



NEW MEXICO
Public Education Department

Manual of Procedures for the Calculation of the Staffing Cost Multiplier

Training & Experience (T&E) Index
and the new
Teacher Cost Index (TCI)

October 2020

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Purpose of the Procedures Manual

The purpose of this document is to establish the New Mexico Public Education Department's (PED) procedures to be followed when calculating the Training and Experience and the new Teacher Cost Indices for a school district or charter school. Unless otherwise indicated, any and all references made to "district" apply to state and local charter schools. Questions concerning these procedures should be addressed to:

School Budget & Finance Analysis Bureau
Public Education Department
300 Don Gaspar
Santa Fe, New Mexico 87501
(505) 827-3860

State Statute Section 22-8-2 NMSA 1978
Definitions

22-8-2. Definitions.

As used in the Public School Finance Act:

N. "staffing cost multiplier" means:

- (1) for fiscal year 2019, the instructional staff training and experience index;
- (2) for fiscal year 2020, the weighted average of the instructional staff training and experience index at seventy-five percent and the teacher cost index at twenty-five percent;
- (3) for fiscal year 2021, the weighted average of the instructional staff training and experience index at fifty percent and the teacher cost index at fifty percent;
- (4) for fiscal year 2022, the weighted average of the instructional staff training and experience index at twenty-five percent and the teacher cost index at seventy-five percent; and
- (5) for fiscal year 2023 and subsequent fiscal years, the teacher cost index;

State Statute Section 22-8-24 NMSA 1978
Training and Experience Index

22-8-24. Instructional staff training and experience index; definitions; factors; calculations.

A. For the purpose of calculating the instructional staff training and experience index, the following definitions and limitations shall apply:

- (1) "instructional staff" means the personnel assigned to the instructional program of the school district, excluding principals, substitute teachers, instructional aides, secretaries and clerks;
- (2) the number of instructional staff to be counted in calculating the instructional staff training and experience index is the actual number of full-time equivalent instructional staff on the October payroll;
- (3) the number of years of experience to be used in calculating the instructional staff training and experience index is that number of years of experience allowed for salary increment purposes on the salary schedule of the school district; and
- (4) the academic degree and additional credit hours to be used in calculating the instructional staff training and experience index is the degree and additional semester

credit hours allowed for salary increment purposes on the salary schedule of the school district.

B. The factors for each classification of academic training by years of experience are provided in the following table:

Years of Experience					
	0-2	3-5	6-8	9-15	Over 15
Academic Classification					
Bachelor's Degree or less	.75	.90	1.00	1.05	1.05
Bachelor's Degree plus 15 credit hours	.80	.95	1.00	1.10	1.15
Master's Degree or Bachelor's Degree plus 45 credit hours	.85	1.00	1.05	1.15	1.20
Master's Degree plus 15 credit hours	.90	1.05	1.15	1.30	1.35
Post-Master's Degree or Master's Degree plus 45 credit hours	1.00	1.15	1.30	1.40	1.50

C. The instructional staff training and experience index for each school district shall be calculated in accordance with instructions issued by the state superintendent [secretary]. The following calculations shall be computed:

(1) multiply the number of full-time equivalent instructional staff in each academic classification by the numerical factor in the appropriate "years of experience" column provided in the table in Subsection B of this section;

(2) add the products calculated in Paragraph (1) of this subsection; and

(3) divide the total obtained in Paragraph (2) of this subsection by the total number of full-time equivalent instructional staff.

D. In the event that the result of the calculation of the training and experience index is 1.0 or less, the district's factor shall be no less than 1.0.

E. In the event that a new school district is created, the training and experience index for that district is 1.12.

State Statute Section 22-8-49 NMSA 1978
Teacher Cost Index; Licensure Experience Factor; Report

A. The teacher cost index for each school district or charter school shall be calculated in accordance with instructions issued by the department. The teacher cost index for a school district in its first year of operations is 1.0. The teacher cost index for a school district or charter school in its second or subsequent year of operations is the greater of 1.0 or the average of the licensure- experience factors of all full-time-equivalent teachers on the school district's or charter school's payroll in October of that year who are assigned classroom teaching responsibilities. The licensure-experience factor of a teacher corresponds to the teacher's licensure level and years of experience and is as follows:

Years of Experience					
	0-2	3-5	6-8	9-15	Over 15
Licensure Level					
Level 1	0.755	0.785	0.800	0.000	0.000
Level 2	0.000	0.994	1.023	1.050	1.123
Level 3	0.000	0.000	1.184	1.208	1.277

B. Beginning in 2021, the department, legislative education study committee staff and legislative finance committee staff shall jointly prepare and submit a report by November 1 of each year to the governor, the legislative education study committee and the legislative finance committee that includes:

- (1) data on the relationship of licensure-experience factors to actual teacher costs;
- (2) an analysis of the relationships among a teacher's licensure level, educational attainment, years of experience and salary; and
- (3) recommended changes, if any, to this section of the Public School Finance Act.

C. As used in this section:

- (1) "licensure level" is the teaching licensure level as defined in the School Personnel Act; and
- (2) "years of experience" is as defined by department rule.

