

## Sample D.A.T.E. Payout Timeline

| Start Date | Activity   | Person/Department Responsible   | Receiving Department          | Target Date               | Date Completed | Status/Notes |
|------------|--|---------------------------------|-------------------------------|---------------------------|----------------|--------------|
| January 6  | Confirm TRS/ERS eligibility  | Payroll                         | Payroll/ Program Manager      | January                   |                |              |
| January 20 | <b>Compensation Guidelines</b> Draft for <b>planning committee</b> | Program Manager/MIS/ Assessment | DATE grant Planning Committee | January 20                |                |              |
| January 20 | Committee reviews/edits Compensation Guidelines                    | DATE grant Planning Committee   | Program Manager               | January 22                |                |              |
| January 22 | Compensation Guidelines with Committee edits                       | Program Manager                 | HR/Legal                      | January 26                |                |              |
| January 26 | <b>Prepare teacher and student information for payouts</b>         | Assessment/MIS                  | Assessment/MIS                | January 30                |                |              |
| January 26 | Compensation Guidelines Approval                                   | HR/Legal                        | Program Manager               | February 3                |                |              |
| February 3 | Compensation Guidelines Revisions                                  | Program Manager/ HR/Legal       | Program Manager/HR/Legal      | February 5                |                |              |
| February 3 | <b>1st Employee Eligibility Report</b>                             | MIS                             | Program Manager/ Audit        | February 4<br>February 10 |                |              |
| February 5 | Presentation to DATE Grant Planning Committee                      | Superintendent                  | DATE grant Planning Committee | February 5                |                |              |
| February 6 | Incorporate DATE Grant Planning Committee Revisions                | Superintendent/ Program Manager | Committee                     | February 9                |                |              |
| February 6 | Draft/Print Eligibility Letter                                     | Program Manager                 | Program Manager               | February 9                |                |              |
| February 9 | Eligibility Letters to Teachers via scheduled campus visits        | Program Manager                 | <b>DATE Campuses</b>          | February 20               |                |              |

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|             |  |                                    |                                      |             |  |  |
|-------------|--|------------------------------------|--------------------------------------|-------------|--|--|
| February 19 | DATE Grant Presentation Board Meeting  | Superintendent                     | Board                                | February 19 |  |  |
| February 27 | <b>Eligibility Letters Due</b>   | DATE Campuses                      | Program Manager                      |             |  |  |
| March 23    | <b>Collaborative Meeting Check-in</b>  | Program Manager                    | DATE Campuses                        | April 3     |  |  |
| June        | <b>In-district transfers</b>   | HR                                 | Program Manager                      | June        |  |  |
| June 8      | TAKS Data to district from TEA   | Assessment                         | MIS                                  | June 15     |  |  |
| June 12     | <b>Campus Collaborative Meeting Reports due</b>                                  | DATE Campuses                      | Program Manager                      | June 19     |  |  |
| June 12-26  | Calculate Part I RPI Awards (60%), Part II Mtg. Stipend Awards, Retention Awards | Program Manager/<br>Assessment     | Audit/MIS                            | July 6      |  |  |
| June 15     | <b>1<sup>st</sup> Retiree Check</b>  | Payroll                            | Program Manager                      | June        |  |  |
| June 15     | 2 <sup>nd</sup> Employee Eligibility Report                                      | MIS                                | Audit                                | June 19     |  |  |
| July        | 2 <sup>nd</sup> Retiree Check  | Payroll                            | Program Manager                      | July        |  |  |
| July        | Draft and Print Award Notifications  | Program Manager                    | Payroll/HR/DATE Committee/Principals |             |  |  |
| August      | <b>Determine budget codes</b>  | Payroll                            | Payroll/HR/Business Office           | August      |  |  |
| August 10   | Calculate 40% Part II awards. Add to existing calculations.                      | MIS/Program Manager/<br>Assessment | Audit                                | August 11   |  |  |
| August 11   | Print Award Notifications/Labels   | MIS/Program Manager                | Program Manager                      | August 12   |  |  |
| August 12   | Populate Award Notifications   | MIS                                | Program Manager                      | August 12   |  |  |
| August 13   | Deliver award notifications  | Program Manager                    | Program Manager/Principals           | August 13   |  |  |
| August 13   | <b>Award Inquiries</b>   | Teachers                           | Program Manager                      | August 17   |  |  |

