

**LINKING MONTGOMERY COUNTY PUBLIC
SCHOOLS WORKFORCE DATA TO
COUNCIL DECISION-MAKING**



OFFICE OF LEGISLATIVE OVERSIGHT
REPORT NUMBER 2007-7

April 10, 2007

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LINKING MONTGOMERY COUNTY PUBLIC SCHOOLS
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THE ASSIGNMENT

Each year, in response to the County Council's request for workforce data, Montgomery County Public Schools (MCPS) submits its Staff Statistical Profile (SSP). The SSP contains one to ten years of data on a range of workforce variables, including personnel demographics, staff experience, average salary, staff turnover, and retirement eligibility. The SSP provides data for the entire MCPS workforce and for selected positions, e.g., administrators, principals, teachers, and paraeducators.

The other County and bi-County agencies (County Government, Montgomery College, M-NCPPC, and WSSC) submit similar reports of workforce data to the Council. Together, these five sets of workforce data comprise the *Personnel Management Review*, which becomes part of the Council's annual budget review of the agencies' recommended compensation adjustments.

The purpose of this Office of Legislative Oversight (OLO) assignment is to assist the Council to make greater use of the workforce data that MCPS provides annually. Specifically, this project tasks OLO with becoming conversant with the data contained in MCPS' Staff Statistical Profile and recommending how the Council can use these data during budget worksessions and/or related oversight activities. In assigning this project, the Council indicated an expectation that OLO's recommendations with respect to MCPS' workforce data might apply to the workforce data submissions from all agencies.

STRATEGIC WORKFORCE PLANNING

The process known as "strategic workforce planning" offers a framework for understanding the potential uses of workforce data. While it primarily addresses the internal needs of agency managers to improve programming and outcomes, elected officials and others outside an agency can use the data generated by workforce planning to improve their understanding of management and funding decisions. The four steps of the workforce planning process and the data that each step generates are:

- Step 1:** Assess the current workforce by collecting and analyzing data on workforce demographics, skills and competencies, turnover, and salaries.
- Step 2:** Identify current and projected workforce gaps by generating data on current and projected workforce demand and supply by position, skill, and/or competency.
- Step 3:** Identify and implement strategies to narrow workforce gaps by generating data on the size and cost of workforce strategies and performance measures.
- Step 4:** Assess the effectiveness of strategies by comparing trends to targets and generating data on program efficacy, cost-effectiveness, and workforce goal attainment.

MCPS' INTERNAL USES OF WORKFORCE DATA

MCPS staff report using workforce data in a number of ways. Examples of MCPS' internal uses include:

- Monitoring progress on workforce diversity, recruitment, teacher qualifications, and turnover;
- Informing contract negotiations with bargaining units;
- Identifying job categories for mandatory training;
- Developing projections related to the Capital Improvements Program; and
- Tracking progress on Goal 4 of the MCPS Strategic Plan to "create a positive work environment in a self-renewing organization."

Findings from Staff Statistical Profile

MCPS' STAFF STATISTICAL PROFILE (SSP)

The Staff Statistical Profile presents a significant amount of data that can answer questions about the current MCPS workforce and its changes in recent years. The 2006 edition of the SSP includes over 70 tables and graphs that present data on MCPS' workforce overall, by bargaining unit, and by selected positions, e.g., administrators, principals, other professionals, teachers, and support services personnel. OLO sorted the contents of the Staff Statistical Profile into four data categories:

1. **Demographics** that describe trends in gender, race/ethnicity, age, and residency.
2. **Staff Qualifications** that track degrees, certifications, and years of experience by position.
3. **Turnover and Eligibility for Retirement** that describe the length of tenure by position, the rates and reasons for turnover, and eligibility for retirement within the next 5 to 25 years.
4. **Salaries** that describe salary schedule placement and average salaries by bargaining unit.

To enhance the usefulness of the data shared with the Council, OLO combined data from multiple tables, and calculated changes in number and percent where trend data were provided. Highlights of the information contained in the 2006 edition of the SSP follow.

DEMOGRAPHICS

- In FY06, MCPS had 21,277 employees - 73.9 percent were female and 26.1 percent were male.
- In FY06, the MCPS workforce was 67.6 percent White, 18.7 percent African American, 7.6 percent Hispanic, 5.7 percent Asian American, and 0.3 percent American Indian.
- Nearly three-quarters (73.7%) of MCPS staff live in Montgomery County. Eight percent of MCPS staff reside in Frederick County, six percent live in Prince George's County, and four percent reside in Howard County; only 4.2 percent live outside of the state.

Residency of MCPS Staff, FY06

Place of Residence	Percent
Montgomery County	73.7%
Frederick County	8.1%
Prince George's County	5.8%
Howard County	4.1%
Other Maryland Counties	4.1%
Other State/District of Columbia	4.2%
Total	100.0%

STAFF QUALIFICATIONS

- The percent of administrators and other professionals with at least a Master's degree or equivalent was relatively steady from FY03 to FY06, ranging between 95 to 99 percent.
- From FY03 to FY05, the percent of principals, assistant principals, and student support specialists with an Advanced Professional Certificate decreased from 92 to 90 percent.
- From FY03 to FY05, approximately 80 percent of all new teachers held a Standard or Advanced Professional Certificate.

Findings from Staff Statistical Profile

TURNOVER AND ELIGIBILITY FOR RETIREMENT

- Among administrators, eligibility for retirement varies by position. Nearly 55 percent of all principals can retire within the next 10 years compared to 31 percent of assistant principals.
- In FY05, total turnover was 8.6 percent for teachers and 8.9 percent for support services personnel. The same year, termination (both voluntary and involuntary) accounted for about 64 percent of total teacher turnover and about 60 percent of total support services turnover.
- Turnover among principals and assistant principals was 15 and 24 percent, respectively in FY05. Transfers and promotions accounted for most of the turnover for assistant principals while retirement was the primary reason for principals.

Table 16: Reasons for Turnover by Position, FY05

Position	Termination*	Retirement	Transfer/ Promotion	Total Turnover
Administrators	2.6%	4.9%	1.8%	9.4%
Principals	1.0%	7.3%	6.7%	15.0%
Assistant Principals	5.0%	2.5%	16.6%	24.1%
Student Support Specialists	0.0%	0.0%	59.4%	59.4%
Teachers	5.5%	2.2%	0.9%	8.6%
Support Services	5.4%	2.9%	0.6%	8.9%
Paraeducators	5.9%	2.2%	4.8%	13.0%

*Termination may be voluntary or involuntary.

SALARIES

- In FY06, 6.4 percent of MCPS' 11,209 teachers were at the start of their pay grade and 14.1 percent were at the top of their pay grade. In FY06, 56.1 percent of the 1,136 new teachers were hired at Step 1 of their respective pay grade.
- In FY06, the average FTE salary for administrators represented by MCAASP was \$105,720. For 12-month other professionals represented by MCEA, the average FTE salary was \$90,742, while for 10-month teachers it was \$64,852. For support services employees represented by SEIU, the average FTE salary was \$36,478.
- From FY03 to FY06, the average salary for all teachers increased 10.4 percent, from \$58,758 to \$64,841. During this time, the average salary for new teachers increased by 9.8 percent from \$42,791 to \$46,971.

Average Salaries for MCEA Positions, FY03-FY06

Position	FY03	FY04	FY05	FY06	FY03-FY06 Change	
					\$	%
Other Professionals	\$84,138	\$88,957	\$88,840	\$91,099	\$6,961	8.3%
Teachers	\$58,758	\$62,156	\$63,131	\$64,841	\$6,083	10.4%
New Teachers	\$42,791	\$42,044	\$45,839	\$46,971	\$4,180	9.8%

OLO Findings and Recommendations

FINDINGS:

OLO's review of MCPS' Staff Statistical Profile (SSP) and workforce planning literature generated three findings:

- **Finding #1: The Staff Statistical Profile provides important data about the MCPS workforce. However, the current format and contents of the SSP are not conducive to an efficient review.** The SSP offers considerable information on the size and characteristics of the MCPS workforce. However, the usefulness of the SSP to the Council is limited due to its length and absence of an executive summary.
- **Finding #2: The literature on strategic workforce planning suggests that benefits emerge from reviewing workforce data within the context of workforce performance targets.** The meaningful analysis of data on variables such as workforce skills and demographics requires information about what an organization is trying to accomplish. Elected officials and others outside an agency can use the workforce goals and performance data generated by workforce planning to improve their understanding of both management and funding decisions.
- **Finding #3: In its current form, the Staff Statistical Profile does not provide context for the Council to understand MCPS' progress on the agency's workforce goals or the cost-effectiveness of workforce strategies.** The Council has never asked MCPS or the other agencies to submit data on workforce targets or the impact of workforce strategies on workforce trends as part of the *Personnel Management Review*. However, as the Council considers requests for changes in staffing and compensation, understanding an agency's progress on its workforce goals can inform Council decision-making.