State Statute 22-8-6.1 NMSA 1978
Charter School Budgets

- A. Each state-chartered charter school shall submit to the charter schools division of the department a school-based budget. The budget shall be submitted to the division for approval or amendment pursuant to the Public School Finance Act and the Charter Schools Act [Chapter 22, Article 8B NMSA 1978]. Thereafter, the budget shall be submitted to the public education commission for review.

- B. Each locally chartered charter school shall submit to the local school board a school-based budget for approval or amendment. The approval or amendment authority of the local school board relative to the charter school budget is limited to ensuring that sound fiscal practices are followed in the development of the budget and that the charter school budget is within the allotted resources. The local school board shall have no veto authority over individual line items within the charter school's proposed budget, but shall approve or disapprove the budget in its entirety. Upon final approval of the local budget by the local school board, the individual charter school budget shall be included separately in the budget submission to the department required pursuant to the Public School Finance Act and the Charter Schools Act.

- C. For its first year of operation, a charter school's budget shall be based on the projected number of program units generated by the school and its students using the at-risk index and the staffing cost multiplier of the school district in which the school is located, and the school's budget shall be adjusted using the qualified MEM on the first reporting date of the current school year. For its second and subsequent fiscal years of operation, a charter school's budget shall be based on the number of program units generated by the school and its students using the average of the MEM on the second and third reporting dates of the prior year, the at-risk index of the school district in which the school is located and the school's staffing cost multiplier.

**Summary of State Statute Section 22-10A-1 et seq. NMSA 1978
SCHOOL PERSONNEL ACT**

For a standard nine month contract all of the salary mandates below are currently in place for 2020-2021:

22-10A-7. Level One licensure.

G. The minimum salary for a level one teacher is forty thousand dollars (\$40,000)* for a standard nine and one-half month contract; provided that teachers in an extended learning time program or K-5 plus program shall receive additional salary at the same rate as their base salary for that teaching time.

*Though the School Personnel Act provides a minimum salary of \$40,000 for a level one licensed teacher, the *General Appropriation Act of 2020* provides for a minimum salary of \$41,000 and carries the weight of law.

22-10A-10. Level two licensure.

D. The minimum salary for a level two teacher is fifty thousand dollars (\$50,000) for a standard nine and one-half month contract; provided that teachers in an extended learning time program or K-5 plus program shall receive additional salary at the same rate as their base salary for that teaching time.

22-10A-11. Level three licensure; tracks for teachers.

C. The minimum salary for a level three-A teacher is sixty thousand dollars (\$60,000) for a standard nine and one-half month contract; provided that teachers in an extended learning time program or K-5 plus program shall receive additional salary at the same rate as their base salary for that teaching time.

D. The minimum salary for a counselor who holds a level three or three-A license as provided in the School Personnel Act and rules promulgated by the department shall be the same as provided for level three-A teachers pursuant to Subsection C of this section.

Note: At the discretion of the Governor and Legislature, through the General Appropriation Act, minimum salaries may change. In addition, alternative licensure tracks are required to meet the same minimum salary requirements per level. As of 2020-2021, the administrator minimum salaries (Level three-B) remain at \$60,000 times the applicable responsibility factor.

NEW MEXICO PUBLIC EDUCATION DEPARTMENT'S SUMMARY OF OTHER RELEVANT 2018 CHANGES TO THE STATE EQUALIZATION GUARANTEE FORMULA

During the 2018 Regular Session, the Legislature passed, and the Governor signed, a new law (HB 188) that substantially changes how the T&E index will be calculated and applied to districts' State Equalization Guarantee (SEG) calculations in fiscal year 2019-20 (FY20) and beyond. This section of the T&E manual seeks to clarify and explain the recent changes to state law.

With regard to the T&E index, the new law:

- Starting in FY19, begins a four-year phase out of the existing T&E index;
- Starting in FY20, begins a four-year phase-in of the new TCI;
- Uses a staffing cost multiplier in the bridge years, equal to:
 - The T&E multiplier for FY19;
 - A weighted average of 75% of the T&E and 25% of the TCI for FY20;
 - A weighted average of 50% of the T&E and 50% of the TCI for FY21;
 - A weighted average of 25% of the T&E and 75% of the TCI for FY22; and
 - The TCI for FY23 and beyond;
- Changes how program units are multiplied by the staffing cost multiplier, such that:
 - Beginning in FY20, the staffing cost multiplier (T&E/TCI blend) is no longer applied to special education, bilingual multicultural education, fine arts education, or elementary physical education units; and
 - Instead will only be applied early childhood (3Y/4Y DD, HDK, FDK) and basic education (1-12) units; and
- Institutes a temporary hold harmless provision, subject to yearly Legislative appropriation, that seeks to:
 - For FY20, provide an offset for the lesser of any reduction applicable to the act or the reduction in year-over-year program cost;
 - For FY21, provide an offset for the lesser of 75% of the reduction applicable to the act or 75% of the reduction in year-over-year program cost;
 - For FY22, provide an offset for the lesser of 50% of the reduction applicable to the act or 50% of the reduction in year-over-year program cost;
 - Reduce the hold harmless if, in any year, the appropriation for the hold harmless is insufficient to fully fund the hold harmless, reduces the hold harmless amount to the prorated share of the appropriation; and
 - Requires PED to provide information by February 1 of each year related to the sum (estimated amount) of supplemental hold harmless needed and

- Requires PED to jointly prepare with LFC and LESC to prepare and submit a report to the Governor, LFC and LESC by November 1 of each year a data analysis of the relationships between educational attainment, licensure level, years of experience and salary and recommends changes to this section of the Public School Act.

