PERFORMANCE MANAGEMENT INCENTIVE (PMI)

MISSION STATEMENT

The mission of Performance Management Incentive (PMI) is to encourage professional endeavors that directly benefit Thompson R2-J students through academic or enrichment activities and indirectly through organizational support.

PMI is designed to pay the school professional for activities not compensated through the salary schedule, extra duty contracts, outside agency pay, course credit, student fees, or compensatory time.

PMI submissions are reviewed by a committee of peers that is supervised and governed by Human Resources.
Dear PMI Participants,

It is the belief of the Thompson R2-J School District that its teachers have always contributed countless hours for which they have not been compensated. As a result, it was agreed upon through the 1993-94 negotiation process that “teachers may participate in a performance management pilot,” (from the MOU) in which teachers’ extra contributions could be rewarded. Since then, the pilot has been tested, revised, and in 1996 became an established program. Approximately $150,000 is available for this program, known as PMI.

**Not all activities or duties teachers perform are eligible for PMI points.** This packet provides an overview of activities and duties for which teachers are already compensated, guidelines from the MOU on how teacher evaluations impact PMI participation, and the other guidelines and directions for participation in the PMI process. The PMI Committee urges you to read this packet carefully and take advantage of any other training opportunities to benefit fully from this program.

Sincerely,
The PMI Committee

**Table of Contents**

- Who is eligible for PMI? 3
- What is eligible for PMI? 4
- Link to the Category D pre-approval form 4
- What is NOT eligible for PMI? 5
- Categories/Criteria 6-9
- How hours are converted to points 10
- Appeal Process 10
- Filling out the forms: FAQs 11-12
- PMI Calendar 14

Necessary forms and information are available on the TEA and District Websites

**ELECTRONIC Submissions ONLY** via Google PMI Report Form located on TSD website under Staff→Employee Forms→Performance Management Incentive. **ALL PMI Forms are located on the TSD website.** For additional questions, please email pmi@tsd.org.
Who is eligible for PMI?

- All licensed staff receiving an overall rating of proficient or higher on the educator effectiveness in TSD the previous year may participate in the PMI program and earn additional compensation to be paid in June of the current school year. (Refer to your evaluation)
- Licensed staff who complete a minimum of 40 hours of eligible activities in a single year.
- Licensed staff with a Non-effective rating are not eligible for PMI.
- Licensed staff cannot accrue PMI hours while on a leave of absence.

FAQs

What is the rationale for a 40-hour minimum before PMI can be paid?
We believe this is an achievable, yet meaningful, measure of service as it approximates one hour per week of additional professional service throughout the school year. We wish to reward significant contributions to the education of our students.

What if I am new to the district and don’t have an evaluation?
All participants need to have a Thompson R2-J district evaluation from the previous school year in order to be eligible to participate in the PMI program.

What if I was on leave during the previous school year?
Your most recent evaluation will be used to determine your eligibility.

May counselors, social workers, psychologists, nurses, and certified librarians earn PMI points?
Yes. All licensed professionals on the teacher salary schedule may participate.

Can part-time teachers participate in the PMI program?
Yes, but eligible activities must occur outside the school professional’s contract day. Part-time teachers still need to meet the 40 hour minimum requirement.

There are some events that may occur outside this contract time that are considered part of the job and are not eligible for PMI compensation. These include:

- Any meetings, planning, etc. that occur during the professional development/planning days (during the 100% contract day, such as 7:30-3:30 or 8:00-4:00) before students begin the year are not eligible for PMI compensation. These meetings are considered part of your job.
- CONFERENCES WITH PARENTS do not count for PMI.

Where can I find PMI forms?

- All PMI Forms and documentation are located on the TSD Website
  - Navigate to thompsonschools.org
  - Hover over STAFF at the top, click on FOR CURRENT STAFF
  - On the left-hand side of the page, click on EMPLOYEE FORMS
  - Scroll down to find PERFORMANCE MANAGEMENT INCENTIVE (PMI)

Updated: 3/9/22
What is eligible for PMI?

Activities must take place outside of contract time unless pre-approved. Contract time is based on an 8-hour day.

PMI activities are divided into four categories:

**Category A:** All Summer Activities with Students (only submitted with summer/fall hours)
This includes all activities that are not compensated for supervision of Thompson School District students during the summer months. This category is limited to 125 hours per year.

**Category B:** Building Support
This includes all activities that are supported by your assigned building(s).

**Category C:** Professional Leadership/District Support
This includes leading adults as a presenter, officer, or facilitator for state organizations or district committees.
State and National leadership activities in this category are limited to 60 hours per year.