RECOMMENDATIONS:

OLO offers two recommendations for Council action on requests for and uses of MCPS workforce data:

- **Recommendation #1: Request that MCPS reorganize and provide explanatory text to the workforce data presented in future submissions to the Personnel Management Review.** With the goal of producing a more concise and useable document, the Council should request that MCPS reorganize and provide explanatory text in its future submissions of workforce data to the *Personnel Management Review*. OLO also recommends that the Council ask MCPS to provide some selected trend calculations, an executive summary that highlights "the news" contained in the workforce data, and a glossary of key terms.
- **Recommendation #2: Request that MCPS provide context for the Council's review of the workforce data submitted for inclusion in the Personnel Management Review.** In order to react to information about the MCPS workforce as "good" or "bad" news, the Council needs to understand how MCPS' current workforce compares to the school system's overall workforce needs, both now and in the future. As the Council considers the agency's annual budget requests, the Council should examine whether MCPS' proposals align with the agency's current and long term workforce goals.

OLO recommends that some of the performance targets already tracked by MCPS' Office of Human Resources' Family of Measures could provide some of the context needed for review of workforce data. The pairing of workforce trends to targets should facilitate the Council's understanding and practical use of MCPS workforce data in annual budget decision making and general oversight of the MCPS budget.

For a complete copy of OLO Report 2007-7, go to: www.montgomerycountymd.gov/olo

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Chapter I: Authority, Scope, and Organization

A. Authority

Council Resolution 15-1554, FY 2007 Work Program for Office of Legislative Oversight, adopted July 25, 2006.

B. Scope, Purpose, and Methodology

Scope and Purpose. Each year, Montgomery County Public Schools (MCPS) submits its Staff Statistical Profile (SSP) to the Council in response to the Council's request for workforce data. The other County and bi-County agencies (County Government, Montgomery College, M-NCPPC, and WSSC) submit similar reports of workforce data to the Council. Together, these five sets of workforce data comprise the *Personnel Management Review*, which becomes part of the Council's annual budget review of the agencies' recommended compensation adjustments.

In addition to sharing the SSP with the Council, MCPS uses the SSP internally to provide common workforce data to its own offices and divisions. In sum, the SSP contains one to ten years of data on a range of workforce variables, including: personnel demographics, staff experience, average salary, staff turnover, and retirement eligibility. The SSP provides data for the entire MCPS workforce as well as for selected positions, e.g., administrators, principals, assistant principals, teachers, and paraeducators.

The purpose of this Office of Legislative Oversight (OLO) assignment is to assist the Council to make greater use of the workforce data that MCPS provides annually. Specifically, this project tasks OLO with becoming conversant with the data contained in MCPS' Staff Statistical Profile and recommending how the Council can use these data during budget worksessions and/or related oversight activities. In assigning this project, the Council indicated an expectation that OLO's findings and recommendations with respect to MCPS' workforce data might apply to the workforce data submissions from the other County and bi-County agencies.

Methodology. This project was conducted by OLO staff members Elaine Bonner-Tompkins, Senior Legislative Analyst, and Jennifer Renkema, Research Associate, in February and March 2007. During this time, the April 2006 version of the MCPS Staff Statistical Profile (SSP) was the most recent one available. OLO understands that the 2007 edition of the SSP will be completed and submitted to the Council this month as part of the PMR and will largely replicate the 2006 version in terms of its content and presentation of data.

OLO's method for becoming conversant with MCPS' workforce data and providing recommendations on the Council on its use involved a combination of general research, document reviews, and interviews. Specifically, OLO:

- Spent time studying the workforce data provided in the Staff Statistical Profile (SSP) and other documents prepared by MCPS;

- Conducted general research and interviews to develop an understanding of how workforce data can inform the Council in the course of its annual budget decisions and general oversight of funding to MCPS; and
- Consulted with key MCPS staff including the Chief Financial Officer; the Associate Superintendent of Human Resources; and the Director of Management, Budget, and Planning on their use of workforce data to meet strategic goals.

C. Organization of Report

Chapter II, Background, provides an overview of “strategic workforce planning” and describes MCPS’ uses of workforce data in its strategic plan - *Our Call to Action: Pursuit of Excellence* - and the Office of Human Resources’ Family of Measures.

Chapter III, MCPS Workforce Data, describes the April 2006 edition of the Staff Statistical Profile and its data contents in four categories – (1) demographics; (2) staff qualifications; (3) turnover and retirement eligibility; and (4) salaries.

Chapter IV, Findings and Recommendations, outlines OLO’s findings, recommendations for Council action, and suggested questions for using workforce data to inform Council decision-making.

D. Acknowledgements

OLO received a high level of cooperation from everyone involved in this study. OLO thanks the following MCPS staff who worked with us during this study period:

- Mr. Larry Bowers, Chief Operating Officer;
- Ms. Susanne DeGraba, Chief Financial Officer;
- Ms. Susan Marks, Associate Superintendent for Human Resources;
- Dr. Marshall Spatz, Director, Office of Management, Budget, and Planning;
- Ms. Cheri Lavorgna, Supervisor, Technology and Reporting Systems, Employee and Retiree Service Center; and
- Ms. Nancy Sigler, Workforce Reporting Specialist, Employee and Retiree Service Center.

Chapter II: Background

This background chapter is divided into two parts:

- **Part A, Workforce Planning and Strategic Workforce Plans**, provides an introduction to “strategic workforce planning” and “strategic workforce plans,” based on a review of the literature.
- **Part B, MCPS’ Use of Workforce Data**, describes MCPS’ current uses of workforce data within the school system to support routine and strategic decision-making.

A. Workforce Planning and Strategic Workforce Plans

The workforce planning process offers a framework for understanding the potential uses of workforce data by different stakeholders. While it primarily addresses the internal needs of agency managers to improve programming and outcomes, elected officials and others outside the agency can use the data generated by workforce planning to improve their understanding of both management and funding decisions.

Public and private agencies often engage in workforce planning to ensure that they have “the right number of people with the right skills and experience in the right jobs at the right time”.¹ Workforce planning includes compiling and analyzing baseline personnel data and comparing it to projections for future staffing supply and demand. Comparing the existing workforce to workforce needs can help managers to first identify and then employ strategies to address workforce gaps.

Workforce planning can promote good management and responsiveness to the human resource needs of an organization. Rather than being an exact science, workforce planning provides:²

- A framework for making staffing decisions that are priority and mission driven;
- A means for aligning program priorities with resource and staffing needs;
- A connection between human resources and an organization’s strategic plan; and
- A tool to use when presenting agency budget requests.

The literature identifies three primary approaches to workforce planning:³

- The first approach compares the current workforce to the workforce needed in the future.
- The second approach focuses on the amount and type of work an organization anticipates handling at a specific point in the future, and uses this information to project the people and skills needed to perform that work.

¹ See presentation by South Carolina Workforce Plan - Budget and Control Board, Office of Human Resources, June 15, 2001 available at <http://www.ohr.sc.gov/OHR/wfplan/Workforce-Planning-Workshop.ppt>.

² Ibid - South Carolina Workforce Plan presentation.

³ Adapted from International Personnel Management Association’s *Workforce Planning Resource Guide*, 2002, available at http://www.ipma-hr.org/files/workforce_planning.pdf.

- The third approach identifies sets of competencies aligned with the organization’s mission, vision, and strategic goals. This approach assumes the organization has already considered workforce and workload and can focus not only on the number of people, but also on the competencies employees must master for organizational success.

Each workforce planning approach requires a four-step process for implementation. Table 1 lists each step and the workforce data that it generates. A description of the steps that occur at each stage of the workforce planning process follows.

Table 1: Workforce Planning Process and Data Generated

Four Steps of Workforce Planning		Generates data on:
Step 1:	Assess the current workforce	Workforce size and demographics, skills and competencies, turnover and salaries
Step 2:	Identify current and projected workforce gaps	Current and future workforce demand and supply by position, skill and/or competency
Step 3:	Identify and implement strategies designed to narrow the gap and develop performance measures of success	Number, size, scope, and cost of workforce strategies and performance measures of success
Step 4:	Assess the effectiveness of strategies by comparing trends to targets	Goals exceeded, met, and unmet; efficacy and cost-effectiveness of strategies implemented

The first step of workforce planning requires an assessment of the current workforce. Strategies toward this end can include:

- An environmental scan that reviews census data, local and state budget forecasts, and anticipated changes in laws or regulations;
- A review of an agency’s strategic plan to look for directions, goals, and priorities for workforce planning implementation;
- An analysis of workforce data such as projected retirement eligibility, staff diversity, and projected turnover; and
- An assessment of employee satisfaction that relies on employee surveys, exit interview data, and other sources of information to find out who leaves and who stays and why.