With regard to other provisions, the new law also:

- Modified the at-risk multiplier, which is multiplied times the three-year average total weight (of percentage of Title I children, percentage of English Learners and the mobility factor)
 - For FY21 and subsequent fiscal years to 0.3; and
- Made changes to other sections of the Public School Finance Act, including definitions.

With regard to items of clarification:

- Hold harmless, if needed, will be calculated net of the at-risk index increase;
- Data collection will need to be done for both indices in SharePoint during the phase-in; and
- Distributive properties of these changes may result in different year-over-year program cost and SEG calculations for school districts and charter schools.

NEW MEXICO PUBLIC EDUCATION DEPARTMENT
 PROCEDURES FOR THE CALCULATION OF THE
 TRAINING AND EXPERIENCE INDEX

I. Annual Reporting

School district and charter school personnel shall annually calculate and report the training and experience index to the office of the School Budget and Finance Analysis Bureau (Bureau), in the format prescribed by the Bureau. The calculations shall be based on the FTE (full-time equivalent) number of operational personnel in each designated job class from the selected October payroll.

II. Placement Requirements:

School district and charter school personnel shall list the FTE number of operational personnel in each designated job class from the October payroll using established FTE definitions.

Instructional Personnel Job Classification	FTE Number on October Payroll
1411 Teachers—Grades 1-12	_____
1412 Teachers—Special Education	_____
1413 Teachers—Early Childhood Ed.	_____
1414 Teachers—Preschool	_____
1415 Teachers—Vocational & Technical	_____
1416 Teachers—Other Instruction	_____
1422 Teachers—Special Ed. Gifted	_____
1211 Coordinators/Subj. Matter Spec.	_____
1212 Library/Media Specialists	_____
1214 Guidance Counselors/Social Workers	_____
1215 Registered Nurses	_____
1311 Diagnosticians	_____
1312 Speech Therapists	_____
1313 Occupational Therapists	_____
1314 Physical/Recreational Therapists	_____
1315 Psychologists/Counselors	_____
1316 Audiologists	_____
1317 Interpreters	_____
1318 Orient. & Mobility Specialists	_____
Other Eligible Staff: (Attach List)	_____

Instructional personnel are to be placed in the appropriate training and experience classification on the matrix based on the following:

- A. Include only operational personnel as defined in 22-8-24 (A) (1) NMSA 1978. Unless they have FTE coded to operational personnel job classes, do not count for training and experience

reporting purposes administrators or those personnel excluded under 22-8-24 (A) (1) NMSA 1978. Please include all operational personnel FTE from your selected October payroll. Contract days and contract hours funded from sources other than the Operational Fund shall not be included in calculation of the training and experience index. However, instructional personnel paid from Indian Set-Aside funds where the federal Impact Aid program (Fund 25147) shall be included in the calculation.

- B. Using the local or governing board/PED approved school district or charter school salary schedule and the October payroll, enter FTE personnel.
- C. For the training and experience reporting purposes, place employees according to the state's matrix even if the school district's or charter school's salary matrix does not coincide with the state's.
- D. Include licensed, non-degreed personnel under the "BA or less" category if paid from the school district's or charter school's salary schedule.
- E. Please place all licensed staff FTE with Operational Personnel job classifications, including those individuals holding alternative licenses. All licensed staff should be available in the PED School Licensure database or have a copy of a signed license certificate prior to assuming Operational Personnel duties, and therefore before being placed on the October payroll and state matrix. Placement is contingent upon either a screen shot of the Licensee's Existing License Screen within the new portal or an actual pdf copy of the current license is included in the instructional staff folder.
- F. For individuals who have a half year of experience, school district or charter school personnel may choose to round the years of experience up to the next year, provided the school district or charter school board policies recognize the full year of experience for salary purposes and a half-year of experience is defined by local board policies and procedures.
- G. For individuals with out-of-state, or out-of-district, years of experience, local school district or charter school board policies should clarify how much or little of this experience will be recognized for placement on the salary schedule and therefore on the T&E matrix.
- H. Please note that all T&E job class codes need to be uniquely identified within the teacher contract – in order to be eligible for T&E placement. The contract should also indicate the amount of work days that personnel are working in these job class codes and over a current school year as well as funding sources.

III. FTE Requirements

School district and charter school personnel should report FTE as 1.0 for full-time individuals in the position and in hundredths for part-time employees. A 1.0 FTE is determined by the length of contract and hours per day of the majority of personnel in a given personnel category paid from the school district's or charter school's salary schedule as adopted by the local or governing board of education. (For a discussion of contract hours and funding sources, see section II-A). To derive FTE for part-time employees, divide the amount of employed time by the amount of time normally required in a full-time assignment. The computation of FTE should be the same whether it is computed on time or on salary. The following examples illustrate various situations and the manner in which FTE is calculated:

Example 1

In many school districts and charter schools, licensed personnel have duties and assignments in various areas (i.e., teacher-principal, teacher-guidance, or teacher-librarian). A person may have an assignment as a principal for 2 hours of a 6 hour contract day and may teach 4 hours.