**Category D:** Directing Student Enrichment
This includes conducting activities involving student enrichment, academic support or leadership of students. This category needs a pre-approval form for those hours that occur within the 8-hour contract day.
You MUST send a Category D pre-approval form to pmi@tsd.org prior to the start of the activity. You also need to provide a roster of the students participating in the activity.
This category is limited to 125 hours per year.

**Category D pre-approval form**
What is not eligible for PMI?

Duties and responsibilities that are considered part of the profession or that can be compensated through the salary schedule, extra duty contracts, outside agency pay, course credit, student fees or time.

- **Educator Effectiveness**
- **Filling out the PMI form. :)**
- **Planning, assessment and delivery of district curriculum**
- Duties/supervision within the contract day do not count (excluding soft-starts)
- Meetings - staff meetings and staffings **within** the contract day
- Conferences with instructional coaches
- Parent/teacher conferences and informal communication with parents (although weekly newsletters do count)
- Classes, conferences, clinics and workshops (This includes those that are recommended by administrators.)
- **Any political action activities**, including school district elections
- Activities as a parent at a building other than your job assignment
- Work with student aides or volunteers from outside sources
- Attendance at staff social events
- Programs involving universities and teachers in training (student teachers)
- **Volunteer** coaching and unofficial stat work
- Extra-duty contracts begin one week before teacher contract time and end the last day of school. **Activities related to extra-duty contracts that occur during this time period are not eligible for PMI.**
- Any activities during the contract day that are not pre-approved.
- Setting up and taking down labs for class. (science units or stations)
- Shopping (i.e., school supplies, FOSS Kit materials, activities, etc.)

Only the PMI Committee can approve hours. If the leader of your group says, “You can count this for PMI,” please verify through the PMI Committee. You can contact the PMI Committee by emailing pmi@tsd.org.
CRITERIA FOR PERFORMANCE MANAGEMENT CATEGORIES

**Please explain initials and acronyms on forms***

Category A: All Summer Activities with Students - Weight 1.0

This includes all activities that are uncompensated supervision of Thompson School District students during the summer months.

This category is limited to 125 hours per year.

Criteria: All Summer Activities with Students are eligible for PMI if:

- Thompson R2-J students are involved. (These students should be from the teacher’s own school, although we know some summer activities involve multiple schools.)

- Activity is outside the contract school year, during the summer and not in any way part of an extra-duty contract.
  - Typically, extra-duty contracts run from one week before contract time through the last day of school. If you are claiming hours related to your extra duty contract, but can explain/justify how they are outside of the extra duty contract criteria and the season of the activity, these hours may be counted.
  - Athletic extra-duty contracts typically start the first day of your season. Although there are procedural events that typically take place pre- and post season that are the responsibility of the coach with the extra-duty contract (i.e., parent meetings, awards ceremonies, uniform check-in, etc.)

- Activities are not compensated through salary schedule, extra-duty contracts, outside agency pay, course credit, student fees, or compensatory time.

Category A Examples

- Summer district-sponsored overnight trips with students (limited to 16 hours per day)
- Summer tutoring programs
- Summer weight room
- Summer music camps
- Weight room supervision during the summer
CATEGORY B: Building Support  - Weight 1.2

This includes activities that support the building.

**Criteria: Building Support is eligible for PMI if:**

- Part or all of a building meeting occurs beyond the 8-hour contract day (and only hours beyond that 8-hour contract are claimed).
- Meeting time to support the building occurs on a non-contract day.
- **Elementary Soft Start**, that brings students into your room prior to the start of the student contact day.
- You are involved in organized supervision of students while attending school events outside of the contract day.

When a teacher is involved in building activities during the contract day, the time spent in planning for a substitute is eligible for PMI compensation. A maximum of one hour is eligible.

**PLANNING TIME MISSED WHILE OUT OF THE BUILDING IS NOT ELIGIBLE FOR COMPENSATION.**

**Category B Examples**

- All building committees
- Interview teams
- PTO, PTA, PTSA, SAAC, etc.
- Formal classroom volunteer training
- Grant writing
- Planning occurring outside the contract day **for Category D activities** (1 hr max)
- Preparation for field trips
- Student book orders
- Parent updates, such as Homework and/or “Friday” folders.
- Attending school events in which you are involved in organized supervision of students.
  - Carnivals
  - School sports
  - Showcases/all school programs/performances
  - Art shows
  - Family suppers
  - Student overnight trips during the school year: **16 hours** per day max for non-contract days
    - **8 hours** per day max for contract days
- SST (Student Support Team), student IEP meetings, etc.
- Writing letters of recommendation
- Weight room supervision **during the school year** outside the contract hours
- All Back-To-School, Parent Information Nights/Open Houses/Picnic, etc.
- **Summer curriculum articulation with team members** **16 hours maximum.**
CATEGORY C: Professional Leadership/District Support - Weight 1.4

When a teacher leads adults as a presenter, officer, or facilitator at the district or state level.