The second step of the workforce planning process focuses on identifying gaps and surpluses in staffing and skills. Program managers typically compare the results of supply and demand projections, identify critical need areas, and generate possible strategies.

The third step requires the selection of strategies that address identified needs:

- To address skill gaps, strategies focused on succession planning, recruitment and selection, customized training, career development, and salary flexibility may be implemented to enable the agency to develop a pool of people to fill key positions.

- For skill surpluses, retraining, reassignment, voluntary downshifting, voluntary separation, and reduction in force are strategies that might be used to improve the match between current skills and needed skills.
- To address retention and productivity issues, employee surveys, pay options, reward and recognition programs, and alternative work arrangements could be implemented to improve employee retention and productivity.

The last step of a strategic workforce plan offers an assessment of the effectiveness of agency workforce efforts and the extent to which it has “the right people at the right time.” This evaluative step generates data that can respond to the following questions:

- Were the identified workforce strategies implemented?
- Did the workforce strategies work?
- What workforce strategies worked best?
- What workforce strategies were most cost effective?

Program managers can use data generated by the fourth stage of the workforce planning process to assess and evaluate the efficacy of their efforts, and to adjust their future strategies accordingly. Elected officials and others can also use the evaluative data to better understand how effectively resources have been targeted to meet the agency’s strategic workforce plan, and to identify which programs merit additional funding based on program results.

B. MCPS’ Use of Workforce Data

This section describes MCPS’ use of workforce data to support routine decision-making and planning via its strategic plan, *Our Call to Action: Pursuit of Excellence*⁴, and the Office of Human Resources’ Family of Measures.

MCPS uses workforce data for a number of internal purposes. Examples include:

- The Office of Human Resources uses workforce data to consider demographics trends among employees and to monitor progress on diversity, recruitment, and retention;
- The Department of Association Relations uses workforce data in their contract negotiations;
- The Office for Organizational Development uses workforce data for planning purposes to identify job categories for mandatory training and respond to trends in turnover;
- The Division of Long Range Planning uses projected classroom and workforce needs to develop its projections related to the Capital Improvements Program;
- The Board of Education uses workforce data to understand factual information about MCPS, such as the size of its workforce, demographics, skill level, and costs in general.

⁴ *Our Call to Action: Pursuit of Excellence – Strategic Plan for Montgomery County Public Schools 2006-2011*. July 2006

Tracking progress on its strategic plan provides another example of MCPS' use of workforce data. Goal 4 of *Our Call to Action* (OCA) focuses on aligning MCPS' resources to "create a positive work environment in a self-renewing organization."

MCPS' strategic plan describes the implementation plan for Goal 4 in three parts.

1. OCA states that the implementation of activities to support Goal 4 will align with the following Board of Education Academic Priorities:
 - Organize and optimize resources for improved academic results;
 - Use student, staff, school, and system performance data to monitor and improve student achievement; and
 - Foster and sustain systems that support and improve employee effectiveness, in partnership with MCPS employee organizations.
2. OCA describes the milestones and data points that MCPS will monitor to determine their progress on Goal 4. Progress on these measures is tracked in the OCA Annual Report.

Milestone 1: All employees will be provided with high-quality professional development opportunities to promote individual and organizational effectiveness. Data are tracked for:

- Teacher Professional Growth System;
- Administrative and Supervisory Professional Growth System;
- Supporting Services Employee Professional Growth System; and
- Staff who receive high-quality professional development.

Milestone 2: Systems are in place to recruit, support, and retain highly qualified and diverse professional and support personnel. Data tracked include diversity in workforce, highly qualified teachers, and highly qualified paraeducators in Title I schools.

Milestone 3: Strategic plans exist and are aligned at all levels of the organization. Data are tracked for Baldrige implementation.

Milestone 4: The work environment promotes employee well-being, satisfaction, and positive morale. Data are tracked for staff surveys on school environment and staff surveys on office environment.

Milestone 5: MCPS recognizes staff efforts and achievement in pursuit of system goals and related priorities. Data tracked include employee recognition data.

3. OCA describes a number of strategies that MCPS implements to meet Goal 4. The majority of these strategies align with Milestone 1 to provide staff development to administrators, teachers, and support staff. The strategies described vary from employee orientation, trainings, and courses to individualized programs such as mentoring and performance evaluation. Many of the programs are designed and implemented by MCPS, but some involve partnerships with Montgomery College, bargaining units, and community groups.

Monitoring workforce performance measures tracked by the Office of the Chief Operating Officer provides another example of MCPS' strategic use of workforce data. The Office of the Chief Operating Officer (OCCO) uses a sophisticated system of measurement and reporting as part of its routine decision-making and ongoing management. During the past three years, the OCCO has developed a Family of Measures to monitor the performance of MCPS' business operations that include human resources. Data are collected by unit in four areas: organizational results, financial results, customer focus, and employee focus/workforce excellence.

Table 2 provides an excerpt of the workforce data that the Office of Human Resources includes in the OCCO Family of Measures. The performance measures selected closely align with workforce data included in the Staff Statistical Profile. The selected demographic, staff quality, and turnover measures align with enhancing organizational results while the salary measures selected align with improving financial results.

Table 2: Workforce Targets in Office of Human Resources Family of Measures

Objective	Performance Measure	Measurement Unit/Scale	Goal	Last Reported Level of Performance	Last Report Date
Demographics					
Recruit, hire, and retain a diverse workforce.	Administrator and Supervisory Diversity	% by race/ethnicity	Increase	36.9%	Oct. 2006
	Teacher Diversity	% by race/ethnicity	Increase	20.6%	Oct. 2006
	Supporting Services Diversity	% by race/ethnicity	Increase	48.4%	Oct. 2006
Staff Qualifications					
Recruit, hire, and retain a highly qualified workforce in a timely manner.	Qualified staff in all vacancies	% of new teacher positions filled on the opening day of school	Above 93%	83%	Aug. 2006
		% fill-rate of supporting services positions	Above 95%	96%	Dec. 2006
		% of newly hired teachers eligible for regular education certification	Above 75%	86%	July 2006
		% of newly hired teachers designated "highly qualified" in the core academic subject taught	Above 85%	81%	July 2006

Table 2: Workforce Targets in Office of Human Resources Family of Measures, Cont.

Objective	Performance Measure	Measurement Unit/Scale	Goal	Last Reported Level of Performance	Last Report Date
Staff Qualifications, Cont.					
Recruit, hire, and retain a highly qualified workforce in a timely manner.	Qualified staff in all vacancies	% of new (novice and experienced) teachers meeting evaluation standard	98%	95%	July 2006
		% teachers meeting evaluation standard	99%	99%	July 2006
The Office of Human Resources will ensure that the MCPS workforce is in compliance with federal, state, and local laws, policies, and regulations.	Adhere to all local/state/federal compliance requirements.	% of core academic subject classes taught by HQ teachers	100%	86%	July 2006
		% of HQ paraeducators at Title I schools	100%	100%	July 2006
Increase the number of teachers who are national board certified.	National Board Certified Teachers	# of teachers	240 (5% increase from FY06)	295	March 2007
Maintain a high percentage of new contract offers accepted.	Teacher Contract Acceptance Data	% of offers accepted	90%	93%	Aug. 2006
Turnover and Eligibility for Retirement					
Reduce turnover among employees.	Administrative and Supervisory Turnover	% turnover	7.1%	9.0%	Oct. 2006
	Teacher Turnover	% turnover	7.6%	7.8%	Oct. 2006
	Supporting Services Turnover	% turnover	7.7%	8.7%	Oct. 2006
Salaries					
System measures of financial and budgetary performance will demonstrate a high level of human resources productivity, efficiency, and effectiveness.	Average salary of newly hired regular teachers	Average salary of newly hired regular teachers	BA Step 4	BA Step 5.95	Oct. 2006
		Average salary of newly hired special education teachers	BA Step 6	BA Step 7.52	Oct. 2006
		Average salary of Master's-required teachers	MA Step 6	MA Step 5.20	Oct. 2006

Source: Family of Measures, Office of Human Resources, Revised April 4, 2007

Chapter III: MCPS Workforce Data

This chapter describes the April 2006 Staff Statistical Profile and other documents that contain MCPS workforce data. It summarizes the data included in these resources in two sections:

Section A, MCPS Staff Statistical Profile (SSP), describes the content of the SSP.

Section B, Synthesis of Staff Statistical Profile Data, summarizes the data included in the SSP in four categories: demographics, staff qualifications, turnover and retirement eligibility, and salaries. Each category write-up includes a description of the data referenced, summary data tables, sample questions of potential interest to the Council, and key findings.