The teacher-principal is paid \$75,000, has a Master's degree, and has 10 years of teaching experience. According to the school district's or charter school's adopted salary schedule, the teaching position would pay \$70,400. The FTE should be computed as follows:

4/6 of time = 67% Teacher	.67 FTE	\$47,168
2/6 of time = 33% Principal	.33 FTE	\$27,832

$$100\% \text{ teacher salary} = \$70,400 \times 67\% = \$47,168$$

Total Contract	\$75,000
Less	\$47,168 = \$27,832

Example 2

A teacher's, librarian's, or counselor's regular contract is for 182 days at 7 hours per day. If the same employee is hired for a period of time in excess of the regular contract (1 additional hour per day)*, report the person as 1.14 FTE. To arrive at the percentage which is over the regular contract day, begin with the number of hours in the contract day as 100% and then figure the additional time as a percentage of the regular contract day. (For a definition of FTE, see the introductory paragraph of section III on page 10.)

Regular contract day	= 7 hours	=	100%
1 additional hour	= 1/7 day or	=	<u>+14%</u>
Total percentage			114%

*Increments for coaching or club activities, etc., are not to be included.

If the same individual's regular contract is for 182 days, but the person is on an extended contract of 190 days, report the person as 1.04. To arrive at the percentage which is over the regular contract, begin with the contract (182 days) as 100% and then figure the additional days as a percentage of the regular contract.

Regular contract	= 182 days	=	100%
8 additional days	= 8/182	=	<u>+ 4%</u>
Total percentage			104%

Example 3

In calculating FTE, only one person per position is to be included. For example, if a person resigns and is immediately replaced, count only the replacement. The guiding principle is to use the FTE of the person who is present on the day of the October payroll being submitted.

IV. Experience Requirements

A. School district and charter school personnel must enter FTEs on the state's training and

experience matrix in accordance with the experience recognized and paid for on the school district's or charter school's adopted salary schedule. Total years of experience attained by the individual may not be applicable if the school district's or charter school's salary schedule recognizes only a portion of the experience for salary purposes. Placement on the salary schedule for years of experience should be determined by school district or charter school local policies.

B. Reported experience must be related to instruction and must be in accordance with local or governing board policy and verified by use of an out-of-district/charter school experience year verification form (see example B - page 23), a verifiable, signed, and dated experience year letter, or an in-district contract.

1. If permitted by local or governing board policy, verified employment for trade and industry instructors may be counted as experience for training and experience purposes in their licensed or instructional area.

2. If permitted by local or governing board policy, verified employment for higher education instructors may be counted as experience for training and experience purposes in their licensed or instructional area.

3. If permitted by local or governing board policy, verified employment for support service personnel may be counted as experience for training and experience purposes in their licensed or instructional area. [Support personnel are coordinators/subject matter specialists (job class 1211), library/media specialists (job class 1212), guidance counselors and social workers (job class 1214), registered nurses (job class 1215), diagnosticians (job class 1311), speech therapists (job class 1312), occupational therapists (job class 1313), physical/recreational therapists (job class 1314), psychologists/counselors (job class 1315), audiologists (job class 1316), interpreters (job class 1317), orientation and mobility specialists (job class 1318)]

(Please note that all T&E job class codes need to be uniquely identified within the teacher contract – in order to be eligible for T&E placement. It should also indicate the amount of work days that personnel are working in these job class codes and over a current school year)

4. Military service should be counted only when verified as instructionally related.

C. "Related to instruction," as referenced in the Public Education Department's *Manual of Procedures for the Calculation of the Training and Experience Index*, should be defined as those experiences as a professional educator (including administrative and supervisory experience) and as licensed or certified professionals in a clinical or parallel setting.

D. School district superintendents and charter school representatives must notify the Public Education Department by October 1 of the year prior to reporting if additional out-of-district years of experience will be recognized for salary purposes.

E. All foreign job verification letters/forms must be accompanied by English translations where applicable.

V. Training Requirements

A. Training reported must be that which is in accordance with local or governing board policy and verified by official transcripts of an accredited university, college, or postsecondary institution.

B. Hours added to a university, college, or postsecondary institution's transcript for academic achievements such as attaining certain grades or for any other outstanding achievements are not to be reported for training and experience purposes.

C. For training and experience purposes, additional hours of credit are to be counted only after each academic degree is awarded and in accordance with local or governing board policies. Further, additional hours added after the completion of one degree do not carry over after the completion of another degree.

D. For training and experience purposes, education must be approved by local or governing board policy and fall within the following guidelines:

1. Undergraduate and graduate credit hours earned before the bachelor's degree is completed may not be counted (Granting institutions may choose to count these graduate hours as part of a graduate degree).

