the year, in order to get an assessment of the teacher’s performance in several specific functions over a period of time.

If the observer would like to use walk-throughs to evaluate the teacher’s performance on one Snapshot, the observer should document the performance observed after each walk-through on the Walk-Through Form and should conduct at least four such walk-throughs to compile the one Snapshot observation. When the fourth walk-through is conducted, the Snapshot short form #4177 should then be completed to provide the overall comments on the functions that were observed in the four walk-throughs, and the walk-through forms should be attached to the Snapshot form as evidence supporting the functions being evaluated. The “time observed” category on the Snapshot form should document the total time spent on the four or more walk-throughs that support that Snapshot observation.

In addition, whenever the Walk-Through form is utilized over the course of the evaluation process, it is recommended that a copy of the completed form be provided to the teacher shortly after the walk-through is conducted and that if appropriate, the observer gives verbal feedback to the teacher about the performance observed.

In lieu of the use of walk-throughs, evaluators may choose to use walk-throughs and the Walk-Through form as additional direct observation and documentation of specific functions to be evaluated. When this occurs, the walk-throughs will simply serve to supplement the two Snapshots in formulating the overall evaluation of the teacher’s performance.

IV. Individual Growth Plan

- All licensed employees must complete an Individualized Growth Plan (IGP) if they are in full-time or part-time (20 hours or more) positions for 120 working days or more if 10-month employees, or 145 days or more if 12-month employees.
- The IGP should align individual growth and licensure requirements to the:
 - INTASC Standards (Beginning Teachers)
 - School improvement plan
 - Licensure area
 - State strategic priorities of higher student achievement, safe and orderly schools, quality teachers and effective/efficient operations, and
 - Standards for knowledge and skills of professionals in that job category
- Each IGP must be written on the appropriate form, either the “Beginning Teacher Individualized Growth Plan” Form #4160 (beginning teachers and lateral entry teachers) or Form #4161 (revised 2001-2002 all other certified employees).
- The main objective of the IGP is meaningful and appropriate professional growth.
- The IGP should include long-range goals, but it must involve activities that are to be completed within the school year. The emphasis is on the goal and activities, and not focused on the evidence of activity completion.
- The IGP should be approved by the principal/supervisor by the end of the first quarter, and reviewed at mid-year by a mentor, peer or administrator to determine appropriate revisions.
- The IGP must be reviewed and signed annually by an administrator and submitted to HR with the end-of-year evaluation.
- On the NCPAS, the evaluation of the IGP is reflected in the ratings of the functions dealing with professional growth. If all scheduled activities are completed at an acceptable level, then the rating is “At Standard.” Higher ratings reflect the quality of the IGP. If the IGP is incomplete or the quality is unacceptable, the appropriate function is rated “Below Standard.”

V. Mid-Year Appraisal

- A mid-year appraisal should be conducted for licensed employees. This review is a formative appraisal of employees’ progress towards achieving performance expectations and standards. Documentation from observations and other evaluative data may be used in the appraisal process.
- The review is documented on the Mid-year Appraisal Form (#4117.00M). If performance problems are noted, a performance appraisal instrument also should be completed (using the end-of-year evaluation Form #4117.02 for non-career status teachers and the TPAI – Full Review Form #4117.02F for career status teachers with comments and ratings under all functions.

- Individuals with “*At Standard*” or above performance should have Mid-year Appraisals filed in the school portfolio only when the mid-year is completed manually. Mid-years completed in “MyPAM” are automatically stored electronically in the employee’s file and accessible by the school administrator. The following documentation should be submitted to Employee Relations for individuals with “*Below Standard*” performance:
 - Mid-year appraisals
 - Full evaluation
 - Action plan
- When employees receive a “*Below Standard*” performance on mid-year appraisals in “MyPAM,” the principal should contact their Employee Relations to review and discuss the action plan process.
- Evaluation data entry instructions, for employees not in “MyPAM,” will be provided electronically upon the implementation of new HR information system (LAWSON).
- When keying the mid-year appraisal on employees not in “MyPAM,” please refer to the designation of the type of appraisal (N,F,S)
- {N (NC/Performance Appraisal), F (Formative Cycle), S (Summative Cycle)} must match the data entered at the end of the year.

VI. End-of-Year Evaluation

- An end-of-year evaluation is conducted by the principal/supervisor or designee for all licensed employees at the end of the school year or, if employed three or more months, at the end of employment. Where practicable, complete an end-of-year evaluation for individuals going on leave who may not return prior to the end of the school year; otherwise, it should be done before the end of the school year.
- End-of-year evaluations completed prior to the regularly scheduled due date should be submitted and keyed with those end-of-years completed at the end of the year.
- Although performance may be satisfactory during one half of the school year, the end-of-year evaluation is a summary of job performance for the entire school year.
- The current and appropriate state approved performance appraisal instrument for each licensed position must be used for the end-of-year evaluation.
- When keying the end-of-year evaluation, the type of appraisal must match mid-year type (N, F, S).
- The supervisor is encouraged to use specific statements or examples about any performance concerns.
- All administrators who provide data to the end-of-year evaluation are involved in a consensus process. Although a designee may prepare the written documents, the principal/supervisor is responsible for reviewing all of the data and co-signing the forms. The signed end-of-year evaluation becomes part of the employee’s personnel file.

- If a principal is recommending the non-renewal of an employee's contract, supporting documentation should be forwarded to the Employee Relations for that school. Such documentation includes, but is not limited to, the end-of-year evaluation, the mid-year, written observations, memos and notes regarding performance, action plans, or similar documents.
- Beginning Teachers in their third year (IL3) and probationary teachers in their fourth year (PB40 and PB41) must obtain all "at standard" ratings on their end of year evaluation in order to be recommended for Standard Professional License II licensure (IL3) or career status (PB40 and PB41).
- Any changes to an End-of-Year Evaluation must be approved by the Superintendent.

VII. Action Plan

(A Sample Action Plan is presented on page 19)

- An Action Plan or plan for improvement of performance must be implemented for each licensed employee who receives a below standard or unsatisfactory rating on a performance observation/evaluation (mandatory for functions 1-6), unless the superintendent chooses to recommend dismissal or demotion of the employee. Assistance is available from Employee Relations and your HR Manager (see contacts page 54).
- For State designated low performing schools, an evaluation of all licensed staff must occur early in the year so that if there are deficiencies an action plan can be developed at that time.
- For further information, see CMS Policy regarding Accountability of Instructional Staff/Action Plans for Improvement of Performance (CMS Policy #GCOB).
- **An employee can be placed on an Action Plan at any time the administration deems it necessary to address inadequate performance.**

SAMPLE

Note: The following is a sample Action Plan #4117.02H. The content and clarity is more important than the format in which it is written. A narrative or table format can be used. It is important that the key elements listed below are incorporated into the individual's Action Plan. (Action Plan Template Form#4117.02G can be found under the online CMS Forms Manual.)