Criteria: Professional Leadership and District Support is eligible for PMI if:

- It involves adults.
- No other compensation in time, money, or other benefits of any kind is received.
- Preparation for a presentation and/or the presentation occurs outside the contract day.

When a teacher is involved in district activities during the contract day, the time spent in planning for a substitute is eligible for PMI compensation. A maximum of one hour per meeting is eligible in Category B.

Planning time missed while out of the building is not eligible for compensation.

Our district is involved in several programs involving universities and teachers in training (PTEP, Block I, student teachers, etc.). Because of the compensation received from universities for these programs, these hours are not eligible for PMI.

Category C Examples

- District committees
  - Professional Concerns Committee (PCC)
  - District Accountability
  - District Calendar Committee
  - Sick Leave Bank
- TEA representative (when no course credit or stipend is received)
- TEA executive board (when no course credit or stipend is received)
- Attending School Board meetings
- Negotiations team
- *Member of state/national committee or organization
- *Editorships of district/state/national magazines
- *NEA participation

*60 hours maximum in a calendar year for activity or combination of activities.
CATEGORY D: Directing Student Enrichment - Weight 1.6

This includes conducting activities involving student enrichment, academic support or leadership of students. This category needs a pre-approval form for those hours that occur within the 8-hour contract day. You MUST also provide a student roster when you submit your PMI documentation.

This category is limited to 125 hours per year.

Criteria: Directing Student Enrichment is eligible for PMI if:

- Students are involved.
- The time for the activity is regularly scheduled.
- The activity is outside the 8-hour contract day and not in any way part of an extra-duty contract.
- Activity occurs within the contract day and has been preapproved by the PMI Committee. During contract day activities will be capped at 40 hours to protect negotiated planning time and lunch.
  - You must fill out the Category D pre-approval form prior to the start of the activity and send it to pmi@tsd.org.
  - Planning for these activities goes under category B

Category D Examples

- Student clubs, groups, organization that meet regularly such as:
  - Elementary choirs
  - National Honor Society
  - Battle of the Books
  - Robotics
  - Performance Ensembles
  - Tutoring/lunch bunch
  - Be Fit Be Strong

- Activities that increase the probability of student achievement such as:
  - Non compensated tutoring outside the contract day
  - Family education nights
  - Home visits (outside the contract day)
  - REGULARLY-SCHEDULED AND PRE-APPROVED TUTORING DURING THE CONTRACT DAY (40 hour maximum)

Guidelines for Pre-approval (Category D activities during the contract day)

- Human Resources and the Association (TEA) does not advocate giving up planning or lunch times, but realize that sometimes this is the only time to meet with students. Any activities with students that take place during the contract day must be pre-approved for PMI credit. Classes for which students receive credit are not eligible.
  - Even if an activity was approved in the past, a pre-approval form must be submitted again this year. For pre-approval, complete the Category D Pre-approval Form. The maximum accepted time for compensation will be 40 hours in one contract year. PRE-APPROVAL APPLIES ONLY TO TIME WITHIN THE CONTRACT DAY.
  - Submit pre-approval forms to pmi@tsd.org

Updated: 3/9/22
HOW ELIGIBLE HOURS ARE CONVERTED TO ELIGIBLE PMI POINTS FOR PMI COMPENSATION

An educator has a positive impact by affecting the community and education as a role model in all the listed categories. However, the committee determined that a weighting process was needed because of the varying impact on students, teachers, and the district. The categories reflect many of the activities of teachers. Student learning and impact on the quality of instruction are considered the primary focus of education. The committee believes a teacher should be rewarded for greater participation in certain weighted categories that reflect this focus.

WEIGHTING CHART

<table>
<thead>
<tr>
<th>Category</th>
<th>Weight</th>
</tr>
</thead>
<tbody>
<tr>
<td>Category A: All Summer Hours with Students</td>
<td>1.0</td>
</tr>
<tr>
<td>Category B: Building Support</td>
<td>1.2</td>
</tr>
<tr>
<td>Category C: Professional Leadership/District Support</td>
<td>1.4</td>
</tr>
<tr>
<td>Category D: Directing Student Enrichment</td>
<td>1.6</td>
</tr>
</tbody>
</table>

These weights will be used to convert hours to points. Conversions and calculations:

1.0 means each hour will receive 1 point
1.2 means each hour will receive 1.2 points
1.4 means each hour will receive 1.4 points
1.6 means each hour will receive 1.6 points

The verification committee will convert all minutes to hours and hours to points. **Report hours on the Google PMI Report Form!**
When recording partial hours, please use a decimal representing the % of the hour.