2. If permitted by local or governing board policy, all credit hours, either undergraduate or graduate, may be counted if earned after the bachelor's degree has been attained.

VI. Reporting Training and Experience

The School Budget and Finance Analysis Bureau will make available the method for calculating and reporting training and experience. Currently, this manual provides instructions on calculations and reporting is completed through an online data upload and collection.

NEW MEXICO PUBLIC EDUCATION DEPARTMENT

PROCEDURES FOR THE CALCULATION OF THE TEACHER COST INDEX

I. Annual Reporting

School district and charter school personnel shall annually calculate and report the teacher cost index to the office of the School Budget and Finance Analysis Bureau (Bureau), in the format prescribed by the Bureau. The calculations shall be based on the FTE (full-time equivalent) number of operational personnel in each designated job class from the selected October payroll.

II. Placement Requirements:

School district and charter school personnel shall list the FTE number of teachers in each designated job class from the October payroll using established FTE definitions.

Instructional Personnel Job Classification	FTE Number on October Payroll
1411 Teachers—Grades 1-12	_____
1412 Teachers—Special Education	_____
1413 Teachers—Early Childhood Ed.	_____
1414 Teachers—Preschool	_____
1415 Teachers—Vocational & Technical	_____
1416 Teachers—Other Instruction	_____
1422 Teachers—Special Ed. Gifted	_____

Teacher FTE's are to be placed in the appropriate license and experience classification on the matrix based on the following:

- A. Include only teacher job classes, with classroom teaching responsibilities, as required by 22-8-49 NMSA 1978. All teachers with a 14XX series job class should have classroom teaching responsibilities and should be included in the matrix. Unless they have partial FTE coded to classroom classes, do not count for licensure and experience reporting purposes administrators, support staff or other personnel that are not teachers with primary classroom instruction responsibilities (i.e., staff not coded to the 14XX series of job classes). This includes substitute teachers in the 16XX series of job classes. Please include all classroom teacher FTE's from your selected October payroll. Contract days and contract hours funded from sources other than the Operational Fund shall not be included in calculation of the training and experience index. However, instructional personnel paid from Indian Set-Aside funds where the federal Impact Aid program (Fund 25147) shall be included in the calculation.
- B. Using data that conforms to the local or governing board/PED approved school district or charter school salary schedule and the October payroll, enter FTE personnel.
- C. For the teacher cost reporting purposes, place employees according to the state's matrix even if the school district's or charter school's salary matrix does not coincide with the state's, or is

based upon factors unrelated to licensure level or years of experience.

- D. Include all licensed classroom teacher FTE, levels one through three, under the appropriate licensure level category if paid as a classroom teacher under the 14XX series of job classes per the school district's or charter school's salary schedule.
- E. Please place all licensed staff FTE with classroom teacher job classifications (14XX), including those individuals holding alternative licenses on the state's matrix. All licensed staff should be available in the PED School Licensure database or have a copy of a signed license certificate prior to assuming Operational Personnel duties, and therefore before being placed on the October payroll and state matrix. Placement is contingent upon either a copy of a signed license certificate indicating staff is licensed for the year in question or a copy of the PED AS400 I-series screenshot with appropriate date of screenshot is included in the instructional staff folder.
- F. Provisions in law require conformance with years of experience as defined by PED rule. Whereas there are no definitions for the term "years of experience" in the New Mexico Administrative Code as it pertains to teacher licensure, we will continue the long standing practice of defining "years of experience" in the same manner as the T&E index; that is at the local level according to local school district and charter school board policies (see below on "Experience requirements").
- G. For individuals who have a half year of experience, school district or charter school personnel may choose to round the years of experience up to the next year, provided the school district or charter school board policies recognize the full year of experience for salary purposes and a half-year of experience is defined by local board policies and procedures.
- H. For individuals with out-of-state, or out-of-district, years of experience, local school district or charter school board policies should clarify how much or little of this experience will be recognized for placement on the salary schedule and therefore on the TCI matrix.
- I. Please note that all TCI job class codes need to be uniquely identified within the teacher contract – in order to be eligible for TCI placement. The contract should also indicate the amount of work days that personnel are working in these job class codes and over a current school year as well as funding sources.

III. FTE Requirements

School district and charter school personnel should report FTE as 1.0 for full-time individuals in the position and in hundredths for part-time employees. A 1.0 FTE is determined by the length of contract and hours per day of the majority of personnel in a given personnel category paid from the school district's or charter school's salary schedule as adopted by the local or governing board of education. (For a discussion of contract hours and funding sources, see section II-A). To derive FTE for part-time employees, divide the amount of employed time by the amount of time normally required in a full-time assignment. The computation of FTE should be the same whether it is computed on time or on salary. The following examples illustrate various situations and the manner in which FTE is calculated:

Example 1

In many school districts and charter schools, licensed personnel have duties and assignments in

various areas (i.e., teacher-principal, teacher-guidance, or teacher-librarian). A person may have an assignment as a principal for 2 hours of a 6 hour contract day and may teach 4 hours.

