

MINUTES

CTA CBLT

CTA Office

February 26, 2018

In Attendance

Maribel Aponte	CTA	Ian Gesundheit	District	Megan Oates	CTA
David Azzarito	District	Theresa Harter-Miles	District	Clay Phillips	CTA
LeighAnn Blackmore	District	Farrah Hawkins	CTA	Mary-Grace Surrena	CTA
David Cintron	CTA	Josh Katz	CTA	Michelle VanderLey	CTA
Doreen Concolino	District	Michael Marzano	CTA	Patricia Walker	District
Albert Davies	CTA	Emily McCann	FEA	Wendy Wing	CTA
Wendy Doromal	CTA	Clinton McCracken	CTA	Tom Winters	CTA
Jason Duke	District	Phyllis Mills	CTA	Stephanie Wyka	District
Bill Floyd	District				

Introductions and Announcements

CBLT

David Cintron will serve as Gatekeeper.

Guest Speaker, Emily McCann, Ph.D., Northern Regional Collective Bargaining and Advocacy Specialist for FEA

CTA

Dr. Emily McCann began her presentation by making a records request for:

The complete formula which Orange County Public Schools uses to determine student growth data for OCCTA bargaining unit members, with variables clearly labeled.

Dr. McCann then referenced the statutory authority for the request as well as two student learning growth models currently used by Polk and Escambia counties. Dr. McCann indicated CTA needed to see this formula and that the formula needed to become a discussion in Bargaining. The formula needs to be a part of the Contract going forward. (See Appendix A)

The District questioned Dr. McCann's presentation as it was represented to the District that Dr. McCann was to bring information and to share examples from across the state; not make demands regarding the bargaining of the student learning growth model.

CTA stated that Dr. McCann is a permanent member of the bargaining team. CTA indicated they want to get away from the state VAM model and make the district model as simple as possible. Dr. McCann stated the model should be teacher chosen and directed so it will be understood by teachers.

The District indicated this is a matter under discussion by the Evaluation Committee. Further, the District shared that they believe the model should be transparent and there is a belief that the District is hiding the model. This is not correct. The District also shared that had the request for a "guest speaker" indicated the direction of Dr.

McCann's presentation, the District would have asked Associate Superintendent for Research, Accountability and Grants Brandon McKelvey to attend today's meeting.

CTA stated that topics such as this should be discussed in full at the bargaining table and it appears to CTA that Dr. McKelvey is not allowed to make decisions. CTA stated that it is not fair to put Dr. McKelvey in the middle of the discussion when he has nothing to do with the language of the contract.

The District clarified that Dr. McKelvey is a resource and does not make decisions. The District asked CTA for the intent of bringing Dr. McCann to the meeting.

CTA responded that the Bargaining Team has to negotiate all aspects of the Evaluation System and that if we want to retain teachers, we need an evaluation system that is fair and transparent. CTA believes we can be a model for Florida and the Nation.

The District shared that we are not proposing staying with the state VAM model. We have a committee system outlined in the Contract; committees do not make decisions, they do the work on behalf of the CBLT and the CBLT makes the decisions.

Dr. McCann shared CTA has a right to see and understand the policy.

Review of Minutes from January 30, 2018

CBLT

The CBLT approved the minutes with minor corrections.

Updates from January 30, 2018

District/CTA

- Instructional Coaches
 - The District is gathering the data requested and will verify its accuracy and provide to CTA by the next meeting.
- Safety Issues at Apopka High
 - The District is working with District Police on this matter and will report to David Cintron our findings.
- Mentoring Supplements for School Psychologists and Social Workers
 - The District asked for the names of the mentors denied the supplement.
 - The District is reviewing the language for any necessary revisions to address school psychologists and social workers.
- Arts Supplement
 - The District asked for a list of those teachers denied the supplement.
 - The District will contact Scott Evans for more information.
- Peers Acting as Managers
 - CTA expressed concern some teachers have been acting in a managerial role and wishes to develop a definition that clarifies the role of instructional coaches.
 - CTA presented a proposal for inclusion in the Glossary for consideration by the District. CTA took the language from the job posting and believes it protects all parties from a possible violation of the Code of Ethics. (See Appendix B)
 - The District will review the proposal and report back at the next meeting.

Review of Committee Assignments

CBLT

The District shared a draft listing of all committees outlined in the Contract for review. Both CTA and District updated the list with additional committee members for several of the committees.

The District then reviewed the contract language addressing the purpose and manner in which the committees should function.

CTA indicated concerns regarding the internal processes, deadlines, minutes and are there any bylaws.

The District referred back to the current contract language previously reviewed. Further, the District clarified that the committees do not make decisions, they research issues sent to them by the CBLT and make recommendations based on that research. The CBLT makes all decisions. (See Appendix C)

Substitutes

CTA

CTA shared they receive complaints daily that classes are being divided during FSA and there is a process that is not being followed. CTA shared they believe there are not enough substitutes, they do not know if it is Kelly Educational Staffing (KES). Non-instructional staff can fill in. Schools are routinely dividing classes in non-emergency cases without filling vacancies with administrators, instructional personnel without classes (coaches, media specialists, etc.) or paraprofessionals, secretaries, clerks, etc.

The District asked for a list of schools.

CTA stated that it is prevalent throughout the district, four (4) teachers at the bargaining table raised their hands that this is occurring at their schools. CTA asked for clarification on the fill rate which Human Resources posted in the RBELC.

The District clarified the fill rate comes from KES based on the absences reported to KES and filled by substitutes provided by KES. The District also shared an example of a recent day where the fill rate fell below the target. On that day, 259 absences were not covered; however, of those 259 absences, 239 were requested either the day before or the morning of the absence. This makes it very difficult to find adequate numbers of substitutes when coverage is requested that late.

CTA clarified the concern is that, regardless of the numbers, the process for splitting/dividing classes is not being followed. CTA shared that KES substitutes complain about the rate of pay.

The District shared that vast improvement in coverage from before KES to today. Before KES, the coverage averaged 85 percent, today it is between 97 to 98 percent. The District shared the efforts to get senior interns set up as substitutes between graduation and starting in a position with the District.

The CBLT referred this issue to the HR Committee for research and recommendations.

iReady

CTA

CTA shared that this program is primarily used in elementary schools, specifically K-3 teachers. Teachers' instructional time suffers because of mandated iReady computer time during the school day. Teachers are concerned iReady will be used for the student growth portion of the evaluation as it is an adaptive test. CTA believes the focus on iReady is a little ridiculous. CTA receives complaints that iReady is used instead of teachers providing instruction. CTA also receives complaints from parents. CTA shared that by the time students get to testing they no longer care and do not do as well on the tests. Internet access also is an issue of concern. When a school loses access, students are told to complete iReady minutes at home. CTA shared that iReady is not aligned with classroom teaching. If we are going to use iReady it needs to match scope and sequence of instruction, which it does not. Schools post wall charts, that CTA refers to as "walls of shame", with teachers' names and usage showing how well teachers are achieving weekly goals. Executive Director Michelle VanderLey recently met with a principal regarding the wall charts. She shared her belief that using these walls is degrading, creates a hostile work environment, and is a violation of the code of ethics – it is not a best practice. CTA refers to these wall charts as a "Wall of Shame". CTA does not recognize iReady as a test that should be

used and that it does not help teachers. CTA restated its desire to choose tests for the student learning growth portion of the evaluation system.

The District requested time to research the use of iReady and will report out at the next meeting.

Student Discipline and School Safety

CTA

CTA shared once again that there is a concern regarding the lack of consequences and consistency when it comes to student discipline. The message sent to students seems to be that students can do whatever they want to do. There needs to be more conversation between CTA and the District regarding student discipline. This issue has been raised since September and teachers still have to hunt up referral forms even though the Contract requires schools provide teachers with the referral form. CTA indicated they will file a grievance for any teacher who does not receive the referral form or for any other violation.

CTA believes there is a total lack of support for teachers across the district, i.e. reducing the offense level from Level IV to Level II. They raised the question of whether or not student discipline is a part of the school or district grade. CTA also questioned our implementation of Restorative Justice. CTA reported that unnamed district staff stated Restorative Justice is a fake program. CTA also shared that schools are not permitted to suspend students without the approval of the area superintendent.

The District shared that much of what we deal with in the schools centers on mental health issues which impact all aspects of the community. With respect to suspension, we cannot suspend some students for more than 10 days which also impacts the student discipline program. The District will continue to remind principals that the referral form must be provided to teachers.

The District will research the student discipline process and report back at the next meeting.

Speech/Language Therapists

CTA

This is a continuation of the discussion from the January 30, 2018, bargaining meeting.

CTA inquired about the minutes' requirement for the provision of services. CTA requested the specific authority regarding the provision of services. CTA is requesting to see the document that states that make-up sessions are required.

CTA raised the issue of direct instruction versus the amount of minutes for services provided under the Individual Education Plan (IEP). The District will research this issue and report back at the next meeting.

The District indicated that they continue to work on the staffing levels and use of substitutes for SLT absences. They continue to review the proposed language from the January 30, 2018, bargaining meeting and will report back at the next meeting.

CTA raised the issue of direct instruction versus the amount of minutes for services provided under the Individual Education Plan (IEP).

The District will research the question of direct instruction versus services and report back at the next meeting.

Student Data Collection

CTA

CTA reported that teachers are asked to collect more and more data, questioning who needs the data and its purpose. An example included recording how many minutes students spend on a computer. Another example required every teacher to do data collection for every child – iReady math minutes, etc. – and report out at individual parent conferences. A third example required teachers to prepare common assessments, give data to a coach who put it on a spreadsheet, present data at PLC so the data could be presented to the principal who had to present the data for a district meeting.

Teachers are not hired as data collectors for other teachers or administrators. CTA raised the issue of common assessments, sometimes done weekly. CTA believes common assessments are a contract violation. Teachers should be able to conduct some form of pre- and post-assessment, as well as create their own assessments for their particular students. CTA shared there should be a districtwide policy on the difference between what teachers must give versus what teachers may choose to give. CTA believes administrators are over-eager. This negatively impacts teachers. CTA shared that principals give teachers “homework” and require reflections following District Professional Learning Community (DPLC) activities.

Teachers are told that principals need the data for meetings they attend at the district level. CTA would like a copy of the policy or internal documents requiring this.

The District shared that common assessments are used to help instruction. In some schools teachers may be required to conduct three (3) assessments during a grading period, just to see where students are in meeting standards.

CTA stated teachers know how to assess their students.

The District will research this issue and report back at the next meeting.

School Psychologists

District/CTA

CTA inquired as the awarding of teaching experience credit for school psychologists.

The District reported the completion of the process of evaluating prior teaching experience. For those school psychologists eligible for additional salary credit for teaching experience credit, the credit will appear on the Wednesday, February 28, 2018, paycheck retroactive to July 1, 2017. Compensation Services will send an email notification to those school psychologists receiving this additional salary credit Tuesday, February 27, 2018. Any questions regarding salary credit should be directed to Compensation Services.

CTA asked about a response to the work year proposal presented at the January 30, 2018, bargaining session.

The District does not yet have a response; however, the District would like to establish an Ad Hoc committee to review any outstanding contractual issues, including the work year proposal, which may not align with the role of school psychologists.

CTA then asked for clarification of what constitutes a 12 month calendar.

The District shared that those employees on a 12 month calendar earn two additional sick leave days per year, and work all workdays with the exception of the districtwide shutdown between Christmas and New Year’s.

The District presented information on the award of Best and Brightest bonuses. The District anticipates payment of the bonuses on the March 21, 2018, paycheck.

Bonus	Amount of Bonus	Number of Teachers Eligible
Teachers rated Effective	\$800	1923
Teachers rated Highly Effective	\$1200	9441
Teachers with a qualifying SAT/ACT score	\$6000	988

Teachers who are rated Highly Effective and receive a qualifying SAT/ACT score receive both bonuses for a total of \$7200.

CTA requested the number of teachers who qualified last year but did not qualify this year.

The District will provide this information to CTA.