A. MCPS Staff Statistical Profile

MCPS submits the Staff Statistical Profile (SSP) to the County Council annually during budget season as part of the *Personnel Management Review*. The SSP has over 70 tables and graphs with data describing the MCPS workforce overall and by the following positions:

- Administrators and Supervisory Positions
- Principals
- Assistant Principals
- Student Support Specialists
- Other Professionals (i.e., 12-Month Montgomery County Education Association Personnel)
- Teachers
- New Teachers
- Support Services Personnel (i.e., 10 and 12-month SEIU Local 500 Personnel)
- Paraeducators

Table 3 on the next page describes the contents of the SSP across these four data categories and the fiscal years for which data are provided:

Category 1 – Demographics describes trends in gender, race/ethnicity, age, and residency;

Category 2 - Staff Qualifications tracks degrees, certifications, and total years of experience by position;

Category 3 - Turnover and Eligibility for Retirement describes the length of tenure by position, the rates and reasons for turnover (e.g. termination or transfer), and eligibility for retirement within the next 5 to 25 years; and

Category 4 - Salaries describes salary schedule placement and average salaries by bargaining unit.

Table 3: Contents of the Staff Statistical Profile by Category

Table Title	Positions	Description	Data Collected
Category 1 - Demographics			
Demographic Profile	Entire workforce; administrators; principals; assistant principals; student support specialists; other professionals; new teachers (as of October 15 and as of June 30); teachers; all support services staff; paraeducators	Demographics by number and percent for gender, race, and age.	FY03-FY06
Gender by School Type	Teachers	Provides the number and percent of male and female teachers by school type and total.	FY03-FY06
Residence Profile	Entire workforce	Number and percent of employees by county (MD only), state, and bargaining unit.	FY06
Initial Appointments to Administrative Positions/ New Hire Demographic Profiles	Administrators, principals, assistant principals, student support specialists	Number and percent of new appointments/hires by external/internal candidate status, gender, and race/ethnicity.	FY06
Category 2 - Staff Qualifications			
Degree	Administrators, other professionals, new teachers, teachers, paraeducators	Number and percent by degree.	FY03-FY06
Certification Type	Principals, assistant principals, student support specialists, other professionals, new teachers, teachers	Total number each year with the number and percent who have Standard or Advanced Professional Certificates or another certificate or license, depending on the position.	FY03-FY06
Total Years of Experience	Administrators, principals, other professionals, new teachers, teachers, all support services	Total experience by number and percent. Experience may include teaching and administration.	FY03-FY06
Elementary School Title I Highly Qualified Competency	Paraeducators	Number and percent of Title I elementary school paraeducators by "highly qualified" and "not highly qualified" status.	FY04-FY06
Title I Competency	Paraeducators	Number and percent of Title I "highly qualified" and "not highly qualified" paraeducators by elementary school (lists 20 elementary schools).	FY06

Table 3: Contents of the Staff Statistical Profile by Category, Continued

Table Title	Positions	Description	Data Collected
Category 3 - Turnover and Eligibility for Retirement			
Retention of Teachers	Teachers	Number hired each year from FY94-FY05. Number and percent of terminations each year from FY94-FY05, disaggregated by year hired. Terminations do not include retirements.	FY94-FY05
Years of Experience in MCPS	Administrators, other professionals, teachers	Experience at MCPS in five-year increments by number and percent. Experience may include teaching and administration.	FY03-FY06
Years of Experience as an MCPS Principal	Principals	Experience as an MCPS principal in five-year increments by number and percent.	FY03-FY06
Turnover	Administrators, principals, assistant principals, support specialists, teachers, all support services, paraeducators	Total number of staff in the fall and the number and percent of staff who terminated, retired, or were transferred/promoted to a different position that year. Presents total turnover by number and percent.	FY02-FY05
Retirement Eligibility	Administrators, non school-based administrators, principals, assistant principals, student support specialists	Total number and percent eligible to retire from 2006-2035 in five-year increments.	FY06
Retirement Eligibility by Level	Administrators, principals, assistant principals	Total number in elementary, middle, high, and special schools and central offices with number and percent eligible to retire in the next five years.	FY06
Category 4 - Salaries			
FY 2006 Fact Sheet (as of 10/15/2005)	Executive Staff, Administrative and Supervisory, Others Professionals, Teachers, and Support Staff	Number of employees and average salary by head count; number of positions and average salary by FTE.	FY06
Salary Schedule Placement	Administrators, other professionals, new teachers, teachers, all support services	Number and percent by pay grade and intermediate step.	FY06
Annual Salary FY2006	Other professionals, new teachers, teachers	Number and percent by annual salary in \$5,000 intervals.	FY06
Average Salaries	Other professionals, new teachers, teachers	Average salary.	FY06

B. Synthesis of Staff Statistical Profile Data

The SSP presents a significant amount of data that can be used to answer questions about the current MCPS workforce and how it has changed in recent years. This section synthesizes the SSP data into four categories: demographics, staff qualifications, turnover and retirement eligibility, and salaries.

Each category write-up includes summary data tables, sample questions of potential interest to the Council, and key findings. The chart below lists the tables described by category subsection.

Table	Title	Page
Category 1 - Demographics		
Table 5	MCPS Workforce Demographic Profile, FY03-FY06	14
Table 6	MCPS Demographic Profile by Administrative Position and Total Workforce, FY06	15
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Category 2 - Staff Qualifications		
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Table 11	Number of Employees and Type of Certification by Position, FY03-FY06	19
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Table 15	Turnover Rate by Position, FY02-FY05	23
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Category 4 - Salaries		
Table 18	Salary Schedule Placement for Teachers, FY06	25
Table 19	Average FY06 Salaries by Employee Group	26
Table 20	Average Salaries for MCEA Positions, FY03-FY06	27

OLO combined data from multiple tables in the SSP to enhance the usefulness of the data shared with the Council. The full SSP contains more detailed data on several of the measures. Additionally, OLO calculated changes in number and percent where trend data was available. These calculations are not included in the SSP. Definitions of key terms referenced in the SSP follow on Table 4 on the next page.

Table 4: Definitions of Key Terms Used in the Staff Statistical Profile

Term	Definition
Administrators	Includes both school based (e.g., principals, assistant principals, and student support specialists) and non-school based administrative and supervisory personnel. These employees are represented by the Montgomery County Association of Administrative and Supervisory Personnel (MCAASP)
School-based Administrators	Includes principals, assistant principals, and student support specialists.
Student Support Specialists	Employees participating in a four year time-limited training program. Participants either become assistant principals or return to the classroom.
Other Professionals	Includes Instructional Specialists, Pupil Personnel Workers, Social Workers, and Psychologists. These employees are represented by the Montgomery County Education Association (MCEA).
Paraeducators	Includes Special Education Itinerant, Special Education, 10- & 12-month Regular, Head Start, JROTC, Computer Lab, and Instructional Data Assistant Paraeducators. These employees are represented by the Service Employee International Union Local 500 (SEIU).
Head Count	Counts all employees without regard to whether the position is full or part time.
Full Time Equivalent (FTE)	Calculates the number of fulltime employees by aggregating full and part time positions. (i.e., 1 full time + .5 part time = 1.5 FTE)
MCPS Bargaining Units	MCAASP: Montgomery County Association of Administrative and Supervisory Personnel MCEA: Montgomery County Education Association SEIU: Service Employees International Union Local 500

Sources: SSP and conversations with MCPS staff.

In reviewing the SSP data, OLO found slight variations in the number of staff reported by position within the same fiscal year. For example, data on principal experience reports 191 principals in FY05, while data on principal turnover reports 193 principals for the same fiscal year. This variation may occur due to differences in data collection dates.

Category 1 - Demographics

This subsection synthesizes the workforce demographic trends tracked in the SSP by:

- a. Demographic Profiles of the MCPS Workforce
- b. Residency of MCPS Workforce
- c. Internal and External Hires for School-Based Administrative Positions

a. Demographic Profiles of the MCPS Workforce

Table 5: MCPS Workforce Demographic Profile, FY03-FY06

	FY03	FY04	FY05	FY06	FY04-FY06 Change*
Total Number	19,951	20,303	20,785	21,277	974
Gender					
Male	26.3%	26.2%	26.2%	26.1%	-0.1%
Female	73.7%	73.8%	73.8%	73.9%	0.1%
Race					
White	70.1%	69.3%	68.2%	67.6%	-1.7%
African-American	18.4%	18.6%	18.8%	18.7%	0.1%
Asian-American	4.6%	4.9%	5.3%	5.7%	0.8%
American Indian	0.3%	0.3%	0.4%	0.3%	0.0%
Hispanic	6.5%	6.8%	7.3%	7.6%	0.8%
Age					
Under 20	0.1%	0.1%	0.1%	0.0%	-0.1%
20-29 years	13.4%	14.1%	14.2%	14.5%	0.4%
30-39 years	20.5%	20.6%	20.9%	20.8%	0.2%
40-49 years	27.1%	26.9%	26.1%	25.7%	-1.2%
50-59 years	31.0%	30.4%	30.4%	30.2%	-0.2%
60+ years	7.9%	7.8%	8.3%	8.8%	1.0%

*Due to inconsistent data collection dates between FY03 and FY04, trends track FY04-FY06.