The teacher-principal is paid \$75,000, has a Master's degree, and has 10 years of teaching experience. According to the school district's or charter school's adopted salary schedule, the teaching position would pay \$70,400. The FTE should be computed as follows:

4/6 of time = 67% Teacher	.67 FTE	\$47,168
2/6 of time = 33% Principal	.33 FTE	\$27,832

$$100\% \text{ teacher salary} = \$70,400 \times 67\% = \$47,168$$

Total Contract	\$75,000
Less	\$47,168 = \$27,832

Example 2

A teacher's regular contract is for 182 days at 7 hours per day. If the same employee is hired for a period of time in excess of the regular contract (1 additional hour per day)*, report the person as 1.14 FTE. To arrive at the percentage which is over the regular contract day, begin with the number of hours in the contract day as 100% and then figure the additional time as a percentage of the regular contract day. (For a definition of FTE, see the introductory paragraph of section III on page 10.)

Regular contract day	= 7 hours	=	100%
1 additional hour	= 1/7 day or	=	<u>+14%</u>
Total percentage			114%

*Increments for coaching or club activities, etc., are not to be included.

If the same individual's regular contract is for 182 days, but the person is on an extended contract of 190 days, report the person as 1.04. To arrive at the percentage which is over the regular contract, begin with the contract (182 days) as 100% and then figure the additional days as a percentage of the regular contract.

Regular contract	= 182 days	=	100%
8 additional days	= 8/182	=	<u>+ 4%</u>
Total percentage			104%

Example 3

In calculating FTE, only one person per position is to be included. For example, if a person resigns and is immediately replaced, count only the replacement. The guiding principle is to use the FTE of the person who is present on the day of the October payroll being submitted, and coded to the appropriate classroom teacher job class.

IV. Experience Requirements

A. School district and charter school personnel must enter FTE's on the state's teacher cost matrix in accordance with the experience recognized and paid for on the school district's or charter school's adopted salary schedule. Total years of experience attained by the individual may not be applicable if the school district's or charter school's salary schedule recognizes only a portion of the experience for salary purposes. Placement on the salary schedule for years of

experience should be determined by school district or charter school local policies.

B. Reported experience must be related to instruction and must be in accordance with local or governing board policy and verified by use of an out-of-district/charter school experience year verification form (see example B - page 23), a verifiable, signed, and dated experience year letter, or an in-district contract.

1. If permitted by local or governing board policy, verified employment for trade and industry instructors may be counted as experience for teacher cost purposes in their licensed instructional area.

2. If permitted by local or governing board policy, verified employment for other classroom instruction (including higher education) may be counted as experience for teacher cost purposes in their licensed instructional area.

3. Military service should be counted only when verified as instructionally related.

C. School district superintendents and charter school representatives must notify the Public Education Department by October 1 of the year prior to reporting if additional out-of-district years of experience will be recognized for salary purposes.

D. All foreign job verification letters/forms must be accompanied by English translations where applicable.

V. Licensure Requirements

A. Licensure levels reported must be that which is in accordance with PED's Licensure Bureau and verified by either a copy of a signed license certificate indicating staff is licensed for the year in question or a copy of the PED AS400 I-series screen shot with appropriate date of screenshot included.

B. Staff that is unlicensed cannot be placed on the matrix and should not be given classroom teaching responsibilities.

VI. Reporting the Teacher Cost Index

The School Budget and Finance Analysis Bureau will make available the method for calculating and reporting teacher licensure and experience. Currently, that is this manual and reporting is completed through an online data upload and collection (SharePoint).

Additional PED Requirements for Calculation of both the Training and Experience Index and the Teacher Cost Index

- LICENSURE:** For reporting purposes, a teacher must be licensed in order to be placed on the matrices in the calculation of the school district's or charter school's training and experience index for that year. A copy of a signed license certificate or PED AS400 I-series screen shot is needed to verify current licensure. **National Board Certifications from the National Board of Professional Teaching Standard is not proof of licensure.**
- COMPLETED VS. CONFERRED DEGREE:** For training and experience purposes, a degree which has been completed, but not yet conferred, may be counted only if the degree granting

institution verifies in writing that the degree requirements have been completed and that the degree will be conferred at a later date.