Salary

CTA

CTA presented a comprehensive salary proposal. (See Appendix D) This proposal included cost of living information, recruitment and retention information, and their analysis of historical information on OCPS budgeting. The presentation also included sections detailing the value of teachers and comparisons with other professions. The presentation included a summary of findings from the survey of CTA members conducted by CTA in Fall 2017. CTA presented the following priorities:

- An 8% increase across the board in base rate of pay
 - An additional \$0, \$1, \$2, \$3 to comply with state merit pay laws
 - Starting salary of \$40,000
- An annual COLA tied to the Social Security Administration adjustment for fixed income individuals
 - Requires a School Board Policy change
- Adopt a 40 hour workweek for instructional personnel
 - Add 30 minutes per day to allow more time to complete required work and address the increased work that is required
 - Expansion of working hours would require negotiation of protected planning time, numbers of meetings, Wednesday schedule, and other aspects of dealing with the increased working hours
- Full adoption of the revised Supplement Handbook as presented by the Supplement Committee
 - Includes new language, reorganization of supplement area descriptions, additional positions, and the reorganization of tiers (none of which decreases supplement pay)
- Pay fees for certification, recertification, adding of additional certification areas, and Professional Development Certification Program (PDCP) (formerly Alternative Certification Program), a program for the training and certification of non-education majors
 - Requires three (3) years of employment for those in the PDCP program
- Grant advanced degree supplements to all teachers earning advanced degrees regardless of area of certification

- Apply Class Size guidelines to all classes, not just core classes, to comply with the spirit of the state constitutional amendment

The overriding theme of the presentation was that should the District adopt all of the priorities, the recruitment and retention would improve. CTA suggested the possibility of tying the salary proposal to a two year commitment in order to support teacher retention.

The District stated that we do need to be creative.

CTA stated it is time for the District to step up to the plate and take control from the state.

The District commended CTA for the excellent presentation indicating they have not seen anything from CTA with quite this much research. Based on the presentation, the District confirmed with CTA that all of the priorities are equal. The District shared that fiscal year 2018-19 is the last year of the one mil referendum. The District needs to go back and review the presentation to confirm the data included in the proposal. It was also shared that the Legislature is still in session and until the session ends, the District is uncertain regarding how much money is available for salary increases. Based on current analysis, there looks to be very little in increases coming from the state and most of the increases are in the form of categorical funds.

The District shared that the advanced degree supplement item must be set aside as there is a pending arbitration on that issue.

The CBLT agreed to forward the proposal to the Finance and Compensation Committee, made of equal numbers of CTA and District personnel, to begin the process of analyzing these proposals to determine the actual cost to implement. The committee will report back at the next meeting.

Insurance Update

District

Senior Director of Risk Management Beth Curran presented the latest report on the Employee Benefits Trust. The Trust is the funding mechanism for the self-funded employee health insurance program. The Trust Summary for the period October 1, 2016 – September 30, 2017, is as follows:

- Total Earned Revenue increased to \$199,505,785 (+0.66% compared to the prior plan period. Overall employee membership increased by 1,333.
- Total Expenses decreased to \$196,184,453 (-.10% compared to the prior plan period.
- The Trust experienced an overall gain of \$3,321,333.
- Overall medical costs increased by \$343,749 (+0.19% compared to the prior plan period). The increase was driven primarily by outpatient spend. This is a positive result as it shows that the members are getting more medical issues resolved prior to requiring a more expensive inpatient service.
- Outpatient facility costs had the largest increase of \$2,700,567 (+7.8% over the prior plan period).

Ms. Curran presented numerous graphs and charts illustrating the summary above. She also shared the impact of some pharmaceuticals as compared to number of members using the pharmaceutical. (See Appendix E)

CTA asked about stop-loss coverage and the use of medical marijuana.

The District does not purchase stop-loss coverage as it is not economically sound given the cost of premiums versus the cost of claims. This District reviews this optional coverage on a regular basis. With respect to medical marijuana, this is not covered under our plan as it is not FDA approved.

Pursuant to the Trust guidelines, the overall gain referenced above may only be used for wellness initiatives or health claims, not for premium reduction or refunds. As a result, the District will be implementing two initiatives. One initiative targets those at risk of developing Type II diabetes. The second initiative targets those individuals with either a Type I or Type II diabetes diagnosis. Both of the programs offer education and other services with the intent of reducing the medical costs associated with these diagnoses.

Finally, Ms. Curran shared there will be no plan changes or increases in premiums for the 2018-19 plan year. Open enrollment will begin in the near future.

Review Action Items

CBLT

The CBLT identified the following action items and parties responsible.

Action Item	Party(ies) Responsible
Copy of DOE report on targeted and STO schools	District
Arts Supplement – Check with Scott Evans regarding supplement information	District
Number of instructional coaches by school	District
Review Glossary proposal	District
Committees meet before next bargaining meeting	CBLT
Use and availability of Substitutes	HR Committee
Research use of iReady	District
Research Student Discipline and Restorative Justice	District
Staffing levels and use of Speech/Language Therapists	District
State vs. District required student data collection	District
School Psychologists Ad Hoc Committee	CBLT & Finance and Compensation Committee
Review salary proposal	Finance and Compensation Committee
Revise definition for 12-month employment	Compliance Committee

Next Meeting

CBLT

March 29, 2018, 8:30 AM to 4:00 PM, Orange Technical College, Mid-Florida Campus

Appendix A

Orange County Classroom Teachers' Association

Affiliated with FEA, NEA, AFT, AFL-CIO

Demand and Request for Documents, Records and Other Information

**Under Florida Statutes Chapters 119 and
447, Part II**

February 26, 2018

On behalf of the Association of Bay County Educators, Michelle Vanderley demands access to the following record sometime before March 10, 2018:

- The complete formula which Orange County Public Schools uses to determine student growth data for OCCTA bargaining unit members, with variables clearly labeled.

FAILURE TO COMPLY WITH THIS DEMAND AND REQUEST FOR DOCUMENTS, RECORDS, AND OTHER INFORMATION MAY RESULT IN A MISDEMEANOR OR PUNISHABLE AS PROVIDED IN FLORIDA STATUTES CHAPTERS 775.082, OR 775.083, AN UNFAIR LABOR PRACTICE IN VIOLATION OF FLORIDA STATUTE 447.501 AND VIOLATION OF THE GRIEVANCE PROCEDURE IN THE WALTON COUNTY EDUCATION ASSOCIATION COLLECTIVE BARGAINING AGREEMENT.

The Florida Education Association

(3) EVALUATION PROCEDURES AND CRITERIA.—Instructional personnel and school administrator performance evaluations must be based upon the performance of students assigned to their classrooms or schools, as provided in this section. Pursuant to this section, a school district's performance evaluation system is not limited to basing unsatisfactory performance of instructional personnel and school administrators solely upon student performance, but may include other criteria to evaluate instructional personnel and school administrators' performance, or any combination of student performance and other criteria. Evaluation procedures and criteria must comply with, but are not limited to, the following:

(a) A performance evaluation must be conducted for each employee at least once a year, except that a classroom teacher, as defined in s. 1012.01(2)(a), excluding substitute teachers, who is newly hired by the district school board must be observed and evaluated at least twice in the first year of teaching in the school district. The performance evaluation must be based upon sound educational principles and contemporary research in effective educational practices. The evaluation criteria must include:

1. Performance of students.—At least one-third of a performance evaluation must be based upon data and indicators of student performance, as determined by each school district. This portion of the evaluation must include growth or achievement data of the teacher's students or, for a school administrator, the students attending the school over the course of at least 3 years. If less than 3 years of data are available, the years for which data are available must be used. The proportion of growth or achievement data may be determined by instructional assignment.

2. Instructional practice.—For instructional personnel, at least one-third of the performance evaluation must be based upon instructional practice. Evaluation criteria used when annually observing classroom teachers, as defined in s. 1012.01(2)(a), excluding substitute teachers, must include indicators based upon each of the Florida Educator Accomplished Practices adopted by the State Board of Education. For instructional personnel who are not classroom teachers, evaluation criteria must be based upon indicators of the Florida Educator Accomplished Practices and may include specific job expectations related to student support.

3. Instructional leadership.—For school administrators, at least one-third of the performance evaluation must be based on instructional leadership. Evaluation criteria for instructional leadership must include indicators based upon each of the leadership standards adopted by the State Board of Education under s. 1012.986, including performance measures related to the effectiveness of classroom teachers in the school, the administrator's appropriate use of evaluation criteria and procedures, recruitment and retention of effective and highly effective classroom teachers, improvement in the percentage of instructional personnel evaluated at the highly effective or effective level, and other leadership practices that result in student learning growth. The system may include a means to give parents and instructional personnel an opportunity to provide input into the administrator's performance evaluation.

4. Other indicators of performance.—For instructional personnel and school administrators, the remainder of a performance evaluation may include, but is not limited to, professional and job responsibilities as recommended by the State Board of Education or identified by the district school board and, for instructional personnel, peer reviews, objectively reliable survey information from students and parents based on teaching practices that are consistently associated with higher student achievement, and other valid and reliable measures of instructional practice.

(b) All personnel must be fully informed of the criteria, data sources, methodologies, and procedures associated with the evaluation process before the evaluation takes place.

(c) The individual responsible for supervising the employee must evaluate the employee's performance. The evaluation system may provide for the evaluator to consider input from other personnel trained under subsection (2). The evaluator must submit a written report of the evaluation to the district school superintendent for the purpose of reviewing the employee's contract. The evaluator must submit the written report to the employee no later than 10 days after the evaluation takes place. The evaluator must discuss the written

(5) **ADDITIONAL NOTIFICATIONS.**—The district school superintendent shall annually notify the department of any instructional personnel or school administrators who receive two consecutive unsatisfactory evaluations. The district school superintendent shall also notify the department of any instructional personnel or school administrators who are given written notice by the district of intent to terminate or not renew their employment. The department shall conduct an investigation to determine whether action shall be taken against the certificateholder pursuant to s. 1012.795.

(6) **ANNUAL REVIEW OF AND REVISIONS TO THE SCHOOL DISTRICT EVALUATION SYSTEMS.**—The district school board shall establish a procedure for annually reviewing instructional personnel and school administrator evaluation systems to determine compliance with this section. All substantial revisions to an approved system must be reviewed and approved by the district school board before being used to evaluate instructional personnel or school administrators. Upon request by a school district, the department shall provide assistance in developing, improving, or reviewing an evaluation system.

(7) **MEASUREMENT OF STUDENT PERFORMANCE.**—

¹(a) The Commissioner of Education shall approve a formula to measure individual student learning growth on the statewide, standardized assessments in English Language Arts and mathematics administered under s. 1008.22. A third party, independent of the assessment developer, must analyze student learning growth data calculated using the formula and provide access to a data visualization tool that enables teachers to understand and evaluate the data and school administrators to improve instruction, evaluate programs, allocate resources, plan professional development, and communicate with stakeholders. The formula must take into consideration each student's prior academic performance. The formula must not set different expectations for student learning growth based upon a student's gender, race, ethnicity, or socioeconomic status. In the development of the formula, the commissioner shall consider other factors such as a student's attendance record, disability status, or status as an English language learner. The commissioner may select additional formulas to measure student performance as appropriate for the remainder of the statewide, standardized assessments included under s. 1008.22 and continue to select formulas as new assessments are implemented in the state system.

(b) Each school district may, but is not required to measure student learning growth using the formulas approved by the commissioner under paragraph (a).

¹(8) **RULEMAKING.**—The State Board of Education shall adopt rules pursuant to ss. 120.536(1) and 120.54 which establish uniform procedures and format for the submission, review, and approval of district evaluation systems and reporting requirements for the annual evaluation of instructional personnel and school administrators.

History.—s. 708, ch. 2002-387; s. 7, ch. 2004-255; s. 11, ch. 2004-295; s. 60, ch. 2006-74; s. 29, ch. 2008-108; s. 2, ch. 2011-1; s. 13, ch. 2014-23; s. 94, ch. 2014-39; s. 12, ch. 2015-6; s. 36, ch. 2017-116.

¹**Note.**—Section 17, ch. 2011-1, provides that “[c]hapter 2010-279, Laws of Florida, does not apply to any rulemaking required to administer this act.”

Polk

courses without a VAM score must establish an SAO by following the process outlined in the Evaluation Manual – Appendix F Student Achievement Objectives.