Source: Personnel Management Review, April 2006 (PMR) © A213

What have been the trends in the demographics of the MCPS workforce in recent years?

- The MCPS workforce grew from 20,303 to 21,277 employees (4.9%) from FY04 to FY06.
- As a percent of the workforce, Whites decreased from 69.3 percent in FY04 to 67.6 percent in FY06, or by 1.7 percentage points. The percent of MCPS staff aged 60 or older increased from 7.8 percent of all employees in FY04 to 8.8 percent in FY06.

Table 6 provides workforce data for administrative positions and Table 5 provides this data for other professionals, teachers, support services staff, and paraeducators.

Table 6: MCPS Demographic Profile by Administrative Position and Total Workforce, FY06

	Administrators*	Principals	Assistant Principals	Student Support Specialists	Workforce
Total Number	685	193	218	32	21,277
Gender					
Male	39.3%	36.8%	41.3%	46.9%	26.1%
Female	60.7%	63.2%	58.7%	53.1%	73.9%
Race/Ethnicity					
White	63.9%	66.8%	52.3%	53.1%	67.6%
African American	30.1%	27.5%	42.2%	31.3%	18.7%
Asian American	2.3%	2.1%	1.4%	6.3%	5.7%
American Indian	0.3%	0.5%	0.0%	6.3%	0.3%
Hispanic	3.4%	3.1%	4.1%	3.1%	7.6%
Age					
50+	52.7%	61.1%	36.3%	25.0%	39.0%

*Includes principals, assistant principals, student support specialists, and other staff represented by MCAASP.

Source: PMR © A217, A229, A239, A246, A213

Table 7: MCPS Demographic Profile by Non-Administrative Position and Total Workforce, FY06

	Other Professionals	Teachers	Support Services*	Para-educators	Workforce
Total Number	440	11,209	8,942	2,374	21,277
Gender					
Male	17.7%	20.0%	33.2%	10.6%	26.1%
Female	82.3%	80.0%	66.8%	89.4%	73.9%
Race/Ethnicity					
White	72.5%	79.6%	52.7%	65.6%	67.6%
African American	18.0%	12.3%	25.9%	16.2%	18.7%
Asian American	2.7%	4.0%	8.4%	6.1%	5.7%
American Indian	0.2%	0.2%	0.4%	0.5%	0.3%
Hispanic	6.6%	3.9%	12.6%	11.6%	7.6%
Age					
50+	54.8%	31.6%	46.4%	—	39.0%

*Includes paraeducators and other staff represented by SEIU.

Source: PMR © A252, A268, A278, A282, A213

What is the demographic profile of the MCPS workforce overall and by position?

- In FY06, MCPS had 21,277 employees by head count. Of these, 73.9 percent were female, and 26.1 percent were male.
- Over two-thirds of MCPS' workforce (67.6%) were White in FY06, while 18.7 percent were African American and the remaining 13.6 percent were Asian American, American Indian, and Hispanic. 39.0 percent of the MCPS workforce was at least 50 years old.
- In FY06, 79.6 percent of teachers were White, 12.3 percent were African American, and 8.1 percent were Asian American, American Indian, or Hispanic. Nearly one-third (31.6%) of teachers were at least 50 years old.

b. Residency of the MCPS Workforce

Table 8: Residency of MCPS Staff, FY06

Place of Residence	Percent
Montgomery County	73.7%
Frederick County	8.1%
Prince George's County	5.8%
Howard County	4.1%
Other Maryland Counties	4.1%
Other State*/District of Columbia	4.2%
Total	100.0%

*May include staff who have not completed a change of address.

Source: PMR © A214

Where do MCPS staff members reside?

- Nearly three-quarters (73.7%) of MCPS staff live in Montgomery County.
- Eight percent of MCPS staff reside in Frederick County, six percent live in Prince George's County, and four percent reside in Howard County.
- Only 4.2 percent of MCPS employees live outside of the State of Maryland in Virginia, Washington, D.C., West Virginia, Pennsylvania, or another state.

c. Internal and External Hires for School-Based Administrative Positions

Table 9: Internal and External Hires for School-Based Administrative Positions, FY06

Position	External Hires	Internal Hires	Total	% Internal Hires
New Principals	5	22	27	81.5%
New Assistant Principals	3	60	63	95.2%
New Student Support Specialists	1	15	16	93.8%
Total	9	97	106	91.5%

Source: PMR © A235, A242, A248

How frequently does MCPS hire internally for school-based administrative positions?

- In FY06, MCPS hired 106 new principals, assistant principals, and student support specialists. Of these, 97, or 91.5 percent, were internal candidates.
- The rate of internal hires varies by administrative position, with the percent of internal hires being higher for new assistant principals and student support specialists at 94 to 95 percent compared to 82 percent for new principals.

Category 2 - Staff Qualifications

This subsection addresses questions of staff qualifications, including degree, type of certification, and years of experience. Data are presented for:

- a. Degree by Position
- b. Type of Certification by Positions
- c. Years of Experience by Position

a. Degree by Position

Table 10 describes the highest degree attained by position from FY03 to FY06.

Table 10: Degree by Position, FY03-FY06

	FY03	FY04	FY05	FY06	FY04-FY06 Change*
Administrators					
Bachelor's	4.8%	4.6%	4.7%	4.7%	0.1%
Master's and Above	94.8%	95.0%	94.9%	94.9%	-0.1%
Other Professionals					
Bachelor's	1.7%	1.5%	2.1%	2.0%	0.5%
Master's and Above	98.3%	98.5%	97.9%	98.0%	-0.5%
Teachers					
Bachelor's	19.5%	20.0%	19.0%	18.8%	-0.2%
Master's and Above	80.4%	79.9%	80.9%	81.1%	0.2%
New Teachers					
Bachelor's	46.2%	43.0%	42.0%	43.8%	0.8%
Master's and Above	53.8%	57.0%	57.9%	56.2%	-0.8%
Paraeducators					
Bachelor's	29.7%	30.6%	31.6%	34.4%	3.8%
Master's and Above	6.0%	6.1%	6.3%	5.9%	-0.2%

*Due to inconsistent data collection dates between FY03 and FY04 for teachers and paraeducators, trends track FY04-FY06.

Source: PMR © A218, A253, A270, A261, A283

What are the trends in degrees held by MCPS staff?

- The percent of administrators and other professionals with at least a Master's degree or equivalent has been relatively steady from FY04 to FY06, ranging from 94.9 percent to 98.5 percent.
- The group most likely to hold a Bachelor's degree is "new teachers." In FY06, 43.8 percent of new teachers held a Bachelor's degree compared with 18.8 percent of all teachers and 34.4 percent of paraeducators.

b. Type of Certification by Position

Table 11: Number of Employees and Type of Certification by Position,* FY03-FY06

	FY03	FY04	FY05	FY06	FY03-FY05 Change
Principals, Assistant Principals, and Student Support Specialists					
Number of Employees	406	413	421	443	15
Standard Professional Certificate	8.4%	9.7%	10.2%	9.3%	1.8%
Advanced Professional Certificate	91.6%	90.3%	89.8%	90.7%	-1.8%
Other Professionals					
Number of Employees	411	396	422	—	11
Standard Professional Certificate	9.0%	9.6%	11.8%	—	2.8%
Advanced Professional Certificate	81.5%	79.5%	78.0%	—	-3.5%
Teachers					
Number of Employees	10,632	10,731	10,841	—	209
Standard Professional Certificate	40.4%	35.8%	37.2%	—	-3.2%
Advanced Professional Certificate	52.8%	58.4%	56.6%	—	3.8%
New Teachers					
Number of Employees	1,086	940	1,079	—	-7
Standard Professional Certificate	60.7%	57.2%	59.5%	—	-1.2%
Advanced Professional Certificate	19.8%	16.1%	18.6%	—	-1.2%
Title I Paraeducators					
Number of Employees	—	190	175	202	—
Highly Qualified	—	80.5%	85.1%	96.0%	—
Not Highly Qualified	—	19.5%	14.9%	4.0%	—

*Percent may not equal 100 due to other possible certifications or unknown certification.

Source: PMR © A233, A240, A247, A254, A275, A264, A285

What types of certification are held by MCPS school-based administrators?

- From FY03 to FY05, the percent of principals, assistant principals, and student support specialists with an Advanced Professional Certificate decreased by 1.8 percentage points, from 91.6 percent to 89.8 percent. However, in FY06 the percent increased to 90.7.

What percent of new teachers held Standard or Advanced Professional Certificates?

- From FY03 to FY05, about 80 percent of all new teachers held a Standard or Advanced Professional Certificate.

What percent of Elementary School Title I paraeducators are highly qualified?