3. **COUNTING TWO M.A.s AS M.A. PLUS 45:** If an individual has two master's degrees, the second degree may not be counted as forty-five additional hours unless it actually comprises forty-five hours. In other words, only the actual number of hours constituting the second degree may be counted as hours in addition to the first master's degree.
4. **ADDITIONAL HOURS EARNED AS PART OF A DEGREE:** Hours earned by an individual while working toward a degree that are in excess of the actual number of hours needed for that degree may not be counted for training and experience purposes as additional ("plus") hours once the degree has been completed. For example, although any hours earned while an individual is working toward a master's degree may be counted as they are accumulated as hours additional to the bachelor's degree, once the individual has earned the master's degree, none of those hours earned beyond actual degree requirements may be counted as hours in addition to the master's degree—the master's degree becomes the new starting point.
5. **OFFICIAL TRANSCRIPT:** An official transcript is required as proof of the conferment of a degree or of the accumulation of additional hours beyond a degree. An official transcript is one issued by an accredited institution and embossed with an institutional seal or other means of official identification. Other certifications indicating a degree was awarded, including National Board certifications, are not evidence of conferment of degree or accumulation of hours beyond the degree.
6. **OCTOBER PAYROLL:** School districts and charter schools must use the same October payroll for reporting both training and experience (T&E) index and teacher cost index (TCI) information. FTE's by job class for both data entries in the staffing cost multiplier should remain the same across job classes that are included in both indices.
7. **ELECTRONIC RECORDKEEPING:** If school districts or charter schools choose to keep instructional staff folders electronically, they must be centrally located in one place on the school district's or charter school's hardware (e.g. complete and available in one folder of the school district or charter schools shared hard drive). Electronic files must conform to the format for instructional staff folders provided elsewhere in this manual and must contain all information independent of other areas of the school district or charter school electronic data storage.
8. **RELATIONSHIP OF THE APPROVED SCHOOL DISTRICT'S OR CHARTER SCHOOL'S SALARY SCHEDULE TO THE T&E/TCI MATRIX IN STATUTE:** Neither Section 22-8-24 NMSA 1978, nor Section 22-8-49 NMSA 1978 require that a district salary schedule correspond exactly to the statutory training and experience or teacher cost index matrices. School districts and charter schools are free to deviate from the matrix so long as they are not in violation of any other statutory confines, such as the requirement to maintain a minimum teacher salary. However, school districts and charter schools should be aware of the following:
 - a) For the purposes of the T&E matrix, although a school district's or charter school's salary schedule may compensate experience through groupings of years that differ from those specified by the training and experience matrix, it must reflect by means of an actual salary increase the divisions on the training and experience matrix in order for an individual to be placed in the higher cell for purposes of calculating the school district's or charter school's training and experience index. For example, if the salary schedule for a school district or charter

school indicates that there is no salary increase granted for movement from a bachelor's degree and five years' experience to a bachelor's degree and six years' experience, any individual with a bachelor's degree and six years' experience must be placed back in the same cell as those with a bachelor's degree and five years' experience for purposes of calculating the training and experience index for a school district or charter school. **There must be at least a one dollar increment in every cell on the salary schedule in order to move on the training and experience matrix.**

b) For the purposes of the T&E matrix, a school district or charter school may choose to recognize for salary purposes additional training categories, such as a master's degree plus thirty hours. Although the individual holding a master's degree plus thirty hours may make a higher salary than the individual holding a master's degree plus fifteen hours, that individual must be placed in the master's plus fifteen hours category for purposes of calculating the training and experience index for a school district or charter school.

c) When a school district or charter school freezes their salary schedule, the school district or charter school may not use the additional years of experience and/or training excluded from salary increments for the purposes of calculating the school district's or charter school's training and experience index. This provision also applies to a school district or charter school engaged in collective bargaining (1) that have not entered into an agreement by the time the training and experience index must be computed, (2) that are using the prior year's salary schedule, and (3) that have not allowed individuals to advance in terms of experience or training.

d) If local or governing board policy permits experience of less than one school year but more than half of a school year the experience may be rounded to one year so long as the experience was gained in one position in one span of time. For example, a series of unconnected experiences may not be combined. A school district or charter school that so rounds such experience must recognize the full year for salary increment purposes if it uses the full year for training and experience purposes.

e) For these reasons, most salary schedules will continue to conform to the format established by the training and experience index for the years of the teacher cost index phase-in. To be placed on the TCI matrix, salaries of staff must conform to the approved salary schedule.

9. **VERIFICATION OF INSTRUCTIONALLY-RELATED MILITARY EXPERIENCE:** Upon discharge from military service, individuals are provided with paperwork that includes a description of the duties to which they were assigned. If this official paperwork is insufficient to allow school district or charter school personnel and state auditors to determine whether or not the duties were instructionally related, further proof will be required of the employee before credit for such experience may be given. The employee is responsible for securing additional acceptable verification. Such additional verification may consist of official documents issued by the military or of written confirmation that includes a description of the instructionally-related duties performed and the signature of the employee's former commanding officer or authorized designee.
10. **INSTRUCTIONALLY-RELATED EXPERIENCE:** To qualify as instructionally-related experience the employee must either be in a position in which the primary job responsibility is the supervision and/ or provision of formal instruction or in a position as a licensed or certified professional in a clinical or parallel setting. The first type of instructionally-related experience ***includes, but is not limited to,*** experience as a classroom teacher in a public or private school or postsecondary institution; experience as a superintendent, director of instruction,

director of testing, director of special education, or principal in a public or private school; experience as a president, dean, or department head in a postsecondary institution; experience as a formal trainer in government, business, or industry; and experience in a verifiable instructional capacity in the military. The second type of instructionally-related experience ***includes, but is not limited to,*** experience as a registered nurse in a school, hospital, doctor's office, or clinical setting; and experience as an occupational or physical therapist (or any other ancillary service provider) in a school, hospital, doctor's office, or clinical setting. The above lists are illustrative, not exhaustive.