15.17-1 Training and supporting resources which provide consistency in the implementation of SAOs will be developed by a joint committee appointed by the Superintendent and the PEA President. The committee will use the framework from the Center for Assessment as a foundation. The committee will identify the process to prepare trainers and deliver comprehensive training to all participants using a variety of methods. Participants on the committee may vary depending on the specific assigned tasks. Training must be ready for presentation prior to the employees' first contract day and the schedule for delivering training must begin within the first ten (10) instructional days. The Superintendent and the PEA President shall establish a date and the participants for the initial meeting for this committee within ten (10) business days of the ratification of this contract.

15.17-2 An employee shall have a choice to engage in the SAO process. In school year 2017-2018 if the employee does not choose to establish an SAO, their student learning data will default to the data source listed in the Evaluation Manual–Appendix B – District Course Test Map for the course(s) to which they are assigned. Starting in the school year 2018-2019, an employee teaching non-VAM assessed courses must establish an SAO for the student learning data portion of their evaluation.

An employee establishing an SAO must complete the forms and follow the process in the Evaluation Manual - Appendix F. An employee may work collaboratively on their SAO with other employees but may not be required to do so. The completed SAO template must be initially submitted to the principal/administrator no later than the fifth (5th) student day following Data Day as established in the official Polk County Public School District Calendar.

15.17-3 All SAOs must be based upon core/main course, or instructional standards for the selected student group and must follow the SMART protocol (Specific, Measurable, Appropriate, Realistic, and Time Limited) as appropriate to the course, grade level or position/assignment of the employee.

15.17-4 Baseline student data must be established by the employee during the first nine (9) week period as established in the official Polk County Public School District Calendar. It may be based upon data collected at any time prior to the end of the first nine (9) week period as outlined in the approved SAO goal.

15.17-5 The principal/administrator shall review the SAO using the Rubric for Rating the Quality of Student Achievement Objectives in the Evaluation Manual– Appendix F (the Rubric) within ten (10) student days and provide feedback to the employee. Any SAO evaluated as Quality Needs Improvement or Insufficient Quality is not approved until changes are made to meet the requirements as outlined by the Rubric. Employees and principals/administrators are encouraged to collaborate in this process. If a dispute cannot be resolved, the employee may appeal their concern to the Regional Assistant Superintendent for resolution. To be implemented, the SAO must be approved no later than the end of the first nine (9) week period as established in the official Polk County Public School District Calendar.

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Both the employee and the principal/administrator shall sign and maintain a copy of the approved SAO goal.

15.17-6 If a principal/administrator does not respond within the timeline in 15.17-4 above, the submitted SAO shall be considered approved.

15.17-7 For the 2017-2018 school year only, any employee may abandon the SAO process without detriment at any time prior to approval as referenced in 15.17-5. The employee's Student Performance rating for the students will then default to the rating based upon student test data as determined in Evaluation Manual - Appendix B - District Course Test Map. Starting in school year 2018-2019, any Category A, state VAM assessed employee, may abandon the SAO process without detriment at any time prior to approval as referenced in 15.17-5. They will then revert to the state VAM for the student learning data for that year.

15.17-8 A mid-year meeting to review the SAO progress will be held during the first fifteen (15) student contact days of the second semester. This meeting is required for all Category I teachers and only necessary for Category II teachers if they wish to adjust the expected targets of the SAO. This meeting may occur for Category II classroom teachers along with the review of their Informal Observation and for Category I instructional employees at the time of their post-conference for their first Formal Observation. The instructional employee and the principal/administrator shall review using the mid-year Reflection Questions in the Evaluation Manual– Appendix F – Student Achievement Outcomes and make adjustments as needed to increase the likelihood of a positive goal outcome.

2017-2018 Teacher Evaluation Process – Student Performance

General Overview

For 2017-2018, 33% of each teacher’s evaluation score is based on the last three years (when available) of their students’ performance data.

A student performance score and rating (Table 1) is calculated for each teacher, based on the percentage of their students that made adequate gains/proficiency on the assessments their students participated in.

Table 1: Student Performance Scores and Ratings

Student Performance Score	Student Performance Rating
1	Unsatisfactory
2	Needs Improvement
3	Effective
4	Highly Effective

For each assessment group, a scale was created to convert the percentage that made adequate gains to a 1-4 student performance score. Some courses have specific end-of-course assessments (EOC’s) that were used to measure student performance, and others used data from comprehensive tests. The following assessment results were used, as appropriate, in student performance calculations for the current year:

- | | |
|--|---|
| <input type="checkbox"/> Access for ELL’s | <input type="checkbox"/> FSA ELA Grade 10 Reading Retake |
| <input type="checkbox"/> AP Exams | <input type="checkbox"/> FSAA |
| <input type="checkbox"/> Star 360 Grade K-1 Early Literacy | <input type="checkbox"/> FCAT2 Grades 5, 8 Science |
| <input type="checkbox"/> Star 360 Grade 2-3 Reading | <input type="checkbox"/> IB Exams |
| <input type="checkbox"/> Star 360 Grade 1-3 Math | <input type="checkbox"/> NGSSS EOC Biology 1 |
| <input type="checkbox"/> FSA EOC Algebra 1 | <input type="checkbox"/> NGSSS EOC Civics |
| <input type="checkbox"/> FSA EOC Geometry | <input type="checkbox"/> NGSSS EOC U.S. History |
| <input type="checkbox"/> FSA Grade 3-10 ELA | <input type="checkbox"/> Teacher made EOC’s (High School) |
| <input type="checkbox"/> FSA Grades 4-8 Math | <input type="checkbox"/> VPK Assessment |

Students with both Access for ELL’s results and Star 360 results will use the Access for ELL’s.

Stability Groups

Not all students count toward a teacher’s evaluation. A stability group is a collection of students BY COURSE that meet certain class enrollment and duration rules that will count in the student performance portion of a teacher’s evaluation. In general, **stability** is determined by the following rules:

- Full Year Courses: Students are scheduled with the teacher during Survey 2 and Survey 3.
- Semester 1 Courses: Students are scheduled with the teacher during Survey 2.
- Semester 2 Courses: Students are scheduled with the teacher during Survey 3.
- ½ Semester courses: All are included.

Certain courses where instruction is not provided are excluded from the process (e.g. research, study hall). Some exceptions may apply for LOA or extraordinary situations. Students not present in a course for a long period of time because of in-school suspension may also be excluded based on information received from the school data specialist. The stability groups are posted periodically during the year and at the end of year for

FSA ELA & Math (State VAM): FSA Reading Grades 4-10, Math Grades 4-8

The student performance scores were calculated using state defined learning gain calculations.

VPK Assessment:

Using statewide data from AP1 to AP3, formulas were for each section of the test (Print/Phon, Oral & Math) to calculate the target score for each student.

Calculating the Student Performance Score

Using the score targets, a percentage of students that meet or exceed the target is calculated for each teacher by assessment group. The teacher then earns points (1-4) for each assessment group based on that percentage. If the teacher has more than one assessment group score, a weighted average is calculated based on the number of student scores in each group.

The chart below shows the percentages required to earn 2 (Needs Improvement), 3 (Effective) or 4 points (Highly Effective) for each assessment group. The FSA required percentages were determined by analysis of data and agreement between EEA representatives and district personnel. The required percentages for the other assessment groups were determined by equating the same rank percentile distribution of teachers as the FSA. For example, suppose the FSA percentage required for Needs Improvement is 36, and represents a teacher rank percentile of 10. After ranking the teachers by their percentage of students that met or exceeded the targets for each of the other assessment groups, the percentage required to be in the Needs Improvement category for each assessment group is found by looking at the 10th percentile of teachers in each group. The other required percentages for scores of 3 (Effective) and 4 (Highly Effective) are set using the same method. The scales are updated each year to ensure a fair distribution. An assessment group includes all assessment types that share the same scale. Table 4 below shows the assessment groups and required percentages for 2017-2018:

Table 4: Assessment Group Required Percentages

Assessment Group	Percentage Required for 2 points (Needs Improvement)	Percentage Required for 3 points (Effective)	Percentage Required for 4 points (Highly Effective)
Access for ELL's			
AP			
Biology 1			
Civics			
Star 360			
FCAT Science			
FSAA			
Geometry			
IB			
Algebra 1			
FSA			
Teacher-made tests			
US History			
VPK			

*The max requirement for any group to be highly effective will be 90%.

Calculating the Overall Score and Rating

The overall score for each teacher is calculated by adding together 33% of the student performance score and 67% of the professional practices score (Table 8). From the overall score, the overall rating is assigned using the scale in Table 9.

Table 8: Example Total Evaluation Score

Year	Type	Points	Weight	Current Year Weighted Evaluation Score	Overall Total Rating
2017-2018	TOTAL DANIELSON	4.00	67.00%	2.68	
2017-2018	TOTAL STUDENT PERFORMANCE	2.22	33.00%	0.73	
2017-2018	TOTAL		100.00%	3.41	Effective

Table 9: Overall Rating Scale

Overall Score	Overall Rating
1.00-1.49	Unsatisfactory
1.50-2.49	Needs Improvement
2.50-3.49	Effective
3.50-4.00	Highly Effective

Appendix B

GLOSSARY OF TERMS

Instructional Coach

An employee in the instructional bargaining unit that conducts training, coaching, and mentoring across all content areas with research-based instructional practices that support and assist the teacher evaluation system. Specific information gathered by a coach shall be kept confidential and shall not be given to those in a managerial role for evaluative purposes or used to support decision in regards to an individual's job status.

OCCTA Proposal
February 26, 2018

Appendix C

**CTA CBLT Committees
2017-18**

Appeals	
Michael Marzano, Co-Chair	Stephanie Wyka, Co-Chair
Maribel Aponte	Bill Floyd
Wendy Wing	Gloria Fernandez
	Alex Heidelberg
	Myrlene Jackson-Kimble
	Kelly Paduano
Budget (Joint Committee)	
Wendy Doromal	
Phyllis Mills	
Calendar	
Wendy Wing	
Tom Winter	
CTE (Ad Hoc)	
Megan Oates, Co-Chair	Alex Heidelberg, Co-Chair
Stephen Bowman	Crystal Davidson
Colton Nessmith	Capildeo Jadonath
Rosa Rivers	Andrew Jenkins
Compliance	
Josh Katz, Co-Chair	TBD, Co-Chair
Wendy Wing	
Evaluation	
Maribel Aponte, Co-Chair	Stephanie Wyka, Co-Chair
Michael Marzano	Bill Floyd
Wendy Doromal	Gloria Fernandez
Mary-Grace Surrena	Alex Heidelberg
	Myrlene Jackson-Kimble
	Kelly Paduano
Finance and Compensation	
Michelle Vanderley, Co-Chair	Theresa Harter-Miles, Co-Chair
Wendy Doromal	Jason Duke
Josh Katz	Doreen Concolino
Fringe Benefits (Joint Committee)	
Phyllis Mills	
Megan Oates	
Mary-Grace Surrena	
Grants	
Farrah Hawkins	
Clinton McCracken	
Human Resources	
Albert Davies, Co-Chair	David Azzarito, Co-Chair
Clay Phillips	Stephanie Heron

Safety (Joint Committee)	
David Cintron	
Megan Oates	
Betsy Reitzel	
Supplements (Ad Hoc)	
Clay Phillips, Co-Chair	Jason Duke, Co-Chair
Clinton McCracken	Lisa Downey
Rick Colgan	Theresa Harter-Miles
Christina Farley	

Appendix D



We are the Only Profession that
Creates All Other Professions

Are we valued as such?

OCCTA SALARY PROPOSAL-FEB 2018



Outline

Outline of our Justifications

- ◇ Cost of living
- ◇ Recruitment and retention
- ◇ OCPS Budgeting
- ◇ Working Conditions

We at OCCTA proposed a number of solutions that can be negotiated with the district. These included the following:

- ◇ Base rate of pay
- ◇ COLA (Cost of Living- policy change)
- ◇ Working hours changes
- ◇ Adoption of the Supplement Handbook
- ◇ Advanced Degrees Supplements
- ◇ Certification / Alt Certification reimbursement and incentives
- ◇ Additional instructional positions

Cost of Living in Orlando

- ◆ It is no secret that the cost of living in the Orlando area is rising, but do you know how much? Can your average OCPS teacher even afford it?