Name _____ Soc. Sec. # _____ Subject/Grade _____
 School _____ Plan Date _____ to _____
 Check the Major _____ I. Instructional Time _____ V. Instructional Feedback
 Functions _____ II. Student Behavior _____ VI. Facilitating Instruction
 Needing _____ III. Instructional Presentation _____ VII. Communicating within the Educational Environment
 Improvement: _____ IV. Instructional Monitoring _____ VIII. Performing Non-Instructional Duties

Area(s) Needing Improvement	Goal(s)	Strategies/Resources Available	Evidence(s)	Time Frame*	Checkpoint Date(s)	Final Completion Date
The quality of student time-on-task is adversely affected by the teacher's failure to plan meaningful, interesting, and challenging assignments which appropriately match the needs of students	Provide a variety of challenging and interesting learning opportunities for all students	<p>Turn in lesson plans for the upcoming week by 8:00a.m. each Friday. Include objectives, activities, and monitoring strategies.</p> <p>Read <u>Differentiation of Instruction in Mixed Ability Groups</u></p> <p>Enhance the quality of center activities by clearly defining objectives, activities, and outcomes.</p> <p>Utilize assessment information to appropriately match student's needs to learning activities.</p>	<p>Weekly plans and Conferences submitted to Mr./Ms. _____, Principal</p> <p>Written summary of book and plan for implementation of new ideas reported to Mr./Ms. _____ Asst. Principal</p> <p>Copy of center activities and examples of student work completed presented to Mr./Ms. _____ Asst. Principal</p> <p>Copies of individual contracts, samples of center activities using Bloom's taxonomy, and lists of flexible groups for reading and math turned in to Mr./Ms. _____ Lead Teacher</p>	<p>Jan. 30 to Apr.30</p> <p>March 2</p> <p>March 20</p> <p>Weekly (with lesson plans)</p>	<p>Feb. 30</p> <p>March 30</p>	

Resources Available: If particular individuals will provide support in accomplishing the Action Plan, identify the individual and the support he/she will provide in the Evidence(s) Column. Key supporters may include: Administrators, Literacy Facilitator, A. G. Lead Teacher, K-3 Team, Professional Resource Materials (Media Center), Curriculum Resource Center (Professional Development Center).

THE SIGNATURES BELOW INDICATE THAT THIS DOCUMENT AND ITS CONTENTS HAVE BEEN PRESENTED AND THOROUGHLY DISCUSSED WITH THE EMPLOYEE. THE TEACHER'S SIGNATURE ALSO INDICATES THE EMPLOYEE UNDERSTANDS THAT COMPLETION OF THIS PLAN DOES NOT RELIEVE THE EMPLOYEE OF HIS/HER OBLIGATIONS TO SATISFACTORILY PERFORM HIS/HER JOB DUTIES AND ADDITIONAL DISCIPLINARY ACTION MAY BE TAKEN DURING OR AFTER THIS PLAN EFFECTIVE DATE. IN ADDITION, THE EMPLOYEE HAS BEEN GIVEN THE OPPORTUNITY TO PROVIDE INPUT AND MAKE SUGGESTIONS TOWARD THE DEVELOPMENT OF THIS PLAN. THE EMPLOYEE HAS BEEN GIVEN A COPY OF THE FINALIZED AND SIGNED DOCUMENT.

Signatures

Teacher: _____
 Principal: _____
 Assistant Principal _____
 Initial Conference Date: _____
 Review Date: _____
 Review Date: _____

Date: _____
 Date: _____
 Date: _____

CC: Employee, Principal, HR Manager, Employee Relations and Licensure Administrator (If Action Plan is for an IL Employee)

* Meeting time frames is important. However, meeting these time frames is no substitute for consistent and sustained, positive performance.

CMS
APPRAISAL
SYSTEM
FOR
ASSISTANT
PRINCIPALS

Assistant Principal Evaluation Process

Assistant Principals (AP) are under administrative contracts and do not hold career status. They should be evaluated with the CMS Assistant Principal Performance Appraisal System (4117.06). A Mid-Year appraisal and End-of-Year evaluation are required. At any time, especially if performance problems are evident, or during contract renewal years, additional visits/observations may be completed as desired using the mid-year/counseling form #4117.06M.

Draft documentation of mid-year appraisals for Assistant Principals must be submitted to the Area Superintendent by December 18

In the final year of the AP's contract, it is recommended that the principal conduct the mid-year evaluation no later than January 20.

If the principal is going to recommend nonrenewal, the principal needs to submit his or her recommendation and all supporting documentation to the Area Superintendent and the Director of HR Special Programs by March 26.

If the Superintendent is going to recommend the nonrenewal of the assistant principal's contract, notice of that decision must be communicated by the Superintendent or designee to the assistant principal by April 27 of the final year of the contract.

Assistant Principals eligible for and recommended for contract renewal or under continuing contract should have their end-of-year evaluation completed and submitted by May 7.

STATUS
CODES
AND
PREFIXES

I. STATUS CODES PRIOR TO CAREER STATUS

Status Level	Definition
NT01	New Teacher; Less than 120 days; eligible for paid mentor (time does not count towards Beginning Teacher Support Program (BTSP) or career status)
NT10	New Teacher; Less than 120 days; experienced teacher, no mentor assigned (time does not count towards career status)
IL01 IL02 IL03 IL04 IL05 IL06	Standard Professional License I; Beginning Teacher; Part-time, more than 6 months employment; eligible for paid mentor (time does not count towards career status but does for Beginning Teacher Support Program)
LL01 LL02 LL03	Lateral entry (time does not count towards career status; year 1-5); LL01 & 02 eligible for paid mentor
VL01 VL02 VL03 VL04 VL05	Vocational provisional license (time does not count towards career status; year 1-5); VL01 & 02 eligible for paid mentor
PL01 PL02 PL03 PL04 PL05	Provisional license only without a clear licensure area (time does not count towards career status; year 1-5); PL01 (only) is eligible for a paid mentor, unless the support position employee has previous classroom experience
IL10 IL20 IL30 IL21 IL31 IL32	Initially Licensed, first year (first year towards career status); eligible for paid mentor Initially Licensed, second year (second year towards career status); eligible for paid mentor Initially Licensed, third year (third year towards career status); eligible for mentor (unpaid) Initially Licensed, second year (first year towards career status); eligible for paid mentor Initially Licensed, third year (first year towards career status); eligible for mentor (unpaid) Initially Licensed, third year (second year towards career status); eligible for mentor (unpaid)

PB10	Probationary status; experienced teacher, first year towards career status; serve minimum one year on Standard Professional License I (SPI) (Includes validated expired continuing licenses.)
PB20	Probationary status; experienced teacher, second year towards career status; has Continuing License or Standard Professional License I or II (SPI or SPII) (Includes validated expired continuing licenses.)
PB30	Probationary status; experienced teacher, third year towards career status; has Continuing License or SPI or SPII (Includes validated expired continuing licenses.)
PB40	Probationary status; experienced teacher, fourth year; eligible to earn career status; has Continuing License or SPII
PB41	Probationary status; experienced teacher, previous career status in NC (continuing employment decision must be made at the end of the year); has Continuing License or SPII. (Includes validated expired continuing licenses.)

II. STATUS CODES AFTER CAREER STATUS

Status Level	Definition
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CR Career; career status obtained (formerly TN)

III. NON-CAREER STATUS TRACK STATUS CODES

Status Level	Definition
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AP00 Assistant Principal (number after status will reflect contract expiration date) *Note: 00 reflects Principal Fellows*

CO00 Central Office staff

FT00 Interim/End-of-Year or Full-time employees, 80%-100% employment status (does not track towards career status)

PR00 Principal (number after status will reflect contract expiration year) *Note: 00 reflects New Leaders for New Schools*

PT00 Part-time employees (non-career status track, >3 yrs. exp.)