15 minutes = .25
30 minutes = .50
45 minutes = .75, ETC.
PMI APPEALS PROCESS

Questions concerning hours approved and paid should be directed first to the PMI committee, in writing, by the calendar appeals deadline. If the teacher wants to appeal the decision of the PMI Committee they should put their appeal in writing and submit it to Human Resources within 10 days of receiving the PMI Committee’s reply.

Filling out the Forms: FAQs

**Do I need to keep documentation?**
Yes, you do need to keep and save records of the time spent and the activities because you may be asked for verification. Sign-in sheets should be submitted with the PMI form.

**Can I report more than 40 hours?**
Yes, **40 hours per year** is the minimum number of hours that must be reported in order to qualify for compensation.

**Do I report parts of hours, or do I round off?**
Keep exact time records in hours and partial hours. When recording partial hours, please use a decimal representing the % of the hour.

- **15 minutes = .25**
- **30 minutes = .50**
- **45 minutes = .75**, ETC.

**How does verification work?**
The participant fills out the documentation for his/her record sheet and attaches it in the Google PMI Report Form located on the TDS website (See pg. 2 of the PMI packet).

**When are the Google Form Open Windows dates?**
- Summer/Fall Hours - December 1st-31st
- Winter/Spring Hours - May 1st-12th

**Who can I contact if I have a question about PMI?**
Your TEA building rep may be able to help or send an email to pmi@tsd.org.

**How can I document my activities and hours?**
You must use the included forms, or something similar, for student activities.

**Where can I get extra forms?**
The forms are on the district website (See pg. 2 of the PMI packet).

Updated: 3/9/22
Can I submit the PMI Report Form in May, if I did not submit one in December?
Yes, you can submit hours in May for the second part of the year only (must still meet the 40 hour requirement.) **Hours from the first part of the year must be submitted by the December 31st deadline.**

**Why is the form submitted twice a year?**
Twice a year submission will encourage teachers to keep track of data, and allow the verification committee to ask for clarification documentation in a way that is more manageable.
Keeping Scrolling to page 14 for the PMI calendar

Updated: 3/9/22
<table>
<thead>
<tr>
<th>SUMMER / FALL</th>
<th>Date</th>
<th>Event</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>June 1st</td>
<td>Documentation Begins for Summer/Fall Hours</td>
</tr>
<tr>
<td></td>
<td>August 22nd - December 1st</td>
<td>Window for submitting your fall Category D pre-approval form</td>
</tr>
<tr>
<td></td>
<td>December 31st</td>
<td>Summer/Fall Documentation Ends</td>
</tr>
<tr>
<td></td>
<td>December 31st</td>
<td>Summer/Fall forms due to the PMI Committee using the Google PMI Report Form located <a href="#">here</a></td>
</tr>
<tr>
<td></td>
<td>First Saturday in January</td>
<td>PMI Committee meets to tally Summer/Fall hours</td>
</tr>
<tr>
<td>WINTER / SPRING</td>
<td>January 1st</td>
<td>Documentation Begins for Winter/Spring Hours</td>
</tr>
<tr>
<td>WINTER / SPRING</td>
<td>January 1st - April 13th</td>
<td>Window for submitting your spring Category D pre-approval form</td>
</tr>
<tr>
<td>WINTER / SPRING</td>
<td>January 31st</td>
<td>Appeal Period Ends for fall forms</td>
</tr>
<tr>
<td></td>
<td>May 12th</td>
<td>Winter/Spring forms due to the PMI Committee using the Google PMI Report Form located <a href="#">here</a></td>
</tr>
<tr>
<td></td>
<td>Saturday after the 12th</td>
<td>PMI Committee meets to tally Winter/Spring hours</td>
</tr>
<tr>
<td></td>
<td>May 26th</td>
<td>Appeal Period Ends for spring forms</td>
</tr>
<tr>
<td></td>
<td>June 27th</td>
<td>Compensation on your paycheck</td>
</tr>
</tbody>
</table>

- Ideally, compensation will be in your June 27th paycheck. Mistakes can be made, however. You will always receive your compensation, but it could be delayed because of clerical errors. Thank you for your patience and understanding.
- The PMI Spring- Fall deadline is the end of December. So turn it in before Winter break or finish it during your break!

Updated: 3/9/22