- The percent of highly qualified paraeducators in Title I schools increased from 80.5 percent to 96.0 percent from FY04 to FY06.

c. Years of Experience by Position

Table 12: Years of Experience by Position,* FY03-FY06

	FY03	FY04	FY05	FY06	FY03-FY06 Change
Administrators**					
Total Number	619	625	642	685	66
0.1-5.0 years	3.4%	3.0%	2.8%	3.6%	0.2%
25.1+ years	50.5%	49.9%	47.9%	43.8%	-6.7%
Principals**					
Total Number	188	190	191	193	5
0.1-5.0 years	0.0%	0.0%	0.0%	0.0%	0.0%
25.1+ years	65.9%	63.2%	59.2%	54.0%	-11.9%
Other Professionals**					
Total Number	411	398	428	440	29
0.1-5.0 years	5.4%	4.5%	5.4%	5.7%	0.3%
25.1+ years	37.2%	41.0%	40.2%	39.3%	2.1%
Teachers**					
Total Number	10,632	10,804	10,974	11,209	577
0.1-5.0 years	29.1%	26.4%	25.8%	25.5%	-3.6%
25.1+ years	17.3%	17.5%	16.6%	16.3%	-1.0%
New Teachers**					
Total Number	984	777	960	1,136	152
0.1-5.0 years	73.3%	78.8%	74.4%	74.6%	1.3%
25.1+ years	0.5%	0.8%	1.3%	1.0%	0.5%
Support Services					
Total Number	8,289	8,476	8,742	8,942	653
0.1-5.0 years	33.9%	35.2%	35.3%	35.4%	1.5%
25.1+ years	11.1%	10.9%	11.0%	10.8%	-0.3%

*Includes years worked at MCPS or another agency.

**Distinct years of experience for teaching or administration are not available.

Source: PMR © A220, A232, A256, A272, A264, A280

How much experience do MCPS staff members have?

- In FY06, 54 percent of principals had more than 25 years of experience.
- Experience levels varied by groups. In FY06, new teachers were the most likely to have five years or less of experience at 74.6 percent followed by support services staff at 35.4 percent, and teachers overall at 25.5 percent.

Category 3 - Turnover and Eligibility for Retirement

Subsection 3 provides an overview of turnover and retirement eligibility data for the MCPS workforce by:

- a. Years of MCPS Experience by Position
- b. Termination of New Teachers
- c. Turnover Data by Position
- d. Administrator Eligibility to Retire

a. Years of MCPS Experience by Position

Table 13 describes total years of MCPS professional experience for three positions from FY03 to FY06 as a proxy of staff retention. While this data is provided in five year increments from 0.1 to more than 40.1 years in the Staff Statistical Profile, it is summarized in two categories below: those with less than 10 years of experience with MCPS and those with more.

Table 13: Years of Experience in MCPS by Position,* FY03-FY06

Position	FY03	FY04	FY05	FY06	FY03 – FY06 Change
Administrators - MCAASP					
0.1-10 years	38.1%	39.5%	39.3%	41.3%	3.2%
10.1+ years	61.9%	60.5%	60.7%	58.7%	-3.2%
Other Professionals – 12-month MCEA					
0.1-10 years	38.7%	36.9%	40.0%	41.8%	3.1%
10.1+ years	61.3%	63.1%	60.0%	58.2%	-3.1%
Teachers – 10-month MCEA					
0.1-10 years	61.9%	61.7%	62.4%	63.3%	1.4%
10.1+ years	38.1%	38.3%	37.6%	36.7%	-1.4%

*Includes prior and continuous employment adjusted for long-term leave. Distinct years of experience for teaching or administration are not available.

Source: PMR © A219, A255, A271

How much experience do MCAASP- and MCEA-represented employees have in MCPS?

- In FY06, 58.7 percent of administrators and 58.2 percent of other professionals had more than ten years of experience at MCPS. Fewer teachers (36.7%) had over 10 years of experience in the school system.
- From FY03-FY06, the percent of administrators, other professionals, and teachers with over ten years of experience at MCPS has decreased. From FY03 to FY06, the percent of administrators dropped by 3.2 percentage points, other professionals by 3.1 percentage points, and teachers by 1.4 percentage points.

b. Termination of New Teachers

Table 14 describes the annual and cumulative termination rate for new teachers hired between FY94 and FY05. Termination reflects teachers who leave voluntarily or involuntarily but does not include retirement. The table also includes the total number of teachers hired annually.

Table 14: Termination of New Teachers, FY94-FY05

Hire Date	Number Hired	Percent of Cohort Terminating by Fiscal Year												Total
		94	95	96	97	98	99	00	01	02	03	04	05*	
FY94	594	5.9	5.6	5.1	4.4	4.9	4.4	3.0	2.2	3.0	2.2	2.2	1.9	44.6
FY95	657		4.6	4.0	5.8	3.7	3.5	4.4	5.5	4.9	2.4	2.3	1.4	42.3
FY96	557			6.3	7.9	7.7	4.8	3.6	3.2	2.7	3.1	3.8	1.8	44.9
FY97	667				6.7	7.9	6.1	5.5	5.1	6.0	3.4	4.0	2.7	47.7
FY98	816					6.7	7.1	7.1	3.4	5.4	3.3	3.4	2.2	38.7
FY99	1,221						9.7	7.9	3.0	3.9	3.7	3.6	3.4	35.4
FY00	1,241							11.6	6.4	7.4	4.5	5.2	3.2	38.4
FY01	1,258								9.1	8.9	7.1	6.4	5.7	37.2
FY02	1,275									12.5	7.8	6.6	5.7	32.7
FY03	1,094										12.1	7.6	8.3	28.0
FY04	945											9.8	11.7	21.6
FY05	1,117												9.2	9.2
Totals	11,442													33.5

*Data through October 15, 2005

Source: PMR © A267

What is MCPS' termination rate for new teachers? What was the trend from FY94-FY05?

- Of 11,442 teachers hired from FY94 to FY05, 33.5 percent had terminated employment with MCPS by October 15, 2005.
- The rate of termination for new teachers after one year increased from 6.7 percent in FY98 to 9.7 percent in FY99. The number of new hires increased by 50 percent, from 816 to 1,221, during the same time frame.

c. Turnover Data by Position

Tables 15 and 16 describe trends in turnover rate by position between FY02 and FY05 as well as reasons for turnover by position for FY05.

Table 15: Turnover Rate by Position, FY02-FY05

	FY02	FY03	FY04	FY05	FY02-FY05 Change
Administrators	12.6%	9.8%	8.4%	9.4%	-3.2%
Principals	16.1%	15.5%	10.4%	15.0%	-1.1%
Assistant Principals	25.9%	18.1%	21.8%	24.1%	-1.8%
Student Support Specialists	40.6%	52.9%	63.6%	59.4%	18.8%
Teachers	8.8%	7.3%	8.9%	8.6%	-0.2%
Support Services	8.7%	7.7%	8.1%	8.9%	0.2%
Paraeducators	12.4%	11.3%	10.9%	13.0%	0.6%

Source: PMR © A221, A234, A241, A249, A267, A281, A287

Table 16: Reasons for Turnover by Position, FY05

Position	Termination*	Retirement	Transfer/ Promotion	Total Turnover
Administrators	2.6%	4.9%	1.8%	9.4%
Principals	1.0%	7.3%	6.7%	15.0%
Assistant Principals	5.0%	2.5%	16.6%	24.1%
Student Support Specialists	0.0%	0.0%	59.4%	59.4%
Teachers	5.5%	2.2%	0.9%	8.6%
Support Services	5.4%	2.9%	0.6%	8.9%
Paraeducators	5.9%	2.2%	4.8%	13.0%

*Termination may be voluntary or involuntary.

Source: PMR © A221, A234, A241, A249, A267, A281, A287

What is the turnover rate for selected MCPS positions? What are the reasons for turnover?

- Turnover among teachers and support services staff was similar from FY02 to FY05, averaging 8.4 percent for both groups. In FY05, total turnover was 8.6 percent for teachers and 8.9 percent for support services. The same year, voluntary and involuntary termination accounted for about 64 percent of total teacher turnover and about 60 percent of total support services turnover.
- In FY05, turnover for principals and assistant principals was 15 and 24 percent, respectively. For assistant principals, transfers and promotions accounted for most of their turnover compared to retirement as a primary reason for principals. Turnover rates for student support specialists at 59.4% in FY05 were high by design as employees in this position either return to their classrooms or become assistant principals within four years.

d. Administrator Eligibility to Retire

Table 17 provides FY06 data on the number of administrators by type and the percents eligible to retire between 2006 and 2035.