RA00 Rehired retired administrator (any school-based, licensed retiree not on teacher/psychologist pay schedule)

RT00 Rehired retired teacher (does not track towards career status)

V0000 Visiting International Faculty (numbers after status reflect contract expiration date)

V0410 Visiting International Faculty - 4th Year (04 reflects 4th year – 10 reflects contract expiration date)

VE00 Work Visa Employees

IV. PREFIXES TO STATUS CODES FOR LICENSURE REQUIREMENTS

- B Banked status for upcoming school year
- D Validated licenses – 5 credits per year required, which may include content and reading methods credits
- E PRAXIS test requirement
- F Paperwork not yet filed with CMS/State for licensure; any test or course work requirement must also be met
- H Hold status from rolling due to leave of absence
- I Interim/End-of-Year Employee (does not track towards career status)
- J Lateral Entry/Vocational-1st or 2nd Year–6 semester hrs. needed for each year
- K PRAXIS and course work needed (example: lateral entry or vocational)
- L Licensure Department Review – Paperwork pending for a clear license
- O BTSP SPI license – Additional requirements needed to convert to SPII in 3rd year of BTSP (Praxis II or HOUSSE or Verification of Ability to Impact Student Learning Form)
- P Prior year requirement remaining to be addressed immediately – Consult Licensure Case Manager
- Q Final year – all requirements must be met
- R Resignation (End-of-Year)
- T One year successful teaching to clear license
- U 6 semester hours needed for the year
- V Visiting International Faculty, employment by VISA
- W All credit hours must be completed for license renewal
- Y School Leadership Series Exam – Clear license in teaching area
- Z Critical 2 year licensure deficiency – Consult Licensure Case Manager

For Licensure Dept. Use Only:

- G Used only during contract renewal
- S Used only during contract renewal & for Retirees Suspending their Retirement Payment

OBTAINING

CAREER

STATUS

IN

CMS

CAREER STATUS

I. Career Status Generally at CMS

The Charlotte-Mecklenburg Board of Education Policy #GCF states:

“The awarding of career status is not an entitlement based on four consecutive years of service, but a status which may be earned through the exhibition of high performance. The Board seeks performance in excess of “*At Standard*” and seeks to employ and maintain professionals who are performing at the highest level of competence. Professionals must meet the minimal rating requirements on the Performance Appraisal Instrument to be eligible for favorable consideration by the Board for career status.”

- Career Status does not transfer from state to state or district to district.
- Principals, directors, supervisors, and assistant principals promoted or employed after July 1, 1995, who did not have or achieve career status as a school administrator by June 30, 1997, are ineligible to obtain career status as an administrator [NCGS§115c-287.1 and 115C-325©(3)]. Employment as a licensed administrator will be based on contractual agreement. Administrators not required by statute to be employed under contract are at-will employees.

II. Employees Who Have Never Obtained Career Status

The NCGS §115C-325(C) (1) regulates career status (formerly referred to as “tenure”) for positions requiring licensure.

- “When a teacher has been employed by a NC Public School System for four consecutive years, the Board, near the end of the fourth year, shall vote upon whether to grant the teacher career status. The Board shall give the teacher written notice of that decision by June 15.” (See definition of teacher in NCGS § 115C-325, which defines eligible licensure status for tracking towards career status.)
- A year, for the purpose of computing time as a probationary teacher, is not less than 120 working days performed as a probationary teacher in a full-time, permanent teaching position during the school year.
- A probationary teacher is a licensed employee, other than a Superintendent, Associate Superintendent or Assistant Superintendent, who has not obtained status as a career teacher and whose major responsibility is to teach or supervise teaching.

III. Employees with Previous Career Status in North Carolina (PB41)

- A decision regarding continuing employment for a previously tenured teacher must be made within one year, rather than the previous option of one or two years. Teachers should receive three formal observations, the peer observation, and a full end-of-year evaluation using form 4117.02, TPAI-R. In order to reinstate career status in one year, the teacher must obtain “*at standard*” ratings in all functions on the end-of-year evaluation.

- Career Status may be awarded at the end of the year if:
 - Recommended by the principal/supervisor
 - End-of-year evaluations ratings are “*At Standard*” in all functions of the appropriate performance appraisal instrument

IV. Employees with Interrupted Career Status Eligibility

- Career status is interrupted if the employee:
 - resigns from CMS
 - works less than 120 days within 215-day school year
 - moves to a position less than 100% employed or
 - transfers to a non-licensed position

LICENSURE

(CERTIFICATION)

I. Overview

All individuals employed in positions requiring NC licensure must hold the appropriate license for the subject or grade level taught or the professional assignment held.

- Both state and local salary ratings are assigned for NC licensed personnel based on degree level and years of experience on the state license.
- Individuals who do not hold NC licensure or who have expired NC licenses:
 - Must complete the licensure process within thirty (30) days after employment, and
 - Will be paid at the bottom of the scale, bachelor's level, until they obtain a NC teaching license. Teaching experience will be credited retroactively upon submittal of appropriate required documents to the licensure case manager. Other work experience and any teaching experience, which cannot be properly evaluated, will be paid retroactively once the license indicating years of experience is received. Experience credit is granted in the year within which it is received by DPI (provided it is received by April 1 of the active school year of employment) and is not granted retroactively to a prior year(s).
- Employees with licensure deficiencies:
 - At the end of the school year (June 30), will not be issued a contract for the following year, and
 - Will be identified in the HR Information System with a licensure deficiency prefix. (See "Prefixes to Status Codes for Licensure Requirements").

The information in this section is based on current NC licensing requirements and may be subject to change at anytime based on specifications issued by DPI.

II. Summary of Types of Licensure

- **Lateral Entry or Vocational License** – Allows skilled individuals outside the public education system with relevant degrees and experience to enter the teaching profession.
- **Direct Licensure** – CMS and an Institute of Higher Learning collaborate to design and deliver course work meeting licensure requirements.
- **Provisional Temporary License** – Issued with the requirement that credit deficiencies for full licensure be satisfied at the rate of six semester hours of course work per year. Credits must be completed by June 30 and must conform to the conditions set by the SDPI Licensure Section to clear provisional status. Provisional licenses may not be issued to staff in Title I schools or for teachers of core academic subjects.
- **Standard Professional I License (SPI)** – Formerly an initial license. SPI requires completion of an approved teacher education program (in or out-of-state) and evidence of meeting NCLB highly qualified requirements as defined by North Carolina or originating state. Documentation of HQ status must be provided by the individual. The SPI license is converted to SPII after three years of teaching.

- **Standard Professional II License (SPII)** – Formerly a continuing license. Issued to individuals who have completed at least three years of teaching (at least one must be in NC), have met requirements of the SPI license in regards to observation and evaluation, are recommended by the LEA and complete one of the following: NC testing requirement, National Board certification, NC HOUSSE, or Verification of Ability to Impact Student Learning Form. The licenses are renewed every five years with fifteen renewal credits, including at least three reading credits for teachers in grades K-8.

III. Beginning Teacher Support Program (formerly Initial Licensure Program – ILP)

The Beginning Teacher Support Program (BTSP) is designed to offer the necessary support for an individual’s professional growth during the first three years of instructional employment.

- Professional school personnel holding positions requiring state licensure are required to participate in the BTSP. The Beginning Teacher Support Program is not required for administrative licensure or licensure in instructional support positions (i.e., media specialist, student services specialists, social workers, counselors, psychologists, speech pathologists and audiologists).
- Participation in the BTSP is required of employees with fewer than **three** years of appropriate public school experience in their area of licensure. This will always include employees with lateral entry or workforce development licensure. This may include employees with SPI licensure (see career status code).
- At the end of the third year of participation in the BTSP, teachers may be recommended to convert their SPI license to SPII, if they have met requirements in regards to observation and evaluation, are recommended by the LEA, and complete one of the following: NC testing requirements, NC HOUSSE, or Verification of Ability to Impact Student Learning Form.

