

Payout Process Challenges and Potential Solutions

Avoiding a crisis in the endgame.

Common Challenges and Potential Solutions

Challenge: Teachers and staff are unclear as to who is eligible to receive an award.

Solution: Determine eligibility requirements for payouts and communicate well in advance to ensure clear understanding. This will avoid issues after awards are distributed. For example, must a teacher or staff member be employed by a certain cut-off day to receive an award? Will a teacher or staff member received an award if s/he leaves the campus or district? What is a teacher or staff member retires? If a teacher or staff member changes positions during the implementation year, will s/he be eligible for an award under either teacher or staff job classification?

Document all processes and be transparent. Include policies for people who go on leave or arrive mid-year. For example, you may pro-rate award amounts by the percentage of days worked, set cut-off dates by which teachers must begin teaching in eligible campuses to be included in the plan, include provisions for maternity and sick leave, etc.

Challenge: Risk of paying out inaccurate award amounts.

Solution: Avoid paying inaccurate award amounts and incorrect staff by implementing a system of checks and balances to review incentive checks for accuracy. Consider using a payout verification system prior to distributing checks. Give teachers and staff their calculated award amount and documentation that explains how it was calculated. Allow time for verification and adjustments.

Have teachers and principals sign off on estimated award amounts. Incorporate an inquiry process in the payout timeline to address any issues before cutting checks. Coordinate with human resources and data/accountability to ensure you will have the proper data in place before the verification process and before cutting checks.

Challenge: Managing the payout process is challenging.

Solution: Proper planning can ensure timely payouts and reduce potential issues. It is critical to engage important departments- such as payroll, human resources, and data/accountability- into the payout planning process. Create a list of critical activities and incorporate these activities into a timeline to avoid missing a critical step. Develop a communication plan and communicate with all stakeholders frequently to keep abreast of progress toward tasks and activities.

D.A.T.E. Performance Award Program Implementation

Challenge: Communicating effectively with teachers, staff, and other stakeholders.

Solution: To inform teachers and staff of payout timelines, create one presentation for principals to give at all campuses to communicate a consistent message. Create an FAQ document to answer frequently asked questions about the payout process. Use campus leaders to serve as program “experts,” to drive progress and answer questions. Post document in teacher’s lounges, website, etc. Use the end of the year teacher and staff “check out” to review the payout process and results with each individual staff member. Create a checklist that includes performance measure results and have them sign off to ensure understanding and agreement.

Ensure that teachers and staff are aware that taxes, benefits, and retirement deductions may be deducted from their award amounts and avoid “surprises.” Inform teachers and staff that performance awards (in some instances) are counted as salary and might push them into different tax brackets.

Be cautious when providing timelines and dates for payouts. A district may plan to pay awards in May, but actually pay in July or August. **Avoid giving hard dates, just in case you encounter problems along with way.**

Communicate with teachers and staff once the payouts have been awarded. Teachers and staff may not realize they received their payout if it was included as a separate line item within their monthly payroll check.

Challenge: Unprepared to gather the data.

Solution: Coordinate with your district’s data/accountability division to ensure that the district is prepared to gather all data needed to determine award amounts. Run a simulation of the award amounts to iron out any glitches before the actual payouts occur. Coordinate with campus principals to ensure that principals will have all collaboration, team planning, tutoring/mentoring, professional development, and other campus-based data ready and available to determine payouts at the end of the year. Create checklists for principals to include all teacher and staff requirements; have staff and principals review documentation and sign off on completion at the end of the year.

Tools and Resources

Sample Payout Timelines and Process Charts:

<http://www.txeducatorawards.org/materials.html>

<http://www.txeducatorawards.org/implementation.html>

Sample Payout Communication Plan:

<http://www.txeducatorawards.org/materials.html>

<http://www.txeducatorawards.org/implementation.html>

Key Payout Stakeholders and Activities:

<http://www.txeducatorawards.org/materials.html>

<http://www.txeducatorawards.org/implementation.html>

Payout FAQ’s:

<http://txeducatorawards.org/faq.html>