



NEW MEXICO
Public Education Department

Manual of Procedures for the Calculation of the Training & Experience Index

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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 Index 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
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300 Don Gaspar
Santa Fe, New Mexico 87501
(505) 827-3860

**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.

PLEASE REFER TO STATUTE SECTION 22-8-6.1 REGARDING CHARTER SCHOOLS, WHICH PROVIDES FOR ALL CHARTER SCHOOLS TO USE THE TRAINING AND EXPERIENCE INDEX OF THE SCHOOL DISTRICT WHERE THEY ARE GEOGRAPHICALLY LOCATED.

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. For fiscal year 2008, and for the first year of operation in any fiscal year thereafter, the budget of every state-chartered charter school shall be based on the projected number of program units generated by that charter school and its students, using the at-risk index and the instructional staff training and experience index of the school district in which it is geographically located. For second and subsequent fiscal years of operation, the budgets of state-chartered charter schools shall be based on the number of program units generated using the average of the eightieth and one hundred twentieth day MEM of the prior year and its instructional staff training and experience index and the at-risk index of the school district in which the state-chartered charter school is geographically located. The budget shall be submitted to the division for approval or amendment pursuant to the Public School Finance Act [[22-8-1](#) NMSA 1978] and the Charter Schools Act [[22-8B-1](#) NMSA 1978].
- B. Each locally chartered charter school shall submit to the local school board a school-based budget. For fiscal year 2008, and for the first year of operation in any fiscal year thereafter, the budget of every locally chartered charter school shall be based on the projected number of program units generated using the average of the eightieth and one hundred twentieth day MEM of the prior year, using the at-risk index and the instructional staff training and experience index of the school district in which it is geographically located. For second and subsequent fiscal years of operation, the budgets of locally chartered charter schools shall be based on the prior year program units generated by that locally chartered charter school and its students and its instructional staff training and experience index and the at-risk index of the school district in which the locally chartered charter school is geographically located. The budget shall be submitted to the local school board 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

**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 2008-2009:

22-10A-7. Level one licensure.

22-10A-7.G. Level one teacher's minimum salary - \$ 30,000.

22-10A-10. Level two licensure.

22-10A-10.D. Level two teacher's minimum salary - \$ 40,000.

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

22-10A-11.C. Level three-A teacher's minimum salary - \$ 50,000.

NEW MEXICO PUBLIC EDUCATION DEPARTMENT'S 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. 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	_____
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. Do not count for training and experience reporting purposes administrators or those personnel excluded under 22-8-24 (A) (1) NMSA 1978. Contract days and contract hours funded from sources other than the State Equalization Guarantee 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 (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 within 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. 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 recognizes the full year of experience for salary purposes.

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 on page 6.) 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 7.)

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.

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.

B. Reported experience must be related to instruction and must be in accordance with local or governing board policy and verified by use of a verification form, a W-2 form, or an in-district contract and evaluation form.

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 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)]

3. 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 prior year if additional out-of-district years of experience will be recognized for salary purposes.

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.

- 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.

Additional PED Requirements for Calculation of the Training and Experience Index

1. **LICENSURE:** For training and experience purposes, a teacher must be licensed in order to be placed on the training and experience matrix in the calculation of the school district's or charter school's training and experience index for that year.
2. **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.
6. **RELATIONSHIP OF THE APPROVED SCHOOL DISTRICT'S OR CHARTER SCHOOL'S SALARY SCHEDULE TO THE TRAINING AND EXPERIENCE MATRIX IN STATUTE:**
Section 22-8-24 NMSA 1978 does not require that a district salary schedule correspond exactly to the statutory training and experience matrix. School districts and charter schools are free to deviate from the matrix so long as they are not in violation of 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) 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) 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 it does not recognize for 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.

7. **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.

8. **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 Information

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. Instructor Licensure Records

E. Administrative Training Records

F. Health Records

G. Evaluation Records

H. Miscellaneous Information

I. Personal and Confidential Records

III. File Folder Organization

I. Purpose

The intent of this packet is to inform and show one way in which your school district or charter school can organize your 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 Office of Inspector General, 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 on page 15.)

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 on page 16.)

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. Instructor Licensure Records

This section of the folder should include all licensure documents which pertain to the qualifications of the instructor, including the 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.

E. Administrative Training Records

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

F. 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.

G. Evaluation Records

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

H. Miscellaneous Information

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

I. 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.

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