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|              |   |                 |                         |              |  |  |
|--------------|---|-----------------|-------------------------|--------------|--|--|
| August 18    | <b>Changes based on inquiries</b>             | Program Manager | Teachers/MIS            | August 21    |  |  |
| August 24    | <b>Retention Stipend Verification/Removal</b> | MIS             | Program Manager         | August 24    |  |  |
| August 24    | <b>Final Roster</b>                           | Program Manager | Audit                   | August 25    |  |  |
| August 25    | <b>Finalize Audit Testing</b>                 | Audit           | Payroll/Program Manager | September 18 |  |  |
| August 31    | <b>TEA Draw-down</b>                          | Program Manager | Payroll                 | September 18 |  |  |
| September 25 | PAYDAY  | Payroll         |                         |              |  |  |

**Departments involved:** MIS, Assessment/Audit, Payroll, HR, Program Manager, D.A.T.E Committee

**Compensation Guidelines:** For all teachers on D.A.T.E. Grant campuses; includes:

Grant qualifying requirements

Math/Science award eligibility

Non-traditional teaching positions/situations

Definition of grant terms

Award schedules (amounts/subject/sub pop)

**Eligibility Letter** that defines:

Eligible/not eligible with justification

Applicable award schedule

Teacher requirements

Letter of eligibility and Acknowledgement of requirements MUST be signed and returned to regardless of eligibility to grant coordinator through campus admin.

## Sample D.A.T.E. Payout Timeline

**Print/Populate Compensation Guidelines:** This will be a MASS printing where each Letter of Eligibility (found in the Compensation Guideline) will need to include:

1. NAME
2. Campus RPI/Value-added growth charts with disaggregated award amounts
3. Part I AWARD Schedule they are eligible for **OR** all Part I AWARD schedules they are eligible for
4. Part II AWARD schedule they qualify for (meeting or retention stipend or both)

**Employee Eligibility Report:** Run by MIS, to assist in determining/maintaining eligibility, a report that includes determining factors of eligibility (eligible campus, master schedule assignments,...)

**Interim Report:** Run by Audit, taken from the Employee Eligibility Report, to assist in determining/maintaining eligibility and award amounts.

**Collaborative Meeting Check-In:** Done by grant administrator, a form that will document, per teacher, the dates and titles of collaborative meeting attended from September 1, 2008- March 31, 2009. Master Teacher and Campus administrators will assist in this collection. **Campus Collaborative Meeting Final Reports** will be used to determine eligibility for the meeting stipend offered under Part II. Teachers must attend 80% of 15 collaborative meetings to qualify.

**In-District Transfers:** A list of current employees who want to transfer from on campus at the end of the 08-09 school year to another campus for the 09-10 school year. A transfer can impact award amount and/or eligibility.

**Retiree Check:** Monthly check performed by payroll to monitor DATE grant participants who retire. Will impact their AUGUST check.

**Calculate Part I RPI Awards:** 60% of Part I award based on TAKS data.

**Calculate Part II Meeting Awards:** Collaborate meeting attendance stipends based on Campus Collaborative Meeting Final Report.

**Audit Testing:** Internal audit verifying eligibility and pay calculations

**Budget Codes:** Need to be assigned

**Calculate Part I Awards:** 40% of part I awards based on value-added growth data

## Sample D.A.T.E. Payout Timeline

**Populate and Print Award Notifications:** Necessary for required appeals process. Each eligible teacher will need a letter to include:

1. NAME
2. Campus TAKS results disaggregated by test/sub pop and correlated to award amounts
3. Amount awarded from Part I AWARD Schedule **OR** total amounts awarded from more than one Part I AWARD schedule
4. Amount from Part II AWARD schedule they qualified for distinguished by collaborative meeting stipend and retention stipend (eligibility meeting stipend and retention stipend).

**Inquiries:** August 13-17. Teachers may inquire about their award amounts during this time period.

**Retention Stipend Verification:** MIS will run. Pertains only to secondary Math and Science teachers. An attendance run on the first day of school (for kids) to verify that Math and Science teachers have returned to a Math and Science teaching capacity at a DATE campus. Remaining portion of Part II AWARDS will be calculated using this information. This will result in a final award eligibility roster for all DATE campuses.

**Final Roster:** Will be run by MIS, verified/corrected by Program Manager and sent to Audits for a Final Report.

**Final Report:** Verified by Audits. This will result in a final award roster which will be used to run payroll. The TEA funds draw-down will take place based on this final amount.

**TEA Funds Draw-down:** Program Manager must make a “funding” request from TEA to have the funds deposited to district. This takes three-business days from the day after the request is received.