A. Requirements

The requirements for individuals participating in the BTSP are based on State Board of Education and CMS Board policies.

- BTSP orientation prior to the beginning of year one
- Mentor assigned for three years (paid mentor year one and two)
- Limited preparations (strongly recommended)
- Assignment in area of licensure
- No extra curricular activities unless requested in writing by the beginning teacher
- Limited exceptional or difficult students
- Individual Growth Plan (annually)
- Limited non-instructional duties and
- Use of the NC Performance Appraisal System
Four observations: 3 by principal or designee and 1 by a teacher (peer observation) annually

B. Mentor Designation and Responsibilities

- The supervisor of each beginning teacher completes the forms that identify the mentor and describe the support plan to be used by the mentor. These forms are submitted to the BTSP Coordinator in the Human Resources Department by November 20 and become part of the BTSP official documentation.
- Mentors for first-year and second-year, newly licensed, and first-year and second-year, lateral entry classroom teachers without previous teaching experience will receive a stipend payment to be determined by the district, based on available funding. [The mentors for third year, beginning teachers are unpaid, but should be assigned]. The State also provides a paid mentor for first year entry level instructional support personnel who have not previously been teachers and do not have experience in their field within a school setting (i.e., media specialists, speech pathologists, SSSs, counselors, and psychologists). A pilot project provides full-time mentors on a 1:15 ratio in a few CMS schools.
Note: Mentors must complete 24 hours of mentor training prior to serving as a mentor. The training must have taken place as of June, 2004.
- The mentor should be a career status teacher **or** possess at least three years teaching experience with good performance. A mentor in the same subject or grade level is recommended. **It is a State requirement that paid mentors participate in on-going annual professional development related to mentoring.**

IV. Lateral Entry Licensure

The purpose of lateral entry is to allow skilled individuals outside the public education system to enter the teaching profession. The following requirements must be met to acquire, maintain, and clear lateral entry licensure:

- Be selected for employment by a North Carolina school system;
- Hold a bachelor's degree from a regionally accredited college or university in the subject area (or related area) in which you are employed to teach **or** hold at least a bachelor's degree from a regionally accredited college **or** university and have satisfied PRAXIS II testing requirements for the license area; or have passing score on ACTFL (American Council for Teaching Foreign Languages)-only applies to World Languages, not English or hold a bachelor's degree from a regionally accredited college or university and have 24 semester hours of course work in the area;
- Have relevant prior professional work experience (optional); and
- Have a minimum cumulative GPA of at least 2.5 (not rounded), on a 4.0 scale, or have 5 years of experience considered relevant by the LEA, or have passed the PRAXIS I tests or total SAT score of 1100 or total ACT score of 24 plus have one of the following:
 - A GPA of 3.0 in the major field of study;
 - A GPA of 3.0 in all work completed in the senior year; or
 - A GPA of 3.0 on a minimum of 15 semester hours of course work completed within the last five years after the bachelor's degree or higher.

Options to meet lateral entry requirements:

1. Affiliate with a regionally accredited teacher education program in the specified teaching area. The university will outline course work required to be completed to meet licensure requirements. A minimum of six semester hours should be completed each school year. A maximum of three years is allowed to complete all required course work. (Some individuals who were issued a previous lateral entry license may have a longer total time period on the license). A passing score on the required PRAXIS II subject area test(s) must be attained during the first three school years, if the test was not the basis for qualifying for the license. Once all requirements are met, the education department from the university will make a recommendation for a clear license.
2. A teacher may elect to have an evaluation completed by the Regional Alternative Licensing Center (RALC) once they are employed as a lateral entry teacher. The RALC will outline the required course work to meet licensure requirements. This is an alternative to affiliating with one university's education program. If a teacher wishes to have an evaluation completed by the RALC, the teacher notifies the licensure case manager, who will be assigned based on the school assignment. The time periods for course work and test completion are the same for an RALC evaluation as the university evaluation, outlined in option 1.
3. Individuals who possess five or more years of experience considered relevant by the LEA and satisfy PRAXIS II requirements for the licensure area within the first year of teaching shall be issued a Standard Professional I License upon
 - a. Completion of three specific NC TEACH modules or the equivalent through an approved teacher education program and
 - b. Completion of an instructional technology module through the LEA or community College or approved teacher education program and
 - c. Completion of one successful year of teaching.
4. If a teacher is issued a lateral entry license and is employed during the school year for less than six months, they will earn the full three years to complete all requirements beginning the following year after which they are employed.

Note: For a list of surrounding colleges and universities, please refer to the following page.

A. Reimbursement for Lateral Entry Course Work

For information regarding reimbursement of lateral entry course work in FOCUS schools, send an email to tuitionreimbursement@cms.k12.nc.us. Effective, June 30, 2009, tuition reimbursement for NON-FOCUS schools was discontinued, with the exception of individuals who began course work prior to June 30, 2009 and have continued employment for 2009-10 school year.

B. Colleges and Universities

<u>Community College</u>	<u>Contact Person</u>	<u>Contact Number</u>
Central Piedmont Community College	Dr. Linda Dunlap	(704) 330-6883
<u>Universities</u>		
Gardner-Webb University, Boiling Springs, 28017	Dr. Donna Simmons	(704) 406-4406
Johnson C. Smith University, Charlotte, 28216	Dr. Bessie Gage	(704) 378-1063
Pfeiffer University, Mishenheimer, 28109	Dr. Joyce P. Edwards	(704) 463-3150
Queens University, Charlotte, 28274	Dr. Patrice Petroff	(704) 337-2575
University of North Carolina at Charlotte, 28223	Sam Nixon	(704) 687-8811
University of South Carolina at Lancaster, SC 39720	Karen Faile	(803) 313-7070
Wingate University, Wingate, 28174	Dr. Jacqueline Jenkins	(704) 233-8128
Winthrop University, Rock Hill, SC 29733	Lisa Johnson	(803) 323-2102
<u>Private Liberal Arts College</u>		
Belmont Abbey College, Belmont, 28012	Pam Wilson	(704) 461-6700
Catawba College, Salisbury, 28144	Dr. James Stringfield	(704) 637-4461
Montreat College	Dr. Beth Brayboy	(828) 713-3630
Lenoir-Rhyne College, Hickory, 28036	Dr. Janet Painter	(828) 267-3423
Livingstone College, Salisbury, 28144	Dr. Henry Johnson	(704) 216-6195
Regional Alternative Licensing Center	Ms. Penny Powell	(704)792-2709

V. Direct Licensure

On a case-by-case basis, the Licensure Section evaluates individual records for the purpose of establishing eligibility for licensing without the involvement of an IHE or other authorized recommending parties. Use of the Direct Licensure process is restricted and must be approved by the DPI. In CMS, direct licensure is most often used in selected vocational areas where CMS and an Institute of Higher Learning have collaborated to offer necessary courses.