Cost of Living Comparison

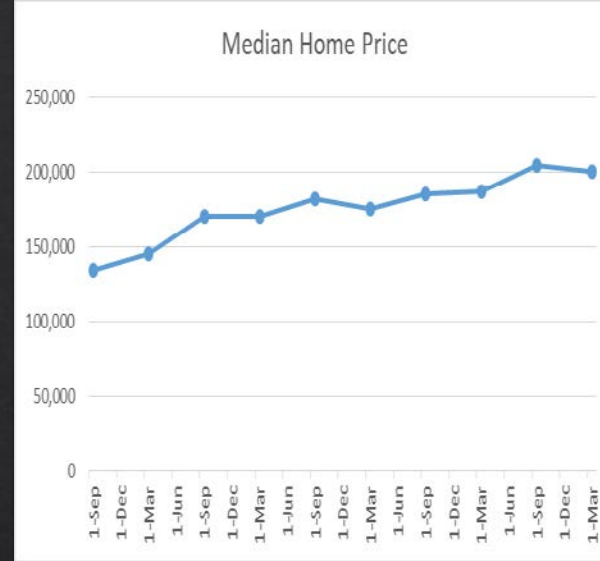
- ◆ The cost of living index for Orlando is 94.5 compared to the US standard of 100. (Orlando Economic Partnership 10/2017)
- ◆ The cost of living Index for Tampa is 91.7 compared to the US standard of 100. (Orlando Economic Partnership 10/2017)
- ◆ The cost of living Index for Groceries in Orlando is 102.7 compared to the US standard of 100. (Orlando Economic Partnership 10/2017)
- ◆ Keep in mind the US standard of 100 includes NYC and San Francisco... so Orlando is starting to get expensive compared to its cost in the past.
- ◆ The actual cost of living for a four person family in Orlando is \$3,151.48 monthly before even paying rent. (Numbeo.com)

Housing

- ◆ Orlando market trends indicate an increase of \$15,000 (7%) in median home sales over the past year. The average price per square foot for this same period rose to \$132, up from \$121. (Trulia.com 1/18)
- ◆ The midpoint price for a house that sold last month in Orange, Seminole, Osceola and Lake counties was \$238,000, and that was up 10.7 percent from a year earlier, according to a new report by Florida Realtors. (Orlando Sentinel 4/17)
- ◆ Orlando's trend of rising rental costs contrasted with South Florida, where rents declined 0.6 percent to a median of \$1,849 during the year-long period that ended in March. (Orlando Sentinel 4/17)
- ◆ Annual contract teachers have complained that some loan applications are denied on the basis that the teacher is considered a seasonal employee.

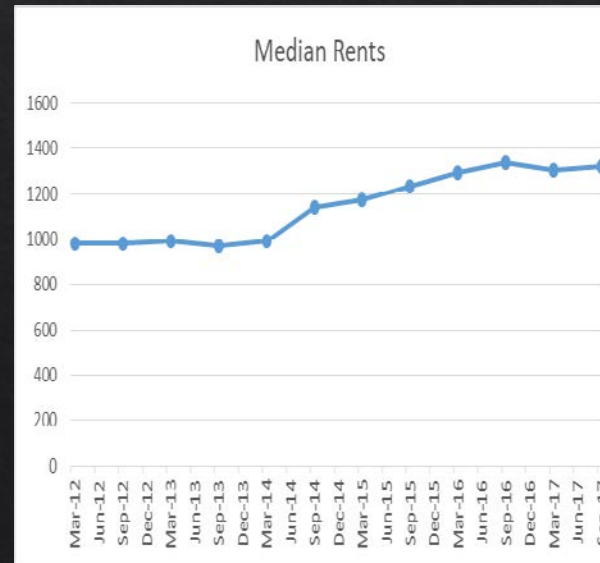
Trends

	Median Home Price
12-Sep	134,612
13-Mar	145,000
13-Sep	170,000
14-Mar	169,900
14-Sep	182,000
15-Mar	175,280
15-Sep	185,000
16-Mar	186,750
16-Sep	204,000
17-Mar	200,000



Trulia.com

	Median Rents
Mar-12	981
Sep-12	983
Mar-13	994
Sep-13	968
Mar-14	994
Sep-14	1,139
Mar-15	1,175
Sep-15	1,234
Mar-16	1,295
Sep-16	1,338
Mar-17	1,303
Sep-17	1,320



RentJungle.com

Can a Teacher Afford it?

- ◆ The starting pay for a 1st year teacher at OCPS is \$39,500 or for a 12 month period \$3,291 per month (OCPS pocket guide)
- ◆ The average pay of a teacher at OCPS is \$48,245 or for a 12 month period \$4,020 per month (OCPS pocket guide)
- ◆ The number of annual contract teachers is 5963.
- ◆ The number of continual contract teachers is 5789.

Recruitment and Retention

- ◆ It has become harder to recruit new teachers to the profession.
- ◆ Retention is recruitment! Having less teachers leave their jobs means we will not have to recruit increasing numbers of replacements.
- ◆ Salary Compression at the top end of the salary scale is a disincentive toward encouraging longevity.
- ◆ OCPS currently lists 14,213 instructional personnel. (OCPS Pocket Guide)
- ◆ An attrition rate of 2.3% as of 11/30/17 means OCPS has had to replace 326 so far this year. We could plausibly project that number to rise to almost 1,000 teachers by the end of the year (not including those who will retire or leave at the end of the year).
- ◆ Superintendent Jenkins reported that the most recent turnover rate was at 10% attrition this year (school board meeting 2/13/18).... That means 1,400 teachers

Attrition Rates OCPS

- ❖ Industries with the lowest separation rates typically fall into government positions. The nationwide average is 1.4% for State and local education government positions. (the Society for Human Resource Management – July 2017)
- ❖ OCPS suffers from attrition rates that are higher than the national and state averages for government employees ... this includes teachers (self reported by Superintendent Jenkins-school board meeting 2/13/18)
- ❖ CTA survey reports that workload, job satisfaction, and lack of pay are major contributors to this attrition rate.

OCPS
provided
numbers

Attrition									
SHRM Attrition Industry Average for State/Local Education Government Positions: 1.4%									
OCPS Attrition as of 11/30: 2.3%									
Elementary Attrition: 2.2%									
Middle Attrition: 2.9%									
High Attrition: 2.7%									
Reasons for Leaving									
Personal/Other Work: 70%									
Retirement: 11%									
Health: 7%									
Leaving within Learning Communities									
Southeast	10.20%								
North	10.80%								
West	11.50%								
East	12.90%								
Southwest	14.20%								
High School	23.40%								

Elementary Teachers
17- 5756
18-5787
Middle Teachers
17- 2179
18- 2259
High Teachers
17- 2594
18- 2618

Conclusion

- ❖ OCPS will continue to have trouble recruiting teachers because candidates can not afford to teach in the Orlando area.
- ❖ OCPS will continue to have trouble retaining experienced teachers as they opt for positions/situations that allow them to maintain an acceptable quality of life.
- ❖ Increased workload along with disappointment with salary prospects further exacerbates the problem of finding and retaining qualified candidates and teachers.
- ❖ The outlook is grim. The UCF College of Education current enrollment is 3,716 and enrollment is decreasing across the country. (UCF)
- ❖ If OCPS hopes compete for these graduates. They must do that by changing working conditions and salary.

Budgeting OCPS

- ❖ OCPS has consistently over budgeted expenditures that has led to multimillion dollar reserves that exceed the state recommended amounts.
- ❖ OCPS budgeted instructional salary changed little since the 2012-2013 school year (1.095 billion). In fact, it has decreased in 2017-2018 (1.089 billion). Has OCPS truly shown their priorities in regards to teacher salaries?
- ❖ While budgeting billion dollar salary expenditures, actual expenditures are far below expected. Where does that money go? Reserves? Why are teachers not receiving it?

OCPS Budget (12/13sy- 17/18sy)

<u>FY</u>	<u>Total Expenses</u>	<u>Growth</u>	<u>5 Year Growth</u>
2012-2013	\$1,564,460,293.00		9.25%
2013-2014	\$1,542,496,122.00	-1.40%	
2014-2015	\$1,545,698,029.00	0.21%	
2015-2016	\$1,604,429,673.00	3.80%	
2016-2017	\$1,637,259,268.00	2.05%	
2017-2018	\$1,709,249,918.00	4.40%	

OCPS Budgeted Reserves (12/13sy- 17/18sy)

<u>FY</u>	<u>Budgeted Reserves</u>	<u>Actual Reserves to Begin next FY</u>	<u>Difference</u>
2012-2013	\$38,354,623.00	\$380,230,351.00	\$341,875,728.00
2013-2014	\$224,157,534.00	\$394,832,388.00	\$170,674,854.00
2014-2015	\$307,570,803.00	\$368,682,851.00	\$61,112,048.00
2015-2016	\$318,514,555.00	\$407,387,068.00	\$88,872,513.00
2016-2017	\$376,663,976.00	\$412,908,224.00	\$36,244,248.00
2017-2018	\$365,755,832.00		

“Our No. 1 priority is teacher pay, and we all believe fervently that our teachers are underpaid”

-Bill Sublette (School Board Chair)

<https://www.orangeobserver.com/article/ocps-teachers-community-activists-rally-for-better-work-conditions>

OCPS Instructional Budget (12/13sy- 17/18sy)

<u>FY</u>	<u>Instructional Budget</u>	<u>%Budgeted Expenses</u>	<u>5 Year Growth</u>
2012-2013	\$1,095,000,000.00	69.99	-0.55%
2013-2014	\$1,016,000,000.00	65.87	
2014-2015	\$999,000,000.00	64.63	
2015-2016	\$1,035,000,000.00	64.51	
2016-2017	\$1,071,000,000.00	65.41	
2017-2018	\$1,089,000,000.00	63.71	
<u>FY</u>	<u>Instructional Salaries (part of the Instructional Budget)</u>	<u>%Instructional Budget</u>	<u>%Budgeted Expenses</u>
2012-2013	\$534,000,000.00	48.77	34.13
2013-2014	\$563,000,000.00	55.41	36.50
2014-2015	\$574,000,000.00	57.46	37.14
2015-2016	\$602,000,000.00	58.16	37.52
2016-2017	\$628,000,000.00	58.64	38.36
2017-2018	\$643,000,000.00	59.04	37.62

OCPS Admin Budget (12/13sy- 17/18sy)

<u>FY</u>	<u>School Admin Total</u>	<u>%Budgeted Expenses</u>	<u>5 Year Growth</u>
2012-2013	\$89,600,000.00	5.73	34.71%
2013-2014	\$108,000,000.00	7.00	
2014-2015	\$102,400,000.00	6.62	
2015-2016	\$106,600,000.00	6.64	
2016-2017	\$109,000,000.00	6.66	
2017-2018	\$120,700,000.00	7.06	
<u>FY</u>	<u>District Admin</u>	<u>%Budgeted Expenses</u>	<u>5 Year Growth</u>
2012-2013	\$5,100,000.00	0.33	39.22%
2013-2014	\$6,000,000.00	0.39	
2014-2015	\$5,700,000.00	0.37	
2015-2016	\$6,600,000.00	0.41	
2016-2017	\$7,300,000.00	0.45	
2017-2018	\$7,100,000.00	0.42	

OCPS Training Budget (12/13sy- 17/18sy)

training, testing, and digital learning

<u>FY</u>	<u>Training Budget (Curriculum Development, Staff Training, Tech)</u>	<u>% Budgeted Expenses</u>	<u>5 Year Growth</u>
2012-2013	\$65,000,000.00	4.15	63.08%
2013-2014	\$80,000,000.00	5.19	
2014-2015	\$90,000,000.00	5.82	
2015-2016	\$100,000,000.00	6.23	
2016-2017	\$65,000,000.00	3.97	
2017-2018	\$106,000,000.00	6.20	

New/Additional Revenue?

- ◆ Per OCPS 2016-2017 Adopted Budget:
 - ◆ Total Budget is \$2,027,853,547 (2015-2016: \$1,921,686,177)
 - ◆ \$968,309,640 of revenue is from property taxes [based on 48.72% from local sources (Adopted Budget, pg. 14) and 98.01% of local sources from property taxes (Adopted Budget, pg. 18)]

- ◆ From Orange County Property Appraiser:
 - ◆ Taxable Values increased 8.42%
 - ◆ (\$109,414,202,284 [published 2016 Taxable Values] up from \$100,914,686,930 [published 2015 Taxable Values])
 - ◆ These reports are public records available on the Property Appraiser website and represent the value basis for the current property tax collections.