Table 17: Administrators Eligible to Retire between FY06-FY35

	Administrators	Principals	Assistant Principals	Student Support Specialists
FY06 Total Number	579	170	192	27
Percent Eligible to Retire by Years				
2006-2010	23.5	30.0	15.1	14.8
2011-2015	22.5	24.7	16.1	11.1
2016-2020	17.1	18.2	13.5	3.7
2021-2025	13.6	14.1	16.1	11.1
2026-2030	15.9	11.2	27.1	44.4
2031-2035	7.4	1.8	12.0	14.8

*Old Retirement Plan members are not included in the numbers above.

Source: PMR © A224, A236, A243, A250 and OLO calculations

How many administrators and which types of administrators are eligible to retire within the next five to ten years?

- In FY06, MCPS had a total of 579 administrators. Of this group, 24 percent are eligible to retire within five years; another 23 percent are eligible to retire within the next ten years.
- Eligibility for retirement varies by position. Nearly 55 percent of all principals can retire within the next 10 years compared to 31 percent of assistant principals and 26 percent of student support specialists.

Category 4 - Salaries

This section describes selected salary data from the SSP, including salary schedule placement for teachers and average salaries for positions in MCPS. Tables are presented for:

- a. Salary Schedule Placement for Teachers
- b. Average Salaries by Employee Group
- c. Average Salaries for MCEA Positions

Additional data in the SSP includes salary schedule placement for administrators and support services staff as well as annual salary levels for other professionals, teachers, and new teachers.

a. Salary Schedule Placement for Teachers

Table 18 describes the salary schedule placement for teachers in FY06. A teacher's degree determines pay grade (e.g., Bachelor's, Master's Equivalent/Master's) and years of experience influences step within the pay grade. MCPS has 25 steps per teacher pay grade, with 1 being the lowest step. The SSP reports the number and percent of teachers who fall into each pay grade and step. The table below highlights only those teachers at the highest and lowest points within each pay grade.

Table 18: Salary Schedule Placement for Teachers, FY06

	Bachelor's	Master's Equivalent/Master's	Master's Equivalent/Master's +30	Master's Equivalent/Master's +60	Percent of Total
Teachers (N=11,209)					
Percent in Grade	18.5	44.6	26.2	10.7	100.0
Percent at Step 1	20.4	5.0	0.9	1.6	6.4
Percent at Step 25	0.0	9.0	25.4	32.5	14.1
New Teachers (N=1,136)					
Percent in Grade	43.8	42.9	8.8	4.5	100.0
Percent at Step 1	74.3	46.0	24.0	37.3	56.1
Percent at Step 25	0.0	0.0	1.0	0.0	0.1

*Additional education-related course work earned after a bachelor's degree

Source: PMR © A273, A262

Where are newly hired teachers placed within the pay schedule?

- In FY06, MCPS hired 1,136 new teachers. Of these, 43.8 percent were in the Bachelor's degree pay grade and 42.9 percent were in the Master's Equivalent/Master's degree pay grade. 56.1 percent of new teachers were hired at Step 1 of their respective pay grade.

What is the distribution of all teachers within the pay schedule?

- In FY06, more teachers were placed in the Master’s Equivalent/Master’s pay grade (44.6%) than in any other pay grade.
- In FY06, 6.4 percent of MCPS’ 11,209 teachers were at Step 1 of their pay grade and 14.1 percent were at the top of the pay grade.

b. Average Salaries by Employee Group

Table 19 describes number of employees by headcount and FTE and average salary per FTE for five groups of employees: executive, administrative and supervisory, other professionals, teachers, and support services.

Table 19: Average FY06 Salaries by Employee Group

Employee Group	Number of Employees (Headcount)	Number of Filled FTE	Average Salary/ Filled FTE
Executive Staff	20	20.0	\$143,830
Administrative and Supervisory (MCAASP)	665	665.0	\$105,720
Teachers and Other Professionals (MCEA)	11,655	11,213.2	
<i>Other Professionals (12-month MCEA)</i>	440	427.8	\$90,742
<i>Teachers (10-month MCEA)</i>	11,215	10,785.4	\$64,852
Support Staff (SEIU)	8,946	7,553.5	\$36,478
Total	21,286	19,451.7	n/a

Source: PMR © A215

What percent of MCPS staff are represented by a bargaining unit, and how many are represented by each unit?

- MCPS had 21,286 staff in FY06: 3.1 percent (665) of MCPS staff were represented by MCAASP, 54.8 percent (11,655) by MCEA, and 42 percent (8,946) by SEIU. Twenty executive-level staff were not represented by a bargaining unit.

What are average salaries by position level?

- In FY06, the average FTE salary for administrators represented by MCAASP was \$105,720. For 12-month other professionals represented by MCEA, the average FTE salary was \$90,742, while for 10-month teachers it was \$64,852. For support services employees represented by SEIU, the average FTE salary was \$36,478.

c. Average Salaries for MCEA Positions

Table 20 describes trends in average salaries among MCEA-represented positions between FY03 and FY06.

Table 20: Average Salaries for MCEA Positions, FY03-FY06

Position	FY03	FY04	FY05	FY06	FY03-FY06 Change	
					\$	%
Other Professionals	\$84,138	\$88,957	\$88,840	\$91,099	\$6,961	8.3%
Teachers	\$58,758	\$62,156	\$63,131	\$64,841	\$6,083	10.4%
New Teachers	\$42,791	\$42,044	\$45,839	\$46,971	\$4,180	9.8%

Source: PMR © A258, A274, A263

What are the trends in average salaries for MCEA-represented positions?

- From FY03 to FY06, the average salary for other professionals increased from \$84,138 to \$91,099, or by 8.3 percent.
- From FY03 to FY06, the average salary for all teachers increased from \$58,758 to \$64,841, or by 10.4 percent. For new teachers average salary increased by 9.8 percent from \$42,791 to \$46,971.

Chapter IV: Findings and Recommendations

The purpose of this Office of Legislative Oversight project was to become conversant with the workforce data currently provided to the Council each year in Montgomery County Public Schools' Staff Statistical Profile, and to make recommendations on how Councilmembers could make greater use of these data in Council decision-making and related oversight activities.

This final chapter provides OLO's findings and recommendations as follows:

- **Part A, Findings**, outlines OLO's findings based on review of MCPS' Staff Statistical Profile and general research on strategic workforce planning;
- **Part B, Recommendations**, offers two recommendations for Council action related to the Council's future requests and potential uses of MCPS workforce data; and
- **Part C, Suggested Questions Related to the Council's Review of Workforce Data**, offers a series of questions that the Council may want to consider using in their annual review of agency workforce data.

A. Findings

This section presents the three findings that emerged from OLO's analysis of the MCPS Staff Statistical Profile and review of the workforce planning literature.

Finding #1: The MCPS Staff Statistical Profile (SSP) provides important data about the MCPS workforce. However, the current format and contents of the SSP are not conducive to an efficient review by Councilmembers during their agenda-packed operating budget worksessions.

The SSP offers considerable information on the size and characteristics of the current MCPS workforce overall and by bargaining unit. It provides data for several positions, including teachers and principals. The SSP also includes longitudinal data in several areas that include staff diversity, experience, and turnover. However, the usefulness of the SSP to the Council as MCPS' submission to the *Personnel Management Review (PMR)* is limited due to its current format and structure.

Limitations of the Staff Statistical Profile as MCPS' PMR submission include:

- *Its length* – In 2006, the SSP included more than 70 tables and graphs. As such, the SSP offers “too much” information for the Council to absorb within the limited timeframe of annual budget worksessions.
- *The absence of an executive summary* – The SSP does not include an executive summary of the “news” reported in the raw data. This lack of text to interpret data for the reader limits Councilmembers' efficient use of MCPS workforce data to inform their decision-making.

Finding #2: The literature on strategic workforce planning suggests that stakeholders can benefit from reviewing workforce data within the context of workforce performance targets.

The meaningful analysis of data on variables such as workforce size, skills, and demographics requires information about what an organization is trying to accomplish, i.e., its workforce goals. As reviewed in Chapter II, the workforce planning process offers a framework for understanding the potential uses of workforce data by different stakeholders. Elected officials and others outside an agency can use the workforce goals and performance data generated by workforce planning to improve their understanding of both management and funding decisions.

Public and private agencies often engage in workforce planning to ensure that they have “the right people with the right skills in the right jobs at the right time.” Workforce planning includes compiling and analyzing baseline personnel data and comparing it to projections for future staffing supply and demand. Comparing the existing workforce to workforce needs can help agency managers to first identify and then employ strategies to address workforce gaps.

Finding #3: In its current form, the Staff Statistical Profile does not provide context for the Council to understand MCPS’ progress on its workforce goals or the cost-effectiveness of workforce strategies employed.

The Council has never asked MCPS or the other agencies to submit data on workforce targets or the impact of workforce strategies on workforce trends as part of the *Personnel Management Review*. However, as the Council considers MCPS’ requests for new programming, changes in staffing, and compensation, understanding MCPS’ progress on its workforce goals can serve as a critical component of the Council’s decision-making.