A. Conditions for Direct Licensure

Direct licensing is contingent upon the following:

- a) Action is taken when extenuating circumstances prohibit fair and equitable evaluation through the normal routes for earning a license.
- b) Employees earning a license through the direct process must comply with all current:
 - a. provisional regulations
 - b. BTSP requirements
 - c. testing requirements and
 - d. experience requirements for the areas of licensing sought
- c) Applicants must qualify for the lateral entry classification to be eligible for an initial license based on direct licensure.

B. How to Obtain Direct Licensure

The following options are available to employees who wish to use the direct licensure process:

- OPTION 1:
CMS and IHE's may collaborate to design and deliver course work and/or experiences to address provisions of licenses held by employees.
- OPTION 2:
CMS may develop and deliver training and evaluation process that assures the applicant has attained entry-level competencies in the area for which a license is sought.

CMS recommends the employee to the licensure section for full licensing after an individual has successfully completed all requirements.

VI. Out-of-Field Assignments

Teaching assignments outside a person's area of licensure, **“even for a single period a day, is considered to be out-of-field,”** (temporary out-of-field assignments for **one** year, one period a day, are no longer allowable). Provisional licensure is required for out-of-field assignments. Failure to hold proper licensure can result in loss of experience for pay purposes, require additional courses to satisfy requirements, or can delay obtaining the SPII.

When individuals are assigned or placed out-of-field within a school year, a licensure case manager in HR must be notified immediately in order to request provisional licensure. DPI determines the requirements necessary to clear the provisional area.

The beginning teacher **must be** placed in his or her clear area of licensure, as out-of-field placement could prevent the teacher from completing the requirements of the BTSP process.

Note: Please use appropriate NCWise course coding, when completing class scheduling.

Relative to No Child Left Behind regulations, the use of an out-of-field provisional license does not meet the definition of a “fully licensed” and “highly qualified teacher”. Provisional licenses may not be issued to staff in Title I schools or teachers of core academic subjects.

VII. Licensure Renewal/Standard Professional II License (SP II)

- Employees in instructional support positions (counselors, SSSs, psychologists, social workers and media specialists) are issued a SPI license for three years. However, the license can be converted to SPII after a successful year of employment and recommendation for re-employment.
- Standard Professional License II is valid for five years. It is the responsibility of the employee to obtain the correct renewal hours to maintain a valid license.
- Licensure renewal requires fifteen renewal credits in course work related to areas of licensure and/or professional responsibilities. Course work should correspond to the employees Individual Growth Plan (IGP). One renewal credit is awarded for each year of full-time employment completed during the five-year cycle.
- Teachers of grades kindergarten through twelve must complete three renewal credits in their academic subject areas, including strategies to teach those subjects, during each five-year renewal cycle. This subject area requirement applies to individual's renewing their licenses on or after July 1, 2009 (beginning with licenses that renew June 30, 2010). Teachers completing the National Board Certification process or the National Board Certification renewal process during their renewal cycle are not required to complete the three renewal credits in their subject area.

- Principals and Assistant Principals must earn at least five (5) renewal credits during each renewal cycle focused on the principal's role in teacher effectiveness, teacher evaluations, teacher support programs, teacher leadership, teacher empowerment, and teacher retention.
- Workshops offered by CMS are entered in MyPD upon completion. However, course evaluations must be completed before credit is issued.
- Individuals should consult with the school PD Contact for guidelines and procedures for Professional Development, and additional information regarding registration, course approval, etc.
- The new MyPD Inservice screen is the official documentation for renewal credit. It is the employee's responsibility to check the screen periodically for current renewal credits.

VIII. No Child Left Behind (NCLB)

The No Child Left Behind Act strives to have every student achieving at proficient levels, as defined by each State, by the 2013-2014 year. To achieve this goal, each school district was to ensure that all core* teachers in every school were highly qualified, as well as fully certified, by June 30, 2006. The law already applies to newly hired teachers in Title I schools. Teacher assistants in Title I schools and Pre-K sites only must meet specific requirements and newly hired teacher assistants in Title I schools must currently meet those requirements to be eligible for hire. The current NCLB regulations are due for re-authorization. Changes to legislation which may impact our licensed staff will be shared when re-authorization is complete.

* Core teacher as defined by NCLB

DOCUMENTING

AND

MANAGING

EMPLOYEE

PERFORMANCE

AND

BEHAVIOR

DOCUMENTING AND MANAGING EMPLOYEE PERFORMANCE AND BEHAVIOR

I. Files

A. Personnel Files

A personnel file is maintained on all CMS employees in the Human Resources Department.

- The following is a list of some of the types of information maintained in personnel files:
 - ⇒ Application
 - ⇒ Contracts for instructional personnel
 - ⇒ Annual evaluations (Observations and Mid-Year Evaluations beginning in 2007-08)
 - ⇒ Letters and appropriate forms regarding job changes (transfer, reassignment, promotion, demotion)
 - ⇒ Letters regarding salary changes
 - ⇒ Career status letter for instructional personnel
 - ⇒ Letters and memos regarding job performance
 - ⇒ Letters and memos of commendation
 - ⇒ Letters and appropriate forms regarding leaves or suspensions
 - ⇒ Personnel Action Forms (data entry forms for maintaining the Automated Personnel Information System – APIS for transactions processed prior to April, 2009)
 - ⇒ Resignation forms and letters
 - ⇒ Fax and Direct Deposit Forms (As of April, 2009)

- Documentation of the job performance of teachers shall be placed in a teacher's personnel file only after five days notice to the teacher. **Principals and supervisors are reminded that this written notification is required by Public School Law 115C-325(b) and should be placed in the body of the document.** *The notification should say something similar to;* “This is to inform you that a copy of this document, (or the attached), will be placed in your employee **personnel file after five (5) days, in accordance with NCGS Section 115C-325(b).**”

- Current employees, former employees, or a properly authorized agent may view their personnel file **by scheduling an appointment** with the Human Resources Department. Please call 980-344-0272, in advance to reserve your appointment time.

NOTE: All portfolios for school staff, who have resigned, should be forwarded to HRIS, courier #846, where they are maintained in the event the employee returns or moves to another NC system.

B. Supervisor Files

All supervisory personnel with responsibility for evaluating employees should create and maintain an updated employee folder for each employee under his/her supervision. These files may include notes, memos or other documents concerning the employee's job behavior and performance. This information should be organized and easily accessible to the supervisor. Also, it may be helpful to include attendance information in this file.

Documents in a supervisory file may be helpful to the supervisor during the process of evaluating an employee's performance. For example, a supervisor may choose to refer to information in these files when documenting and communicating with employees about their performance or behavior. In essence, a supervisor file is the supervisor's working file on the performance and job behavior of the employee.

At times, it may be necessary to forward information from this file to the employee's personnel file in the Human Resources Department. For example, if an employee is refusing to follow reasonable instructions from a supervisor, or an employee is continuing to perform poorly, the supervisor may collect documentation from this file concerning these problems and attach them to a memo to be included in the employee's personnel file, along with any written warnings or communications about the expectations for improvement. When this occurs, the memo to the employee should include the required statement from Section A above that all materials will be placed in the employee's personnel file after five days and the documentation should then be forwarded to the Employee Relations for review and filing in the personnel file.

For further guidance and assistance in determining the types of documents to be forwarded to Human Resources to be included in the employee's personnel file, please contact a designated Employee Relations representative at 980-343-6254.

Supervisor files should be maintained in a secured file cabinet in the supervisor's office. A supervisor may choose to share this information with the employee upon request; however, this file is the supervisor's work file.

This file may be kept in addition to other files such as teacher portfolios.