- ◆ At the current millage rate, this generates \$81,555,647 in additional revenue to OCPS this year, just from additional tax revenues on the increased property values.

- ◆ This \$81,555,647 is additional available revenue, equivalent to 13% of the current budget for Instructional Salaries (12.996%) and is independent of any state or federal budget allocations.

So What is OCCTA trying to say?

- ◆ Do you mean to tell me the amount of money available is increasing despite stagnant state budgeting? YES!
- ◆ So would that mean that OCPS would once again spend vastly less money on salaries than budgeted.... Even with increased revenue? YES!



Our Value

- ◆ We serve 207,253 students (OCPS Pocket Guide)
- ◆ Run 10 magnets programs that are recognized by Magnet Schools of America
- ◆ One of the top 10 school districts for digital education as recognized by National School Boards Association and the Center for Digital Education.
- ◆ Graduation rate of 92.2% and 113 Super Scholars accepted to top 20 Universities (US News and World Report)
- ◆ Broad Prize winner for excellence in urban education and a recognized A+ district.

Our Value

- You are thoughtful, highly organized and efficient.
- You understand the concept of constant improvement.
- You work well alone, and collaborate well with others.
- You have great management abilities and leadership skills.
- You have an excellent understanding of human behavior and a lot of experience interacting with people with different personalities.
- You are a great writer and effective communicator.
- You are flexible and willing to change.
- You have a strong work ethic.
- You are a lifelong learner, and that's not going to stop now that you're on the job market.

What could a teacher do?

- ◇ These are listed by reported starting pay

- ◇ Paralegal - \$50,550

- (May 2014 <https://www.paralegal411.org/careers/florida/>)

- ◇ Firefighter - \$40,0000 (Orange County Gov.)

- ◇ Park Program Administrator - \$62,000 (Orange County Gov.)

- ◇ Registered Nurse - \$43,300 (Orange County Gov.)

- ◇ Education Director - \$52,000 (Orange County Gov.)

Working Conditions

- ◆ Overwhelmingly teachers feel that working conditions have deteriorated at OCPS. The amount of mandated work, loss of autonomy, and dissatisfaction is increasing.
- ◆ An OCCTA work survey (2016-2017) had large numbers of teachers turning in work hour cards that showed them working over 20 hours more than their scheduled 37.5 hours per week.
- ◆ Another OCCTA work survey (2017-2018) reported that teachers responded as follows:
 - ◆ 70% strongly disagreed that they have enough planning time
 - ◆ 68% said they knew a teacher who resigned specifically because of the work load.
 - ◆ 63% said they would like an additional week of pre-plan just to get ready for the school year.
 - ◆ 54% said they are strongly considering leaving the profession because of workload and hours.
 - ◆ This is just a small sample of the results, but they are telling.
- ◆ Clearly this is becoming a problem that should concern OCPS, CTA, and the School Board.



The Proposal

- ◆ We at OCCTA will propose a number of solutions that can be negotiated with the district. These include the following:
 - ◆ Base rate of pay
 - ◆ COLA (Cost of Living- policy change)
 - ◆ Working hours changes
 - ◆ Adoption of the Supplement Handbook
 - ◆ Advanced Degrees Supplements
 - ◆ Certification / Alt Certification reimbursement and incentives
 - ◆ Additional instructional positions

Base Rate of Pay

- OCCTA proposes the following to be negotiated in conjunction with the additional proposals in this presentation.

	Base Pay Rate Increase	Merit Pay (based on evaluation)
Highly Effective	8%	3\$
Effective	8%	2\$
Needs Improvement	8%	1\$
Unsatisfactory	8%	0\$

- A 8% increase across the board raise in Base Rate of pay. This eliminates salary compression and eases the ability of teachers to keep up with the cost of living while compensating them for increased workloads. It would give the average teacher (\$48,245) a \$3,859 raise and a beginning teacher (\$39,500) a \$3,160 raise.
- An additional 0\$, 1\$, 2\$, or 3\$ to comply with state merit pay laws. This is compliant as Palm Beach County has already adopted a similar plan and has DOE approval. Tying teacher pay to evaluation has been a failure as acknowledged by Superintendent Jenkins. <http://ytcropper.com/cropped/RX5a8b01de7f6b3>
- OCCTA calculates this will cost an additional \$ 51 million in instructional pay and is acknowledged as a 2 year deal.
- Starting salary = \$40,000
- 16- 17 – OCPS had \$36 Million Dollars in additional unspent funds that went into reserves.
- 16- 17 – OCPS had \$412 million in actual reserves.

COLA

- ◇ The Cost Of Living has clearly increased over the last 10 years. We propose that the OCPS adopt a COLA that is tied to the SSA adjustment for fixed income individuals. SSA has added a 16.6% cost of living adjustment while teacher pay has only increased on average of 2.6%. This would have to be a School Board Policy change.
- ◇ According to the Social Security Administration the actual increases in Cost of Living Adjustments each year of the last 10 years totals 16.6%.
- ◇ Average teacher pay in Florida
 - ◇ 07-08 \$46,922
 - ◇ 14-15 \$48,179 * last year reported by DOE.
 - ◇ \$48,245 (OCPS)
 - ◇ An increase of \$1,241 or 2.6%
- ◇ Total Unweighted funds per student:
 - ◇ 07-08 - \$7,127
 - ◇ 17-18 - \$7,307
 - ◇ \$180 or 2.5% more than before the recession
- ◇ 16- 17 – OCPS had \$36 Million Dollars in additional unspent funds that went into reserves.
- ◇ 16- 17 – OCPS had \$412 million in actual reserves.

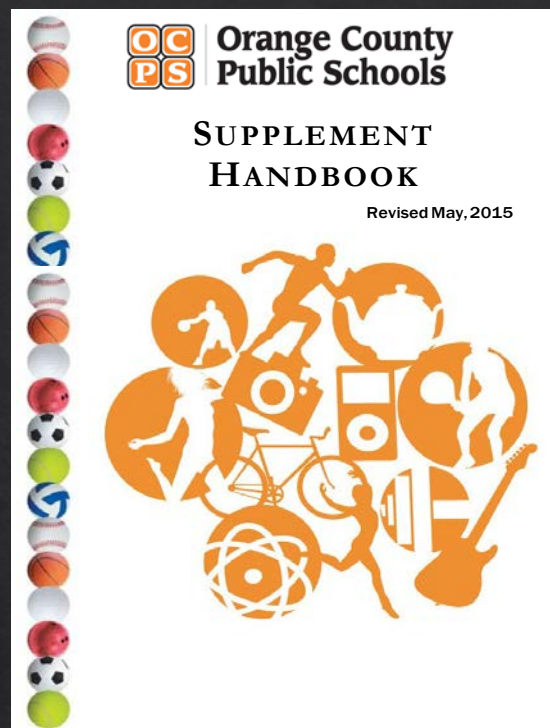


40 Hour Work Week



- ◇ OCCTA proposes to adopt the 40 hour work week for instructional personnel.
- ◇ This would add an additional 30 minutes to each work day. This would allow more time for teachers to complete required work and deal the increased work load that has been required of them. It recognizes the amount of work teachers already have. It allows additional time for the current meetings teachers attend, in-service trainings, and other additional duties that have been assigned.
- ◇ The composition of the work day: protected planning time, numbers of meetings, Wednesday schedule, and other aspects dealing with the expansion of working hours shall be negotiated and agreed upon before adopting the 40 hour work week.
- ◇ An OCCTA survey reports that 75% of teachers agree or strongly agree with the 40 hour work week.
- ◇ Compensation for this change can be included in the base rate of pay discussion.

Supplements



- ◆ The full adoption of the Revised Supplement Handbook as presented by the Supplement Committee (jointly worked on by OCCTA and OCPS).
- ◆ It includes new language, reorganization of supplement area descriptions, additional positions, and the reorganization of tiers (none of which decreases supplement pay).
- ◆ This project has been a 3 year effort and has found itself sitting on the table waiting for approval.
- ◆ OCCTA projects the cost of adoption at \$2.8 Million (Last number used at supplements meeting).

Certification Reimbursement



- ◆ The current fee to apply for and to renew a Florida teaching certification is \$75 with an additional \$75 fee per addition subject.
- ◆ Why do we ask our teachers to pay a fee to work for OCPS?
- ◆ We propose that as an incentive to retain teachers and to increase the diversity of their certification competencies, OCPS pay for recertification fees and the addition of certification areas. This should be done for teachers wishing to remain with OCPS and renew their teaching certificates.
- ◆ If just 20% of the workforce was renewing their certification it would only cost OCPS roughly \$280,000 A drop in the bucket for a multi-billion dollar budget and would be seen as a genuine investment in teacher retention.

Alternative Certification Reimbursement



- ◆ In an effort to recruit teachers OCPS many times finds itself hiring instructional personnel who originally were not trained as educators.
- ◆ These individuals are still required to use the alternative certification program. They can incur thousands of dollars in class fees (for example: 5 classes at \$250 a piece) just to work at OCPS. This is a disincentive to change careers and become a teacher.... Especially in light of a \$39,500 starting salary.
- ◆ Once again, why do we ask teachers who wish to work for OCPS to pay fees in order to do so?
- ◆ OCCTA proposes that after completing the certification process, any teacher who remains with OCPS for at least 3 full years shall have the full amount of their certification class fees reimbursed.

Advanced Degrees

- ❖ OCCTA proposes that we honor the experience and education of teachers who having chosen to earn advanced degrees to better themselves. This has positive effects in classroom and retains a highly skilled work force for OCPS.
- ❖ OCPS has interpreted the state law on advanced degrees more stringently than other school districts. This impedes on the ability of teachers with advanced degrees to obtain an Advanced degree supplement. Other counties, St. Johns and Hernando for example, honor advanced degrees earned by teachers and psychologists.
- ❖ CTA proposes eliminating the stringent approach to interpreting state law in regards to advanced degree supplements. We propose following a looser interpretation and awarding all those high skilled teachers with advanced degrees the supplement amounts according to the contract.

More Instructional Positions



- ◆ While we understand that there are budget concerns with increasing the size of the OCPS workforce, we also understand that increasing student loads in turn create increased work loads that teachers are increasingly finding harder to manage.
- ◆ The State class size amendment was intended to limit the number of students that a teacher works with as the electorate fully recognized that there are diminishing returns with increasing number of students per teacher.
- ◆ Attempts to circumvent this amendment have been as follows:
 - ◆ by defining the applicability to only core class while adding oversized class loads in electives.
 - ◆ adding more periods thus increasing student load regardless.
 - ◆ only counting class size during FTE counts.
- ◆ OCCTA would like to implore OCPS to increase the number of instructional personnel to fully comply with the spirit of the State Constitutional Amendment to limit all classes to sizes as stated in the Amendment.