Instructional Staff Folder Formatting

I. Purpose

II. File Organization

A. Table of Contents

B. Cover Sheet Information—Verifiable Training

1. School of graduation
2. Date degree conferred
3. Type of degree
4. Training hours earned and schools attended

C. Cover Sheet Information—Verifiable Experience

1. Places of employment
2. Dates of employment (starting date to ending date)
3. Number of hours/days worked during the year

D. Cover Sheet Information—Verifiable Licensure

1. Licensure Number
2. Effective Dates of Certification (starting date to ending date)
3. Licensure Title (e.g. Level One Alternative, etc.)

E. Instructor Licensure Records

F. Administrative Training Records

G. Health Records

H. Evaluation Records

I. Miscellaneous Information

J. Personal and Confidential Records

III. File Folder Organization

I. Purpose

The intent of this packet is to inform and show your school district or charter school an effective organization of personnel files. The information that follows should help you accomplish two objectives:

- A. Organize the school district's or charter school's filing and record keeping management system, and
- B. Streamline the review process so that outside sources such as the PED auditors, and the instructors themselves can gather needed information that is reliable, complete, and easily accessible.

II. Personnel File Organization

A. Table of Contents

Each folder should include a table of contents page that lists the exact contents of the information on file. Such a page would help in the review process when only certain documents are required.

B. Cover Sheet Information—Verifiable Training

This cover sheet should include information pertaining to:

1. The school(s) from which the individual graduated,
2. The date(s) of degree conferment,
3. The type(s) of degree(s) earned, and
4. The training hours earned and schools attended as applicable to the school district's or charter school's policies established for purposes of movement on the salary schedule.

The information should be listed in chronological sequence. This will help in tracking the information. (See example A)

The transcripts received should be official and bear the embossed university seal.

C. Cover Sheet Information— Verifiable Experience

This cover sheet should include information pertaining to:

1. Places of employment,
2. Dates of employment (starting date to ending date), and
3. Number of hours/days worked for each year of employment.

The information should be verifiable and signed by the previous employer. A school district or charter school verification form will have to be developed by the school district or charter school for this purpose. (See example B).

Only experience applicable to the policies of the school district or charter school and allowable on the salary schedule will be shown here and listed in chronological sequence. All other experience will be placed in the miscellaneous section of the folder.

Just behind the cover sheet will be the actual verifiable documents pertaining to the cover sheet information. This documentation will be in the same chronological sequence for ease of comparison and verification.

D. Cover Sheet Information— Verifiable Licensure

This cover sheet should include quickly identifiable information pertaining to:

1. Licensure Number
2. Effective Dates of Certification (starting date to ending date)
3. Licensure Title

This information should be verifiable to a copy of a signed license certificate or PED AS400 I-series screen shot dated from the year of reporting. There is no need for a verification form if this is included. Just behind the cover sheet will be these actual instructor licensure records including verifiable documents pertaining to the cover sheet information.

E. Instructor Licensure Records

This section of the folder should include all licensure documents which pertain to the qualifications of the instructor, including the level, subjects and grade levels the instructor is eligible to teach. In addition, if the instructor is under a waiver agreement, that agreement must be filed within this section.

F. Administrative Training Records

This section of the folder should include all pertinent administrative training records.

G. Health Records

This section of the folder should include all pertinent health records and health information as required by the school district or charter school and must also include the results of the TB test.

H. Evaluation Records

This section of the folder should include those evaluations required in accordance with Chapter 22, Article 10A – School Personnel Act, NMSA 1978

I. Miscellaneous Information

This section of the folder could include any other important information which does not fit the other topics above.

J. Personal and Confidential Records

This section will include information which outside personnel should not access.

Note: It is important not to have duplicate information. This will only disorganize the filing system. All duplicated documents should be given to the instructor for his/her own personal files.

Calculating the Staff Cost Multiplier

After submittal of T&E and TCI information in the format and manner prescribed by the School Budget and Finance Analysis Bureau has been completed (i.e. according to this manual and uploaded through the web-based data collection). School Budget and Bureau staff will combine the appropriate weighting and will include a copy of the document in your membership file to be included in your estimated SEG calculations for the upcoming year. You will receive notification of your staffing cost multiplier, to include calculations after submittal.

EXAMPLE A

(YOUR SCHOOL DISTRICT/CHARTER SCHOOL NAME)

(Name of Employee)

(Social Security #)

TRAINING VERIFICATION

Bachelor's Degree (Institution): _____

Date Conferred: _____/_____/_____

Transcript Received: _____/_____/_____

Master's Degree (Institution): _____

Date Conferred: _____/_____/_____

Transcript Received: _____/_____/_____

Other Degree (Institution): _____

Date Conferred: _____/_____/_____

Transcript Received: _____/_____/_____

TRAINING HOURS GRANTED

Year	Institution	Course	Hours	Approved by

EXAMPLE B

(YOUR SCHOOL DISTRICT/CHARTER SCHOOL)

(ADDRESS)

(DATE OF SUBMITTAL)

(Name of Employee) has applied for employment in the (School District/Charter School).
Please complete this form for the years of experience earned in your district or organization.

VERIFICATION OF EXPERIENCE

School Year	School District/Charter School Organization	Position Held	No. Hrs./ Day	No. Days/ Year

Signature of Authorized Representative

Printed Name of Representative

District or Institution

City and State

Date Signed