C. Confidentiality of Records

Employees are expected to comply with all laws and Board of Education policies and regulations regarding the confidentiality of student records, employee personnel files and other confidential documents and information regarding students, applicants, employees and other board matters. The failure to adhere to Board policy or regulation or applicable laws regarding confidentiality could subject the employee to disciplinary action, up to and including termination.

II. Managing Performance

A. Instructional and other Licensed Personnel

All employees are accountable for their job performance. The job performance of all instructional and other licensed employees should be evaluated.

All employees are subject to termination for inadequate performance.

When appropriate, supervisors may engage in counseling with employees as a means of correcting performance concerns.

For guidelines regarding the evaluation process of teachers and other licensed personnel, administrators should consult this Handbook, which focuses specifically on teachers and other licensed personnel.

Administrators should consult with their supervisor or HR Manager concerning the procedures to be followed in the evaluation process, if there are questions regarding this guide.

Instructional staff may be required to comply with action plans, in accordance with board policy, as a means of addressing inadequate performance. Whenever an administrator has questions about whether an action plan is appropriate, or whether other steps should be taken to address problems with performance, the administrator should consult with their supervisor or Human Resources.

B. Suggestions for Performance Management

The following suggestions may help administrators and supervisors in initiating, facilitating and managing employee performance:

- Consider the welfare of the students as the highest priority
- Take a constructive, positive approach towards evaluating employee performance
- Foster an atmosphere of mutual respect in the process
- Do not act arbitrarily, capriciously or in a discriminatory manner
- Accurately communicate and document performance matters
- Be clear in communicating the consequences of unacceptable performance
- Consult board policies and regulations applicable to the process
- Utilize the support and assistance available from your HR Manager.

III. Managing Behavior of All Employees

A. Standards of Conduct

Managing the behavior of employees usually involves dealing with specific acts of misconduct on the part of employees.

When dealing with acts of misconduct, it is important to determine whether there are specific written rules that have been violated by the employee.

For example, all employees are subject to the Board of Education Standards of Conduct policy which sets forth a non-exclusive list of standards governing the conduct of employees. A violation of any of these standards of conduct can result in discipline, up to and including termination.

A copy of the Standards of Conduct Policy is available online.

One of the Standards of Conduct provides that a violation of any written rules or procedures published by schools or supervisors which do not conflict with or violate Board policy, procedures, rules or regulations, shall be grounds for discipline, up to and including termination. Therefore, administrators and supervisors who publish written rules and expectations to their employees have the backing of Board policy when it comes time to enforce those rules.

Although misconduct is sometimes treated as a performance problem in the evaluation process, administrators and supervisors are advised to recognize that the management of behavior problems may require documentation and steps beyond the normal observation/evaluation process. This means that administrators and supervisors should sometimes be involved in documenting these problems when they occur rather than waiting for the normal evaluation to take place.

There is no formal discipline system mandated with respect to behavior problems. Rather, each problem needs to be addressed by the administrator or supervisor depending on the nature and severity of the problem. Where appropriate, counseling and warnings can be used. In other cases of misconduct, more immediate action may be required.

B. Suggestions for Managing Behavior Problems

In those instances where in the opinion of the administrator or supervisor the conduct of the employee does not warrant immediate termination, the following suggestions may help the administrator or supervisor in limiting further misconduct, or at the very least, assuring that if such conduct continues, there is appropriate documentation of the problem.

- Counsel with the employee regarding the unacceptable behavior in an objective and factual manner.
- Clearly communicate your expectation to the employee.
- Inform the employee of the consequences if the behavior is not corrected.
- Clarify and confirm the employee's understanding of the expectations.
- Document the concern to the employee.

- If documented, the documentation should summarize any previous discussions that took place, state the facts regarding the unacceptable behavior, review the expectations and communicate to the employee the consequences if the behavior is not corrected.
- If an employee's behavior does not improve after following these steps, consult with your supervisor, HR Manager or Employee Relations about the appropriate discipline.
- Gain support, approval and confirmation administratively regarding any termination or other serious disciplinary action.
- Document the actions taken in a clear, objective manner.

C. Suggestions for Motivating Employees

The following tips are suggested for motivating employees to perform and behave to expectations:

- Clearly communicate performance expectations and standards.
- Give clear and concise directions and instructions.
- Keep employees informed about school goals, plans and results.
- Work as a team to achieve results.
- Be fair when evaluating employees.
- Provide appropriate feedback and communication to employees.
- Provide a working environment conducive to productivity and improving performance.
- Empower employees to plan and meet their goals creatively.
- Give employees authority that corresponds with responsibilities.
- Listen to employees.
- Treat employees with respect.
- Be consistent.
- Provide positive feedback when appropriate.
- Be accessible to employees.
- Seek employee's feedback.
- Lead by example.

D. Communicating Information to Employees

It is important as an administrator or supervisor to ensure that any information which you desire to communicate to employees be communicated clearly and be available to employees. There are several ways to communicate information to employees, including:

- School Handbook - If the school has a school handbook, employees should receive a copy, and where appropriate, pertinent provisions should be reviewed with employees.
- Board Policies - Employees have access to all Board policies on the CMS Intranet (see <http://documents.cms.k12.nc.us/dsweb/HomePage> .
- Files - Maintain appropriate files regarding memos and other communications to staff for reference purposes.
- Meetings - Maintain staff attendance rosters for all mandatory school or departmental meetings and take minutes or notes of meetings to assist those who may miss certain meeting.

APPENDICES

FORMS

Evaluation Instruments For Instructional/Other Licensed Personnel Are Available Online

<http://documents.cms.k12.nc.us/dsweb/View/Collection-266>

Do not use the paper forms. Contact Amanda Shelton or Jan Richardson for questions.

Please note the Employment Recommendation for Non-Career Status Licensed Employees is now located at the bottom of the End-of-year Evaluation. No additional forms are required to reference continued employment.

IMPORTANT DATES TO REMEMBER 2009-2010

The following information provides due dates for submission of observations, evaluations, and other documents for licensed employees. Due dates for non-exempt (hourly) and exempt employee appraisals are included.

SEPTEMBER

September 30 Mentor Identification for Beginning Teachers and First Year Support Staff to the BTSP Coordinator in Human Resources.

OCTOBER

October 30 Memo distributed to principals, supervisors and department heads advising them of evaluation due dates and changes in the hourly appraisal form.

October 30 Memo distributed to hourly employees regarding upcoming evaluations in November and December.

NOVEMBER

November 20 Individual Growth Plans for Beginning Teachers completed (submit in April).

November 20 Mentor plans for Beginning Teachers due to BTSP Coordinator.

November 20 **First observation** for BTSP and employees using NCPAS due.

DECEMBER

December 8 Must be hired by this date for year to count towards Beginning Teacher Support Program, career status, and a year of experience for salary purposes.

December 16 All hourly appraisals are due to the appropriate Human Resources Manager. Forms are available on the Intranet.

December 18 Drafts of mid-year appraisals for all assistant principals are due to Area Superintendents for review.

December 18 Human Resources Managers identify to the Compensation Specialists those employees receiving “below standard” evaluations and therefore are ineligible for the January market rate pay increases.

JANUARY

January 20 Mid-year appraisals for all principals and assistant principals due for submission to Director of HR Special Programs, courier #835. (Below standard performers, submit mid-year and supporting documents).

FEBRUARY

February 5 **Second observation** for BTSP and employees using NCPAS due.