Appendix E

Orange County Public Schools



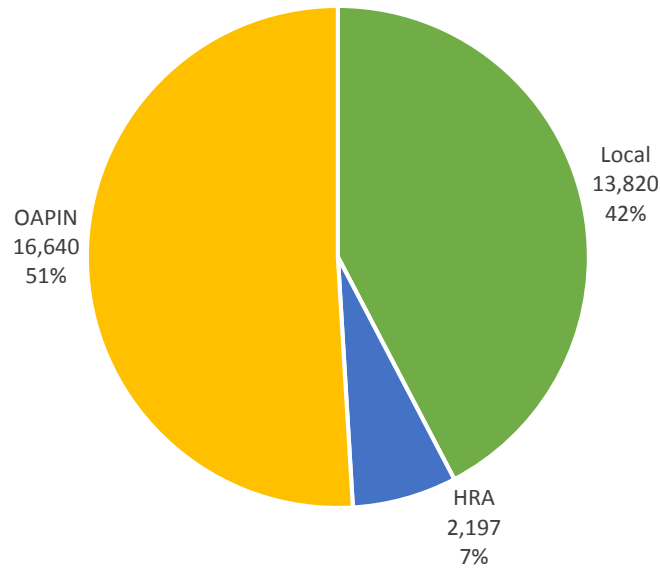
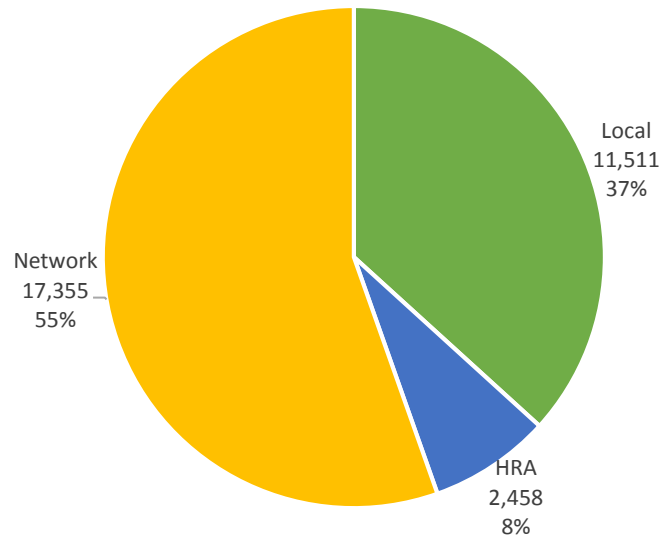
Employee Benefits Trust Trustee Meeting January 2018

TRUST SUMMARY:

- Total Earned Revenue increased to \$199,505,785 (+0.66% compared to the prior plan period). Overall employee membership increased by 1,333.
- Total Expenses decreased to \$196,184,453 (-0.10% compared to the prior plan period).
- The Trust experienced an overall gain of \$3,321,333.
- Overall Medical costs increased by \$343,749 (+0.19% compared to the prior plan period). The increase was driven primarily by outpatient spend. This is a positive result as it shows that the members are getting more medical issues resolved prior to requiring a more expensive inpatient service.
- Outpatient Facility costs had the largest increase of \$2,700,567 (+7.8% over the prior plan period).

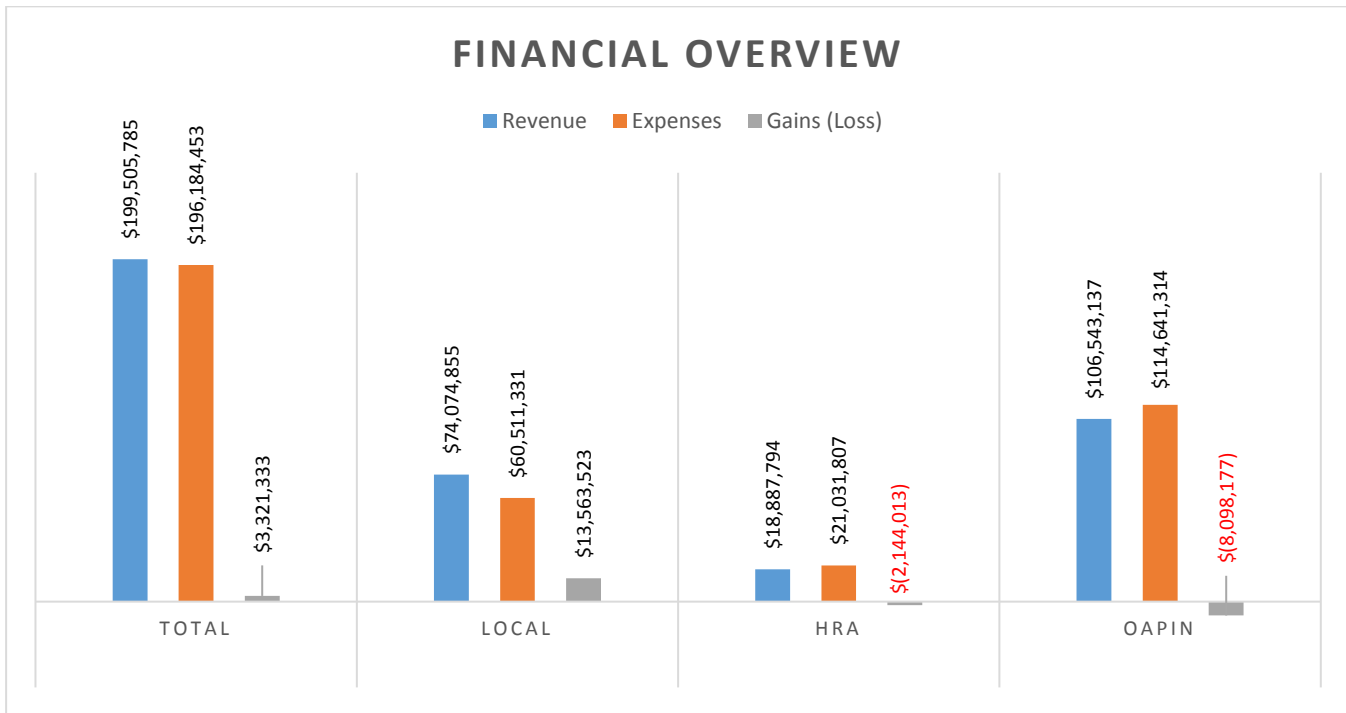
Membership Changes

October 2015 – September 2016 compared to October 2016 – September 2017 - Overall employee membership increased by 1,333 (+4.3%). The family size has increased slightly to 1.60 from 1.57 in the prior year.

2016 - 2017 MEMBERSHIP BY PLAN**2015 - 2016 MEMBERSHIP BY PLAN**

Employee Benefits Trust

Reporting Timeframe – October 2016 – September 2017



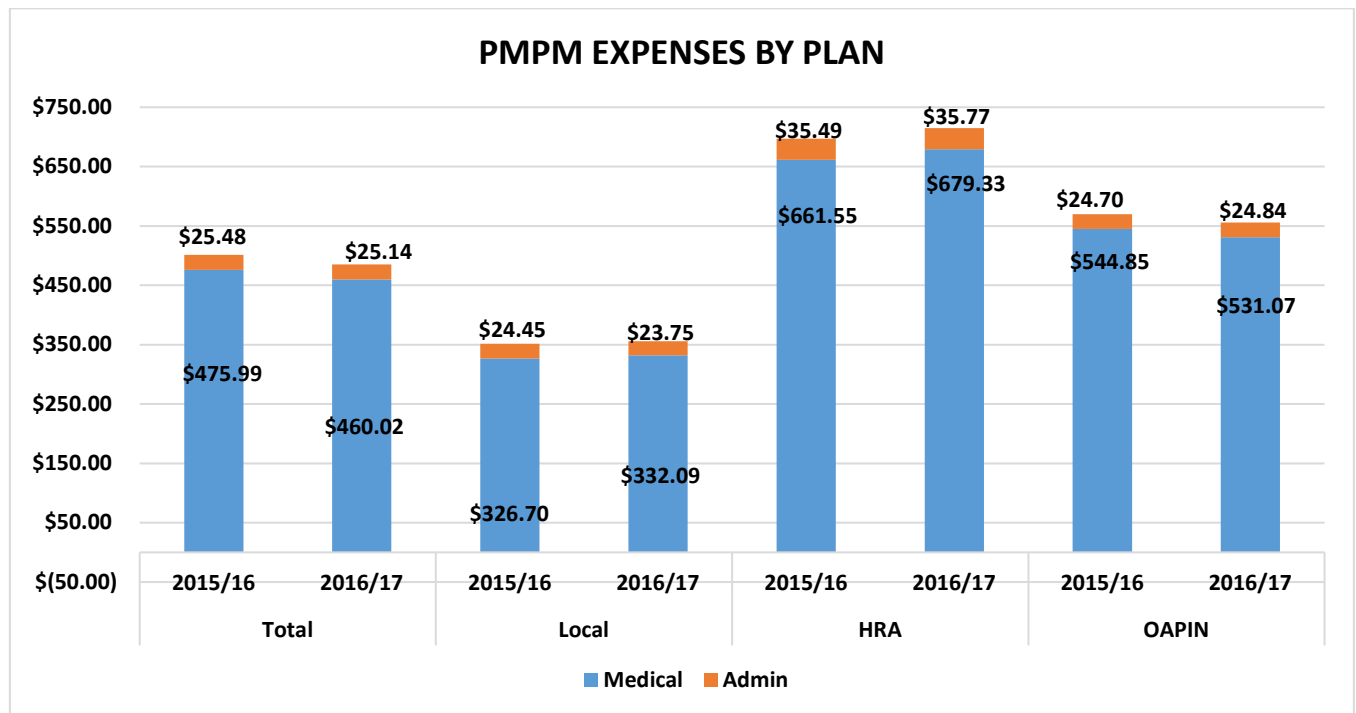
	All Plans	PMPM
Average Membership	32,657	
Revenue	\$199,505,785	\$493.37
Medical Expenses	\$186,018,408	\$460.02
Admin Expenses	\$10,166,045	\$25.14
Total Expenses	\$196,184,453	\$485.16
Gain/(Loss)	\$3,321,333	\$8.21
% Gain/ (Loss)	1.7%	

	Local Plus	PMPM	HRA*	PMPM	OAPIN	PMPM
Average Membership	13,820 (42%)		2,197 (7%)		16,640 (51%)	
Revenue	\$74,074,855	\$435.61	\$18,887,794	\$672.24	\$106,543,137	\$516.63
Medical Expenses	\$56,472,034	\$332.09	\$19,087,238	\$679.33	\$109,519,681	\$531.07
Admin Expenses	\$4,039,297	\$23.75	\$1,005,115	\$35.77	\$5,121,633	\$24.84
Total Expenses	\$60,511,331	\$355.84	\$20,092,353	\$715.11	\$114,641,314	\$555.90
Gain/(Loss)	\$13,563,523	\$79.76	\$(1,204,559)	\$(42.87)	\$(8,098,177)	\$(39.27)
% Gain/ (Loss)	18.3%		(6.4%)		(7.6%)	

* Excludes HRA Contribution (\$750 per employee per year)

Employee Benefits Trust

Reporting Timeframe – October 2016 – September 2017



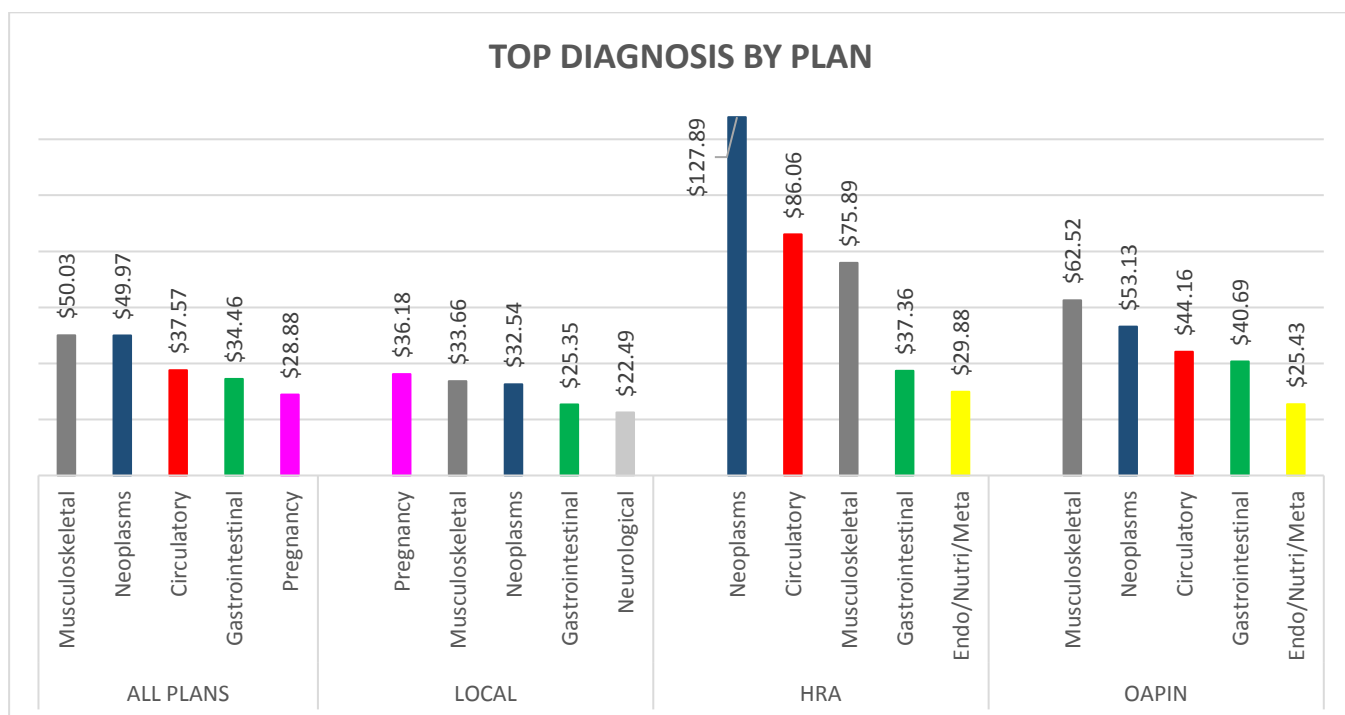
	All Plans		Change
	2015/16	2016/17	
Medical Expenses	\$475.99	\$460.02	(\$15.98)
Admin Expenses	\$25.48	\$25.14	(\$0.34)
Total Expenses	\$501.48	\$485.16	(\$16.32)