B. Recommendations

The Office of Legislative Oversight offers two recommendations for Council action related to the Council’s future requests and uses of MCPS workforce data. In sum, Recommendation #1 outlines suggestions for improving the format and presentation of the data that MCPS submits to the *Personnel Management Review (PMR)*. Recommendation #2 identifies the additional information that the Council should request from MCPS in order to provide the needed context for assessing the raw data provided in the Staff Statistical Profile.

Recommendation #1: Request that MCPS reorganize and provide explanatory text to the workforce data presented in future submissions to the Personnel Management Review.

With the goal of producing a more concise and useable document, the Council should request that MCPS reorganize and provide an executive summary in its future submissions of workforce data to the *Personnel Management Review (PMR)*. The approach taken by OLO in Chapter III to condense the over 70 tables from the April 2006 SSP into 16 tables provides an example of how this might be done.

In particular, OLO recommends that MCPS present workforce data in four categories: (1) demographics; (2) staff qualifications; (3) turnover and retirement eligibility; and (4) salaries. This reorganization of MCPS data for its PMR submission from positions to common themes could reduce the length of the document and enable a more manageable review by the Council.

OLO also recommends that the Council ask MCPS to provide some selected trend calculations (e.g., changes in key variables over time) and an executive summary that highlights “the news” contained in the workforce data provided. Finally, in order that these data are more readily understood by lay readers, OLO recommends the Council ask MCPS to add a glossary of key terms used in its PMR submission.

Recommendation #2: Request that MCPS provide context for the Council review of the workforce data submitted for inclusion in the Personnel Management Review.

In order to react to information about the MCPS workforce as “good” or “bad” news, the Council needs to understand how MCPS’ current workforce compares to the school system’s overall workforce needs, both now and in the future. As the Council considers annual requests for new programming, changes in staffing, and compensation adjustments, the Council should examine whether MCPS’ proposals align with the agency’s current and long term workforce goals. Of particular interest to the Council should be data on the current and projected gaps and surpluses in MCPS skill sets, e.g., highly qualified teachers.

Some of the performance targets currently included in the *Office of Human Rights’ Family of Measures* (as outlined in Chapter II) can be included in future PMR submissions to offer context to the MCPS workforce data reported. Additionally, OLO recommends that MCPS develop specific performance targets for Goal 4 of *Our Call to Action* and other measures of performance for its workforce initiatives to include in their future PMR submissions. The pairing of workforce trends to targets should facilitate the Council’s understanding and practical use of MCPS workforce data in their annual budget decision making and general oversight of the MCPS budget.

C. Suggested Questions Related to the Council’s Review of Workforce Data

In assigning this project to OLO, the Council indicated that the findings and recommendations on making greater use of MCPS’ workforce data might also apply to other County-funded agencies. This final section outlines some questions that the Council could pose to agency staff during worksessions as they review agency workforce data and targets.

The first set of suggested questions can improve the Council’s understanding of the strategic workforce goals of each agency, their progress in meeting those goals, and the anticipated costs of reaching workforce goals. The second set of suggested questions can improve the Council’s understanding of the costs and cost-effectiveness of workforce strategies employed by agencies to reach their workforce goals.

Set of Suggested Questions #1 - Workforce Goals:

- 1. What are the agency's current workforce gaps? What are the anticipated costs of closing the gaps? What strategies are being used or considered? What progress has been made? What progress is anticipated in the future?*
- 2. What are the agency's projected workforce gaps? What are the anticipated costs of closing projected gaps? What strategies are being considered? What progress is anticipated?*
- 3. Has the agency identified hiring and retention objectives? What are the anticipated costs of reaching these objectives? What strategies are being used or considered? What progress has been made? What progress is anticipated in the future?*
- 4. Has the agency identified diversity objectives? What are the anticipated costs of reaching these objectives? What strategies are being used or considered? What progress has been made in meeting diversity objectives? What progress is anticipated in the future?*
- 5. Has the agency identified mission and program goals? What are the anticipated costs of reaching these goals? What strategies are being used or considered? What progress has MCPS made on its goals? What progress is anticipated in the future?*

Set of Suggested Questions #2 - Costs and Cost-Effectiveness of Workforce Strategies:

- 1. What have been the costs of workforce improvement strategies employed by the agency? How do new funds appropriated for workforce strategies compare to the on-going costs to continue specific workforce strategies?*
- 2. Which workforce strategies have been most cost effective? What has been the impact of these strategies on workforce trends? What has been the return on spending for these strategies relative to performance measures of success? Can these strategies be expanded?*
- 3. Which strategies have been least cost effective? What has been the impact of these strategies on workforce trends? Will dollars currently supporting ineffective strategies be reallocated to support more cost-effective strategies? If not, what steps will be taken to improve cost-effectiveness?*
- 4. What are the anticipated budgetary implications of future workforce strategies in consideration? What funding revenue sources are being considered to support new workforce initiatives?*

As the Council considers using the questions above to link workforce data to Council budget decision-making and oversight, the Council may want to consider holding additional worksessions to review PMR data beyond the April MFP worksessions focused on compensation. These additional worksessions, combined with the reorganization of PMR data, could enhance the Council's opportunity to fully absorb, discuss, and constructively use agency workforce data to inform decision-making.

Chapter V: Agency Comments

This OLO report incorporates technical corrections and comments provided by MCPS staff. As always, OLO greatly appreciates the time taken by staff to review our draft report and provide feedback. Formal agency comments on the recommendations are expected to be received in time for the Management and Fiscal Policy Committee worksession on April 16, 2007.



April 11, 2007

Ms. Karen Orlansky
Director, Office of Legislative Oversight
Montgomery County Council
100 Maryland Avenue
Rockville, Maryland 20850

Dear Ms.  Orlansky:

Thank you for providing the draft Office of Legislative Oversight (OLO) report on the Montgomery County Public Schools (MCPS) Workforce Data project. This project has provided a comprehensive review of workforce data relevant to the MCPS operating budget and long-term human resources strategy. MCPS staff has reviewed the draft report and found it to be thoughtfully written and helpful to our common goal of assisting the County Council and the general public to make budget decisions regarding MCPS.

I appreciate the collaborative relationship that Ms. Elaine Bonner-Tompkins of the OLO staff developed with MCPS staff with whom she worked during the project. She provided them with an ongoing opportunity for input into the development of the report and responded to technical suggestions.

Regarding Finding 1, the OLO report notes that MCPS uses the data from the annual Staff Statistical Profile (SSP) for many purposes, including developing strategies for the recruitment and retention of teachers and other personnel, meeting specified goals for diversity in staff demographics, planning for leadership development, and budgeting. The comprehensive nature of this report makes it possible to accomplish the many purposes intended for the report. OLO notes that the County Council has its own purposes for using the report. I am hopeful that the County Council's goals can be met within the format of the existing information rather than through a separate report. In the past, Council members have selected from the available material for all agencies without requiring preparation of a distinct report. Although the current report does not provide analytical comments on the data, MCPS users do considerable analysis using the data in the SSP. The results of this analysis may be found in the annual MCPS Strategic Plan—*Our Call to Action: Pursuit of Excellence* and in the *Annual Report on Our Call to Action*. The material presented there may be of great interest to the County Council.

Regarding Recommendation 1, MCPS agrees that the County Council should review workforce data in more detail as part of its ongoing examination of county workforce patterns. Rather than commissioning a new report, the County Council may wish to review its needs across all agencies before asking MCPS to prepare an additional report.

Office of the Superintendent of Schools

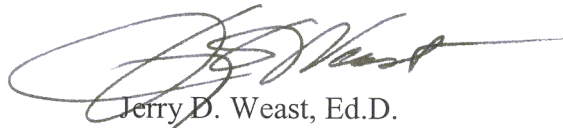
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Regarding Recommendation 2, MCPS agrees that the review of workforce data needs to include a review of goals and accomplishments. Much of that is already done in the *Annual Report on Our Call to Action*. Even more can be accomplished through discussion with the County Council. MCPS concurs with the recommendation that the County Council can benefit greatly from additional workforce sessions.

Because many of the issues raised by the report are long-term workforce excellence issues, it is our expectation that the Education Committee and the full County Council will continue to study the recommendations after work is completed on the FY 2008 Operating Budget.

The members of the Board of Education and I look forward to working with the County Council as this report is reviewed and discussed. I believe that the development of useful workforce data for MCPS and other county agencies will be an ongoing process that will prove most valuable. The goal will be to ensure that MCPS attracts and retains the high quality staff that our constituents expect and deserve.

Respectfully,

A handwritten signature in black ink, appearing to read "J. D. Weast", with a long horizontal flourish extending to the right.

Jerry D. Weast, Ed.D.
Superintendent of Schools

JDW:jp

Copy to:

Members of the Board of Education
Mr. Ikheloa
Executive Staff
Ms. DeGraba