February 5 **Mid-year appraisals** due for employees *evaluated in "MyPAM."* (**Below standard performers, submit mid-year and supporting documents to Employee Relations**).

February 19 If hired at beginning of year, must be employed through this date for year to count towards Beginning Teacher Support Program, career status, and a year of experience for salary purposes (120 days).

MARCH

March 15 Memo is distributed to department managers and supervisors advising them to prepare and submit annual evaluations for exempt (non-licensed) employees.

March 26 **End-of-year evaluations** submitted for all principals and assistant principals being recommended for non-renewal along with supporting documents due to Director of HR Special Programs.

APRIL

April 23 Recommendation for/against Standard Professional II License due to BTSP Coordinator. (Form #4113.4).

April 23 **Third observation** for BTSP, employees using NCPAS and peer observations for all non-career status employees due.

April 23 **End-of-year evaluations** for all non-career status licensed employees, including employees who are interim, end-of-year, part-time or lateral entry *due in MyPAM.* (**Below standard performers, submit end-of-year and supporting documents to Employee Relations**).

April 23 Annual IGP for Beginning Teachers due to BTSP Coordinator.

April 27 Superintendent notifies principals and assistant principals not being recommended for contract renewal.

April 30 All exempt, non-licensed employee evaluations are due to the Human Resources Director of Special Projects

MAY

May 7 **End-of-year evaluations** due for all assistant principals submitted to Director of HR Special Programs.

May 15 Superintendent notifies non-career status licensed employees not being recommended for contract renewal.

May 21 **End-of-year evaluations** for **all** career status licensed ten-month employees and support staff *due in MyPAM.*”

JULY

July 15 **All end-of-year evaluations** for principals are due approximately two weeks following the release of ABC data and should be submitted to Director of HR Special Programs.

**OBSERVATIONS & EVALUATIONS WORKFLOW
2009-2010**

09-10 STATUS	OBSERVATION/EVALUATION REQUIREMENTS	DUE DATE	DUE TO WHOM/WHERE
Employees Hired after March 1 st NT01 NT10	Human Resources End-of-year Reference Form – based on at least one formal observation	End date of Employment	Human Resources Manager
Interim, end- of-year, part- time employees with less than six months, but Prior to March 1 NT01 NT10 FT00* PT00* RT00*	2 formal observations by an administrator: ⇒ 1 announced ⇒ 1 unannounced End-of-year (appropriate PAI) *Observations for experienced part-time & full-time <u>teachers</u> and retirees may be snapshots.	At least one observation completed within 30 days of employment April 23	Teacher and licensed support staff evaluations submitted through “MyPAM” Teacher and licensed support staff evaluations submitted through “MyPAM”
Interim, end- of-year, part- time employees with more than six months of employment IL01-IL06 FT00* PT00* RT00* and other status codes as listed on forthcoming pages	3 formal observations by an administrator: ⇒ 1 announced ⇒ 1 unannounced ⇒ 1 announced or unannounced Individual Growth Plan (IGP) End-of-year (appropriate PAI) *Observations for experienced part-time & full-time <u>teachers</u> and retirees may be snapshots.	At least one observation and IGP completed within 30 days of employment April 23	Teacher and licensed support staff evaluations submitted through “MyPAM” Teacher and licensed support staff evaluations submitted through “MyPAM”

**OBSERVATIONS & EVALUATIONS WORKFLOW
2009-2010**

09-10 STATUS	OBSERVATION/EVALUATION REQUIREMENTS	DUE DATE	DUE TO WHOM/WHERE
IL10 IL20 IL21 LL01 LL02 VL01 VL02	Mentor plan (outline of observations & contacts)	November 20	BTSP Coordinator
	Beginning Teachers Growth Plan (IGP)	April 23	BTSP Coordinator
	3 formal observations by an administrator: ⇒ 1 announced ⇒ 1 unannounced ⇒ 1 announced or unannounced	November 20 February 5 April 23	Teacher and licensed support staff observations and peer observations submitted through "MyPAM"
	1 Peer observation	April 23	
	Mid-Year (4117.00M)	February 5	Mid-year appraisals and end-of-year evaluations submitted through "MyPAM"
	End-of-year evaluation (appropriate PAI; refer to Appendices)	April 23	

IL30 IL31 IL32 LL03	Mentor plan (outline of observations & contacts)	November 20	BTSP Coordinator
	Beginning Teachers Growth Plan (IGP)	April 23	BTSP Coordinator
	3 formal observations by an administrator: ⇒ 1 announced ⇒ 1 unannounced ⇒ 1 announced or unannounced	November 20 February 5 April 23	Teacher and licensed support staff observations and peer observations submitted through "MyPAM"
	1 Peer observation	April 23	
	Mid-Year (4117.00M)	February 5	Mid-year appraisals and end-of-year evaluations submitted through "MyPAM"
	End-of-year evaluation (appropriate PAI; refer to Appendices)	April 23	
	Recommendation for SP II License	April 23	BTSP Coordinator

**OBSERVATIONS & EVALUATIONS WORKFLOW
2009-2010**

09-10 STATUS	OBSERVATION/EVALUATION REQUIREMENTS	DUE DATE	DUE TO WHOM/WHERE
PB10	3 formal observations by an administrator:		Teacher and licensed support staff observations and peer observations submitted through "MyPAM"
PL01	⇒ 1 announced	November 20	
PL02	⇒ 1 unannounced	February 5	
PL03	⇒ 1 announced or unannounced	April 23	
PL04	1 Peer observation	April 23	
PL05	Individual Growth Plan (IGP)	April 23	Keep on file at school
VL04	Mid-year (4117.00M)	February 5	Mid-year appraisals and end-of-year evaluations submitted through "MyPAM"
VL05			
V0000-VIF	End-of-year evaluation (appropriate PAI: refer to Appendices)	April 23	
V0410			
VE00			

**OBSERVATIONS & EVALUATIONS WORKFLOW
2009-2010**

09-10 STATUS	OBSERVATION/EVALUATION REQUIREMENTS	DUE DATE	DUE TO WHOM/WHERE
PB20 PB30	<u>NC Performance Appraisal (TPAI)</u>		
	3 formal observations by an administrator ⇒ 1 announced ⇒ 1 unannounced ⇒ 1 announced or unannounced	November 20 February 5 April 23	Teacher and licensed support staff observations and peer observations submitted through “MyPAM”
	1 Peer observation	April 23	
	<hr/> Individual Growth Plan (IGP)	April 23	Retain at school
	<hr/> Mid-Year (4117.00M)	February 5	Mid-year appraisals and end-of-year evaluations submitted through “MyPAM”
	End-of-year evaluation (appropriate PAI: refer to Appendices)	April 23	
	OR		
	<u>NC Performance Appraisal (Summative Cycle)</u>		
	3 formal observations by an administrator: ⇒ 1 full review (announced) ⇒ 1 snapshot (unannounced) ⇒ 1 snapshot (announced/unannounced)	November 20 February 5 April 23	Teacher and licensed support staff observations and peer observations submitted through “MyPAM”
	1 Peer observation	April 23	
	<hr/> Individual Growth Plan (IGP)	April 23	Retain at school
	<hr/> Mid-Year (4117.00M)	February 5	Mid-year appraisals and end-of-year evaluations submitted through “MyPAM”
Experienced Teacher Summative Form	April 23		