	Local Plus		Change	HRA*		Change	OAPIN		Change
	2015/16	2016/17		2015/16	2016/17		2015/16	2016/17	
Medical Expenses	\$326.70	\$332.09	\$5.39	\$661.55	\$679.33	\$17.78	\$544.85	\$531.07	(\$13.79)
Admin Expenses	\$24.45	\$23.75	(\$0.70)	\$35.49	\$35.77	\$0.28	\$24.70	\$24.84	\$0.13
Total Expenses	\$351.15	\$355.84	\$4.69	\$697.04	\$715.11	\$18.07	\$569.56	\$555.90	(\$13.65)

* Excludes HRA Contribution (\$750 per employee per year)

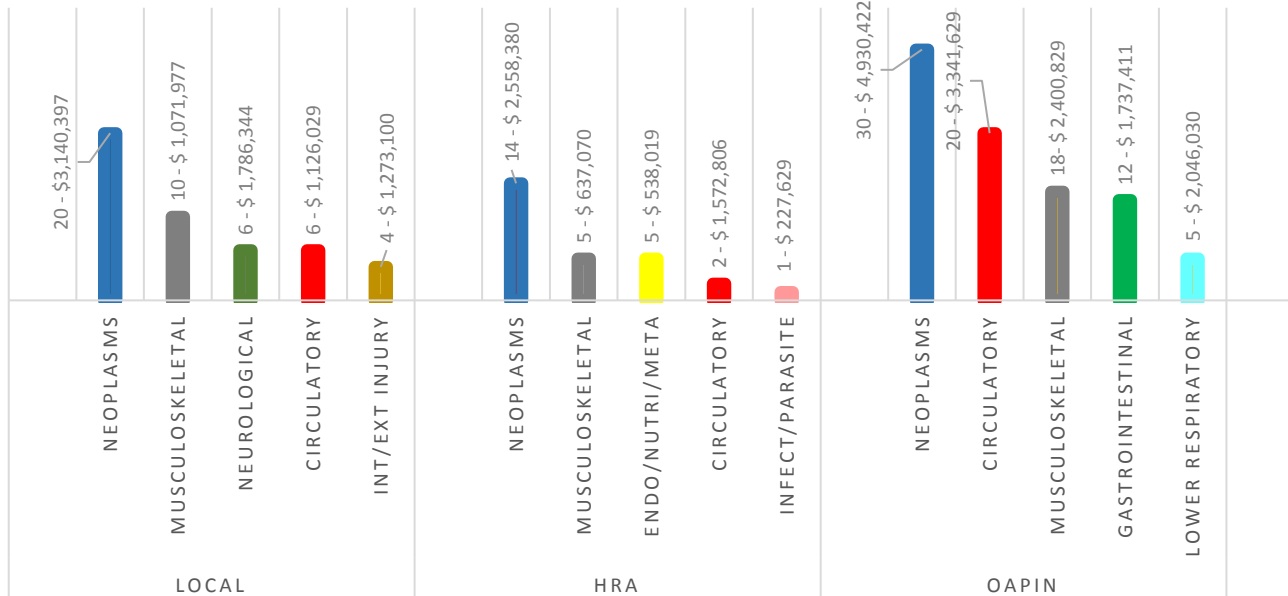
Reporting Timeframe – October 2016 – September 2017

TOP DIAGNOSIS BY PLAN



Top Diagnosis			
All Plans	Local	HRA	OAPIN
Top Diagnosis by Plan			
Musculoskeletal	Pregnancy	Neoplasms	Musculoskeletal
Top Three Contributors to Top Diagnosis			
Back	Conditions of Preg/Labor/Delivery	Female Breast	Joint
Joint	Normal Pregnancy and Delivery	Care and Treatment	Back
Fractures / Dislocations	Miscarriage	Benign	Fractures / Dislocations
Total Cost of Plan Spend			
24.9%	24.1%	35.9%	26.6%

Reporting Timeframe – October 2016 – September 2017

CATASTROPHIC CLAIMS AND TOTAL SPEND

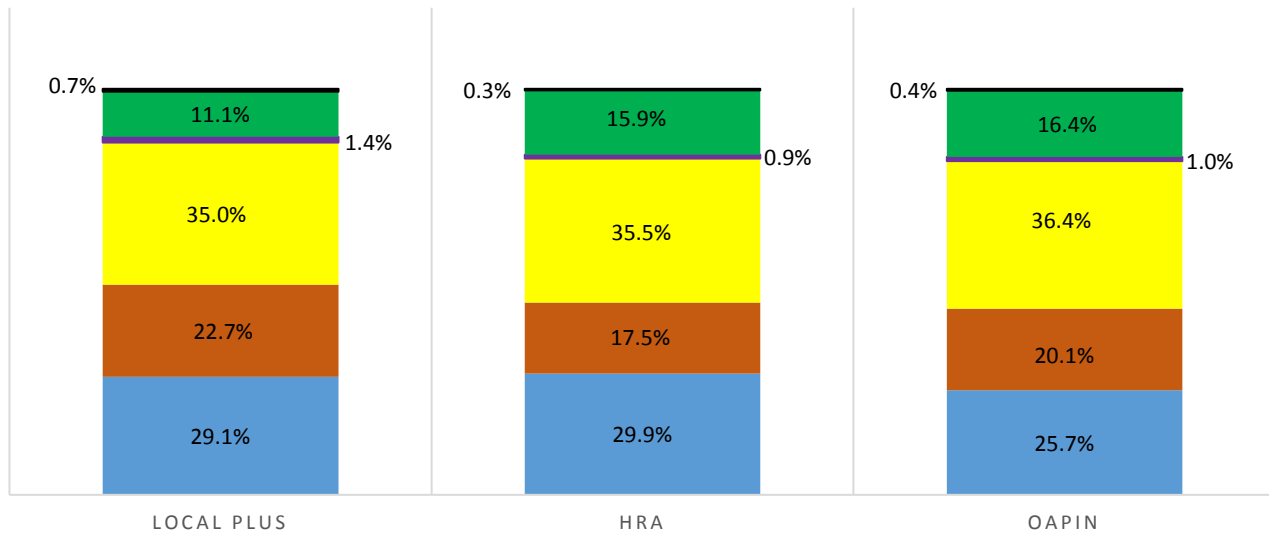
Catastrophic Claims			
	Local	HRA	OAPIN
Top Catastrophic Diagnosis by Plan			
Employees	65.8%	93.5%	73.5%
Spouses	19.2%	3.2%	15.9%
Dependents	15.1%	3.2%	10.6%
Over \$500K	2	1	4
\$300K - \$499K	11	3	9
Claims / 1,000 (PY)	5.1 (4.7)	13.0 (14.8)	9.2 (8.9)

Catastrophic Claims				
	All Plans	Local	HRA	OAPIN
Top Catastrophic Diagnosis by Plan				
# of Claims for Period (PY)	262 (252)	73 (55)	31 (40)	159 (158)
Spend for Period (PY)	\$47,190,950 (\$47,222,820)	\$12,672,699 (\$11,232,443)	\$6,024,066 (\$6,634,529)	\$28,494,185 (\$29,355,848)
Increase in Cost	-0.1%	12.8%	-9.2%	-2.9%
Average cost / claim (PY)	\$180,341 (\$187,646)	\$172,739 (\$196,733)	\$194,616 (\$169,078)	\$168,255 (\$181,458)

Reporting Timeframe – October 2016 – September 2017

TOTAL PLAN SPEND BY PLAN

■ Inpatient
 ■ Outpatient
 ■ Professional Services
 ■ Behavioral Health
 ■ Pharmacy
 ■ PPACA



Inpatient		
Local	HRA	OAPIN
Top Categories Inpatient by Cost		
Pregnancy	Musculoskeletal	Musculoskeletal
Newborn	Pregnancy	Pregnancy
Musculoskeletal	Circulatory	Digestive
Digestive	Digestive	Circulatory
Circulatory	Liver	Newborn
Average Cost per Admit (PY)		
\$18,952 (\$17,382)	\$27,943 (\$22,687)	\$23,239 (\$23,051)
Average Cost per Bed Day (PY)		
\$5,101 (\$4,446)	\$5,280 (\$5,358)	\$5,549 (\$4,988)

Top Facilities by Plan Spend

Name	Unique Claimants	Outpatient Visits	Admissions	Bed Days	Inpatient Spend
FLORIDA HOSPITAL	5,041	13,227	921	3,838	\$24,930,274
ORLANDO HEALTH	4,326	11,719	1,214	4,162	\$21,794,452
HCA NORTH FLORDIA	336	458	54	205	\$1,424,083
ST JOSEPHS HOSPITAL	3	7	1	75	\$758,591
MAYO CLINIC FLORIDA	20	44	7	50	\$309,824
ALL CHILDRENS HOSPITAL	4	12	4	36	\$252,675
EMORY UNIVERSITY HOSPITAL	3	17	2	16	\$258,592
HOLMES REGIONAL MEDICAL CENTER	11	22	7	22	\$112,944
SHANDS JACKSONVILLE MEDICAL CENTER	4	5	1	20	\$111,888
H LEE MOFFITT CANCER CTR & RESEARCH INSTITUTE HOSPITAL	27	150	3	29	\$102,247

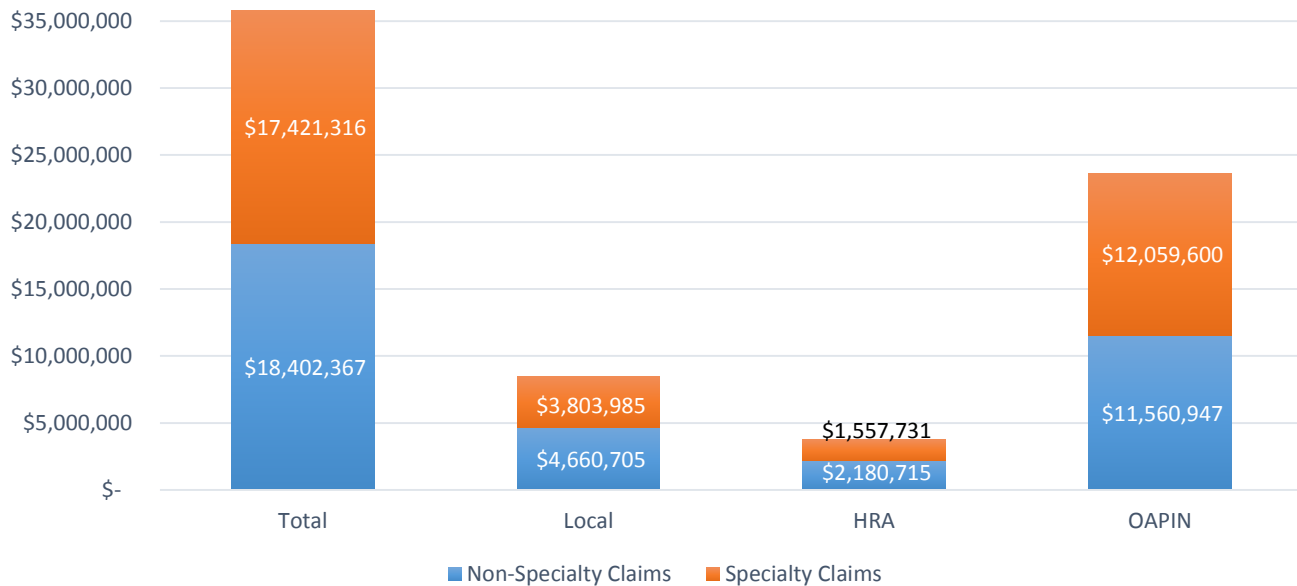
Reporting Timeframe – October 2016 – September 2017

Outpatient			
	Local	HRA	OAPIN
Top Outpatient Diagnosis by Utilization			
	Neoplasms	Neoplasms	Neoplasms
	Musculoskeletal	Musculoskeletal	Musculoskeletal
	Gastrointestinal	Gastrointestinal	Gastrointestinal
Average Cost for PCP Visit (PY)			
	\$137 (\$131)	\$114 (\$112)	\$118 (\$114)
Average Cost for Specialist Visit			
	\$188 (\$191)	\$172 (\$168)	\$175 (\$170)
Top Urgent Care Diagnosis by Utilization			
	Ear/Nose & Throat	Ear/Nose & Throat	Ear/Nose & Throat
	Musculoskeletal	Musculoskeletal	Musculoskeletal
	Lower Respiratory	Lower Respiratory	Lower Respiratory
Top Emergency Room Diagnosis by Utilization			
	Musculoskeletal	Musculoskeletal	Gastrointestinal
	Gastrointestinal	Gastrointestinal	Musculoskeletal
	Int/Ext Injury	Neuro/Cerebrovascular	Circulatory
Steerable Emergency Room (PY)			
# of Visits	363 (264)	52 (53)	319 (409)
Potential Savings	\$53,848 (\$111,556)	\$5,081 (\$18,703)	\$45,786 (\$202,505)
UC within 10 miles	98%	100%	98%

ER/UC VISITS/1000 BY DAY OF THE WEEK		
Day of the Week	ER Visits/k Mbrs	UC Visits/k Mbrs
Sunday	28.3	53.6
Monday	31.1	57.7
Tuesday	29.5	49.6
Wednesday	26.1	49.8
Thursday	27.6	46.2
Friday	28.9	48.8
Saturday	28.0	52.3
Total	199.5	357.8

Reporting Timeframe – October 2016 – September 2017

Pharmacy Claims



All Drugs			
All Plans	Local	HRA	Network
Total Prescriptions by Plan			
298,952 (299,037)	86,743 (73,036)	31,341 (35,054)	180,868 (190,771)
Pharmacy Generic Dispensing Rate (PY)			
91.2% (90.9%)	91.5% (91.1%)	90.8% (90.5%)	91.1% (90.9%)
All Drugs			
All Plans	Local	HRA	Network
Top Therapeutic Classes by Cost			
Analgesics - Anti-Inflammatory	Analgesics - Anti-Inflammatory	Antidiabetics	Analgesics - Anti-Inflammatory
Antidiabetics	Endocrine and Metabolic Agents	Analgesics - Anti-Inflammatory	Antidiabetics
Antivirals	Antivirals	Antivirals	Antivirals

Specialty Drugs			
All Plans	Local	HRA	Network
% of Total Prescriptions			
1.0% (1.0%)	0.8% (0.9%)	1.0% (1.1%)	1.1% (1.1%)
% of Total Net Rx Cost			
45.2% (44.2%)	41.4% (38.6%)	38.6% (42.7%)	47.7% (45.9%)
Specialty Drugs			
All Plans	Local	HRA	Network
Top Specialty Classes by Cost			
Rheumatoid Arthritis	Rheumatoid Arthritis	Rheumatoid Arthritis	Rheumatoid Arthritis
Human Immuno-deficiency	Growth Hormone and Related Disorders	Human Immuno-deficiency	Multiple Sclerosis
Growth Hormone and Related Disorders	Human Immuno-deficiency	Psoriasis	Human Immuno-deficiency

Reporting Timeframe – October 2016 – September 2017

Therapeutic/Specialty Class with Drug Name						
Therapeutic (Specialty) Class	Drug Name	Gross Cost	Utilizers	% of Class Gross Cost	% of Class Utilizers	Cost per RX
Analgesics - Anti-Inflammatory (Rheumatoid Arthritis)	Class Total	\$ 4,942,986	5,792			
	Humira	\$ 2,854,411	70			\$ 7,281.66
	Enbrel	\$ 1,337,331	38			\$ 7,001.74
	Top Drugs Total	\$ 4,191,742	108	85%	2%	
Antidiabetics	Class Total	\$ 4,450,294	2,386			
	Levemir Flextouch	\$ 767,433	257			\$ 1,067.36
	Novolog	\$ 591,802	125			\$ 1,545.18
	Novolog Flexpen	\$ 515,309	156			\$ 1,269.23
	Tanzeum	\$ 321,907	101			\$ 1,012.28
	Victoza	\$ 265,625	90			\$ 1,207.39
	Top Drugs Total	\$ 2,462,076	729	55%	31%	
Antivirals	Class Total	\$ 3,334,800	2,463			
(Human Immunodeficiency)	Genvoya	\$ 469,853	22			\$ 4,517.82
	Truvada	\$ 425,863	45			\$ 2,550.08
	Stribild	\$ 326,133	13			\$ 5,346.44
(Hepatitis C)	Harvoni	\$ 444,528	7			\$ 31,752.00
	Top Drugs Total	\$ 1,666,377	87	50%	4%	
Dermatologics	Class Total	\$ 2,986,915	5,556			
	Stelara	\$ 975,585	18			\$ 14,781.59
	Top Drugs Total	\$ 975,585	18	33%	<1%	
Endo/Meta Agents (Growth Hormone, Related Disorders)	Class Total	\$ 2,720,904	455			
	Humatrope	\$ 2,110,836	39			\$ 9,508.27
	Top Drugs Total	\$ 2,110,836	39	78%	9%	
Multiple Sclerosis	Class Total	\$ 1,883,460	33			
	Copaxone	\$ 674,385	13			\$ 11,055.50
	Tecfidera	\$ 331,072	7			\$ 7,882.66
	Aubagio	\$ 277,586	6			\$ 9,913.80
	Top Drugs Total	\$ 1,283,043	26	68%	79%	
Oncology	Class Total	\$ 1,835,399	40			
	Ibrance	\$ 537,942	4			\$ 14,156.38
	Top Drugs Total	\$ 537,942	4	29%	10%	

Reporting Timeframe – October 2016 – September 2017

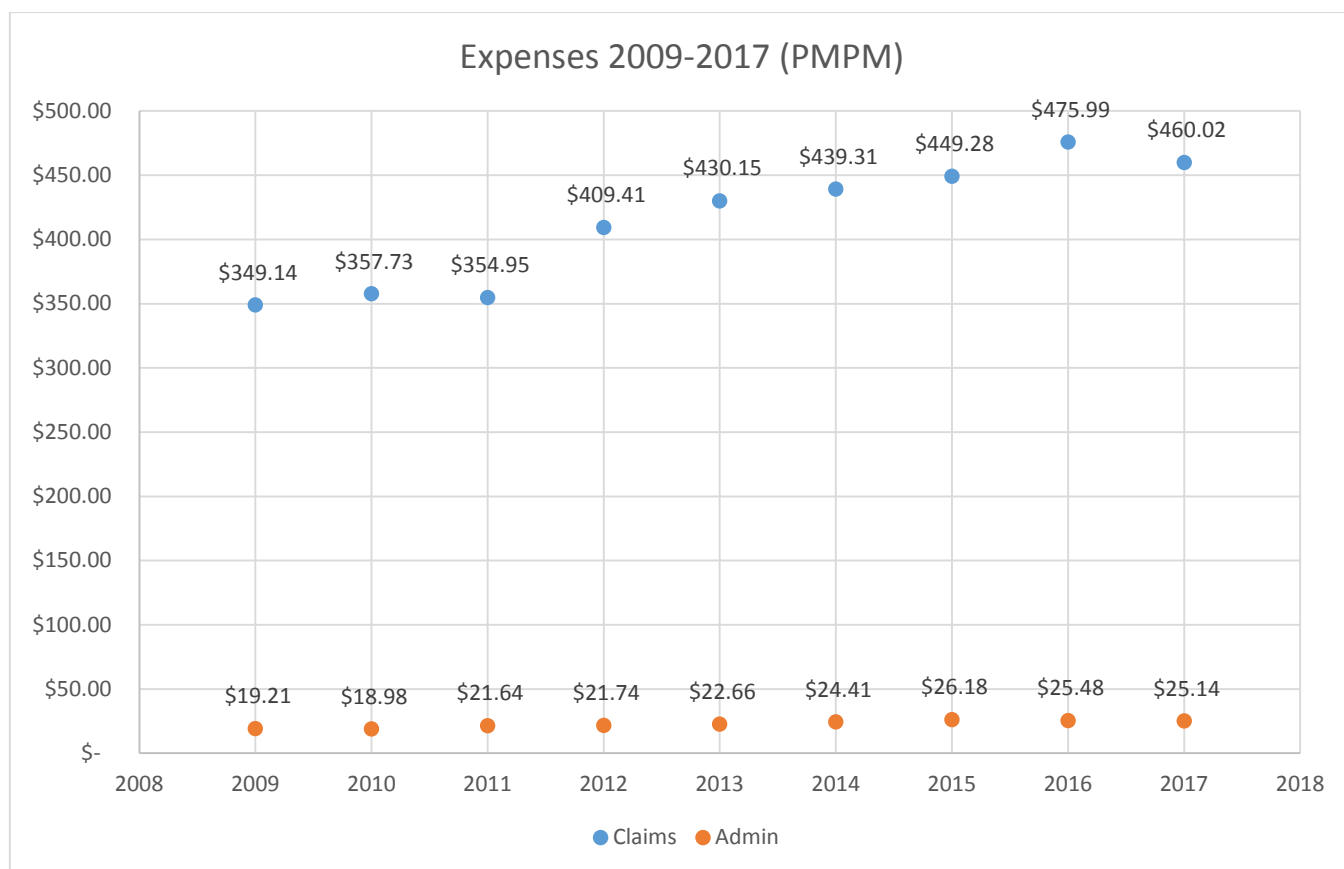
Behavioral Health						
All Plans # of Cases and Spend						
	2016		2017		Inc (Dec)	
Inpatient	117	\$ 410,392	105	\$ 259,476	-10%	-37%
Autism	181	\$ 500,448	205	\$ 379,782	13%	-24%
Outpatient	8,630	\$ 1,078,716	8,531	\$ 989,287	-1%	-8%
Long Term Intensive	339	\$ 246,215	272	\$ 191,228	-20%	-22%
TOTAL	9,267	\$ 2,235,771	9,113	\$ 1,819,772	-2%	-19%
PMPM		\$ 5.65		\$ 4.82		-15%
All Plans # of Visits and Spend						
Employee	10,275	\$ 1,164,548	9,681	\$ 907,527	-6%	-22%
Spouse	1,148	\$ 143,551	1,135	\$ 99,398	-1%	-31%
Dependent	7,885	\$ 927,672	8,489	\$ 812,847	8%	-12%
TOTAL	19,308	\$ 2,235,771	19,305	\$ 1,819,772	<1%	-19%

	Local		HRA		OAPIN	
All Plans # of Cases and Spend						
Inpatient	53	\$ 131,645	7	\$ 13,923	45	\$ 113,909
Autism	90	\$ 141,994	9	\$ 39,165	106	\$ 198,623
Outpatient	3,121	\$ 367,823	631	\$ 75,095	4,779	\$ 546,369
Long Term Intensive	74	\$ 49,553	47	\$ 35,025	151	\$ 106,650
TOTAL	3,338	\$ 691,014	694	\$ 163,208	5,081	\$ 965,550
PMPM		\$ 4.25		\$ 6.38		\$ 5.09
All Plans # of Visits and Spend						
Employee	3,420	\$ 337,831	1,185	\$ 118,038	5,076	\$ 451,658
Spouse	513	\$ 46,970	18	\$ 1,569	604	\$ 50,859
Dependent	3,041	\$ 306,213	503	\$ 43,601	4,946	\$ 463,033
TOTAL	6,974	\$ 691,014	1,706	\$ 163,208	10,626	\$ 965,550

Top 5 Diagnosis	
Diagnosis	%
Autism	21.6%
Mood Disorder	20.4%
Anxiety Disorder	18.7%
Adjustment Disorder	13.3%
Attention Deficit	6.1%

Employee Benefits Trust

Reporting Timeframe – October 2016 – September 2017



YTD Administrative Costs = 5.5% of Claims Costs