**OBSERVATIONS & EVALUATIONS WORKFLOW
2009-2010**

09-10 STATUS	OBSERVATION/EVALUATION REQUIREMENTS	DUE DATE	DUE TO WHOM/WHERE
PB40 and PB41 Eligible for career status	3 formal observations by an administrator: ⇒ 1 announced ⇒ 1 unannounced ⇒ 1 announced/unannounced 1 Peer observation <hr/> Individual Growth Plan (IGP) <hr/> Mid-Year (4117.00M) End-of-year evaluation (appropriate PAI: refer to Appendices)	November 20 February 5 April 23 April 23 <hr/> April 23 <hr/> April 23 April 23	Teacher and licensed support staff observations and peer observations submitted through “MyPAM” <hr/> Retain in school file <hr/> Mid-year appraisals and end-of-year evaluations submitted through “MyPAM”
CR	<u>NC Performance Appraisal (Summative Cycle)</u> 3 formal observations by an administrator: ⇒ 1 full review ⇒ 1 snapshot ⇒ 1 snapshot <hr/> Individual Growth Plan (IGP) <hr/> Mid-Year (4117.00M) Experienced Teacher Summative Form <p style="text-align: center;">OR</p> <u>NC Performance Appraisal (Formative Cycle)</u> 2 snapshots (1 announced/ 1 unannounced) <hr/> Individual Growth Plan (IGP) <hr/> Mid-Year (4117.00M) Experienced Teacher Formative Evaluation Form	Within 15 days of completion <hr/> May 21 <hr/> February 5 May 21 <hr/> Within 15 days of completion <hr/> May 21 <hr/> February 5 May 21	Teacher and licensed support staff observations submitted through “MyPAM” <hr/> Retain in school file <hr/> Mid-year appraisals and end-of-year evaluations submitted through”MyPAM” Teacher and licensed support staff observations submitted through “MyPAM” <hr/> Retain at school <hr/> Mid-year appraisals and end-of-year evaluations submitted through “MyPAM”

Key Human Resources Policies

This is a quick reference of key HR policies for administrators and supervisors that can be used when clarification or enforcement of Board of Education policies is necessary. This is not a comprehensive list. All Human Resources (Personnel) policies can be found online under CMS Policies & Regulations Manual –

http://nt5.scbbs.com/cgi-bin/om_isapi.dll?clientID=392882&infobase=charmeck.nfo&softpage=PL_Frame

CMS/NEPN Code	Policy/Link
EGA	Information and Electronic Communication Systems http://policy.microscribepub.com/cgi-bin/om_isapi.dll?clientID=309701214&depth=2&infobase=charmeck.nfo&record={5C5}&softpage=PL_frame
GB	Employment at Will http://policy.microscribepub.com/cgi-bin/om_isapi.dll?clientID=309701150&depth=2&infobase=charmeck.nfo&record={699}&softpage=PL_frame
GBA	Equal Opportunity http://policy.microscribepub.com/cgi-bin/om_isapi.dll?clientID=309701150&depth=2&infobase=charmeck.nfo&record={6A2}&softpage=PL_frame
GBAA	Harassment of Employees http://policy.microscribepub.com/cgi-bin/om_isapi.dll?clientID=309701150&depth=2&infobase=charmeck.nfo&record={6A9}&softpage=PL_frame
GBE	Criminal Background Checks http://policy.microscribepub.com/cgi-bin/om_isapi.dll?clientID=309701150&depth=2&infobase=charmeck.nfo&record={728}&softpage=PL_frame
GBEA	Conflicts of Interest http://policy.microscribepub.com/cgi-bin/om_isapi.dll?clientID=309701150&depth=2&infobase=charmeck.nfo&record={7A1}&softpage=PL_frame
GBEB	Standards of Conduct http://policy.microscribepub.com/cgi-bin/om_isapi.dll?clientID=309701150&depth=2&infobase=charmeck.nfo&record={7DA}&softpage=PL_frame
GBEBB	Harassment of Students by Employees http://policy.microscribepub.com/cgi-bin/om_isapi.dll?clientID=309701150&depth=2&infobase=charmeck.nfo&record={821}&softpage=PL_frame
GBEC	Alcohol and Illegal Drug Use: Applicants and Employees http://policy.microscribepub.com/cgi-bin/om_isapi.dll?clientID=309701150&depth=2&infobase=charmeck.nfo&record={851}&softpage=PL_frame
GBED	Smoking and Use of Tobacco Products by Employees http://policy.microscribepub.com/cgi-bin/om_isapi.dll?clientID=309701150&depth=2&infobase=charmeck.nfo&record={8AD}&softpage=PL_frame
GCMB	Attendance by Employees http://policy.microscribepub.com/cgi-bin/om_isapi.dll?clientID=309701150&depth=2&infobase=charmeck.nfo&record={D42}&softpage=PL_frame
GCR	Outside Employment http://policy.microscribepub.com/cgi-bin/om_isapi.dll?clientID=309701150&depth=2&infobase=charmeck.nfo&record={DDC}&softpage=PL_frame

HUMAN RESOURCES CONTACTS FOR ASSISTANCE AND INFORMATION

Name	Title	Responsibilities
Staffing, Licensure and Special Programs		
Teresa Shipman 980.343.0953	Executive Director of Staffing & Licensure	Support to Staffing & Licensure Department, HR Compliance Administration Instructional Evaluation Forms
To Be Determined 980.343.7403	Director of Staffing & Recruiting	Staffing and Recruiting for Instructional, Non-Instructional & Executive Employment
Muriel O'Leary 980.343.0953	Director of Licensure Administration	Licensure, Career Status Information
Toney Smith 980.343.6342	Coordinator of Beginning Teacher Support Program	Monitoring Beginning Teacher Support Program, Evaluation Process, Mentor Pay
Janelle Collins 980.343.6403	Director of HR Special Programs	Administrative & Other Exempt Appraisals
Consulting		
Michael Mathews 980.343.1607	Executive Director of HR Consulting Support	Learning Communities Support
Mekisha Bonner 980.344.0465	Human Resources Manager	Northeast Learning Community
Suzanne Carpino 980.344.0417	Human Resources Manager	East Learning Community
Michele Jean-Jumeau 980.344.0562	Human Resources Manager	South Learning Community
Mike Hudak 980.344.0366	Human Resources Manager	Central Learning Community
Cindy Jeffares 980.344.0616	Human Resources Manager	West Learning Community
Jackie Robinson 980.344.0516	Human Resources Manager	North Learning Community
Deidra Spears 980.343.6631	Human Resources Manager	Achievement Zone & Non-Instructional Employment
Greg Sweet 980.343.6641	Human Resources Manager	Non-Instructional Employment
Employee Relations		
Janet Hamilton 980.343.6254	Executive Director of Employee Relations	Discipline, Grievance Administration, Legal Compliance, Performance Management & Problem Resolution
John Brady 980.343.1211	Employee Relations Manager	North Learning Community & West Learning Community
Lilla Sexton 980.343.7435	Employee Relations Manager	Achievement Zone
Dosha Dacus 980.343.7129	Employee Relations Specialist	Central Learning Community, South Learning Community, Metro & Morgan Schools
Arlette Dolphin 980-343-6328	Employee Relations Specialist	Northeast Learning Community, East Learning Community & Alternative Ed.
Human Resources Information Systems (HRIS)		
Jan Richardson 980.344.0275	Director of Human Resources Information Systems	Technology/Mainframe Support, APIS, Lawson, Employee Records
loadmin@cms.k12.nc.us	"MyPAM" Helpdesk	Technical Support Assistance for "MyPAM"