



Teacher Career Advancement Initiatives: Lessons Learned from Eight Case Studies



Phase II of Creating Sustainable Teacher Career Pathways: A 21st Century Imperative

A report prepared for the National Network of State Teachers of the Year (NNSTOY) and Pearson by

Catherine Fisk Natale, Ph.D.
Independent Education Consultant

Lynn Gaddis, Ed.D.
National Board Certified Teacher, Illinois Teacher of the Year (1995)

Katherine Bassett
Executive Director and CEO, NNSTOY

Katherine McKnight, Ph.D.
Pearson





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¹ Complementary case study conducted by Public Impact not part of the on-site case studies conducted by the Pearson/NNSTOY research team



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Executive Summary

The purpose of this report is to describe what we learned from studying eight teacher career advancement initiatives implemented across a variety of contexts, including urban, suburban, and rural districts; high poverty and affluent districts; and in schools/districts both with and without strong union presence. We describe key principles for developing successful, sustainable teacher career advancement initiatives. This report is the product of a three-year study conducted by the Center for Educator Learning and Effectiveness at Pearson and the National Network of State Teachers of the Year (NNSTOY) in partnership with the National Education Association and Public Impact and with assistance from the American Federation of Teachers. It represents the second phase of our research into how the teaching profession needs to evolve to meet 21st century career expectations for a new generation of teachers and learners. This report provides our findings from case studies of schools and districts with established career advancement initiatives as well as several in the early stages of implementation. Our goal is to identify, based on our research, the components of a successful, sustainable teacher career continuum that has a positive impact on teacher recruitment, teacher retention, teacher job satisfaction, and student achievement. Our recommendations reflect the importance of intentional and systematic policies and strategies in order to create sustainable and long-term solutions that address the career aspirations of a new generation of teachers who want to be leaders from the classroom.

Key findings from case studies

We conducted site-visits in seven schools/school districts between 2013 and 2015. In addition, we include data from a complementary case study of the Opportunity Culture (OC) initiative conducted in coordination with Public Impact in Charlotte-Mecklenburg, North Carolina.

- » ***Aspire Summit Charter Academy's College Ready Promise Initiative (Modesto, California)*** illustrates the power of a positive culture and enthusiasm of teachers for opportunities for positive growth and collaboration.
- » ***DC LIFT (Washington, D.C.)*** shows that leadership opportunities linked to increased salaries are powerful instruments to attract and retain teachers.
- » The ***Denver Differentiated Roles Pilot (Denver, Colorado)*** informs us that flattening leadership structures by providing more teacher leadership roles may improve both teacher and administrator effectiveness and help create funding structures to better sustain teacher leadership structures over time.
- » The ***Knox County TAP Program (Knox County, Tennessee)*** provides evidence of the positive impact of teacher career advancement programs on student achievement and the possibility of adopting major features of the TAP initiative—including lead teacher positions that involve instructional support, coaching and peer evaluation as well as strategic compensation initiatives—into the district's long-term strategies when federal grants expire.
- » The ***Scottsdale Career Ladder Program (Scottsdale, Arizona)*** illustrates that the legislative phase-out of a long-term teacher advancement initiative risks undoing a culture of collaboration and collegial interaction and the resulting student learning gains.
- » The ***Southeast Polk Teacher Leadership and Compensation Initiative (Southeast Polk Community School District, Iowa)*** informs us about the importance of “readiness” and enlisting strong stakeholder support for teacher career pathways, as well as the value of state leadership and support for launching teacher career advancement initiatives.
- » The ***Seattle Career Ladder Program (Seattle, Washington)*** illustrates that offering leadership opportunities to teachers is a powerful teacher recruitment tool and that there are benefits to providing building-level flexibility in the implementation of teacher career opportunities.
- » The ***L.I.F.T. Opportunity Culture Initiative (Charlotte-Mecklenburg, North Carolina)*** offers a model in which teacher leader roles can be sustainably funded within existing budgets by exchanging existing roles for new, higher paid roles and using technology and teaching assistants strategically.



The design features of teacher career advancement initiatives

Results from this research highlight the following elements that should be addressed in the design phase of an initiative.

Teacher leader roles, eligibility criteria and the selection process

- » To increase the systemic impact of highly effective teachers, teacher leader roles need to be structured to promote collaborative work. This will help strengthen teaching and learning.
- » Teaching excellence (determined through the use of objective, valid measures of teacher effectiveness) plays a critical role in determining eligibility for teacher leader roles and assuring the credibility of teachers selected for those roles.

Opportunities for collaboration/released time

- » In-depth conversations between teacher leaders and peers are more difficult if they do not occur on a timely and regularly scheduled basis during the school day.
- » Giving teachers “opt-in/opt-out” options as well as deliberately scheduling teacher leader and team time are viable options for balancing the responsibilities and time commitments of leadership roles.

Compensation

- » Increased compensation for teachers in leadership roles is validating for the acceptance of new responsibilities. Perceived equity of compensation structures is critical to the acceptance of teachers in new leadership roles.
- » When there is adequate released time, training and support to perform their leadership roles, additional compensation may be less critical to teacher leaders.

Peer coaching/peer evaluation

- » Coaching benefits both the mentor and mentee in terms of promoting practices that lead to increased instructional effectiveness.
- » In those districts that merged peer evaluation with peer coaching, there was evidence of strong district leadership and support from major stakeholders in the district, including strong association/union support. In addition, in order to build a culture that successfully dealt with the tensions between coaching and the consequences of evaluation, it was critical that the evaluation system was transparent and conducted by well-trained peer evaluators and time provided for staff to adjust to these changes.

Professional development of teachers and teacher leaders

- » Professional development is viewed by teachers as being more effective when it is embedded in the district’s curriculum, instruction and assessment system and delivered in a consistent, timely manner through collaborative teams of teachers.
- » Training for teacher leaders around their specific leadership roles and the related competencies they need is critical for their effectiveness and acceptance by their peers.

Teacher voice in school leadership

- » Purposefully structured occasions for teacher input, such as leadership team meetings, focus groups or surveys, ensure that teachers feel their voices are being heard in the development and implementation of the program—thereby lending credibility to teacher career advancement initiatives.
- » Increasing teacher voice in school decision-making represents a culture shift requiring respect by teachers and principals for one another’s expertise and ability to cope with change.

Enabling conditions to launch and sustain teacher career pathways

Some of the requisite conditions needed to successfully launch and sustain teacher career pathways include:

Readiness

- » Speed and success of implementation will be positively influenced by the extent to which the teacher career initiative maps onto the district’s strategic priorities and districts and schools engage in shared leadership.
- » Piloting differential teacher roles and career options on a voluntary basis with a “coalition of the willing” can help build support over time and prepare other schools to adopt those models.

Leadership

- » Strong district leadership is a necessary prerequisite for teacher career initiatives to be successful or sustainable.
- » Transitions in district-level leadership—especially in large urban districts—are a cause for concern among teachers and administrators, who worry about the impact of politics on leadership continuity and the initiatives launched by former leaders.

Stakeholder involvement

- » Engaging teachers, administrators, teacher associations/unions, school boards, parents and the community is critical not just for launching an initiative, but for ensuring support in the long-term.
- » Teacher involvement in the design of a teacher career path initiative plays an important role in creating support for the program at the school level. Similarly, teachers need to be engaged in providing ongoing feedback on the success and challenges of the initiative.

School culture

- » Teacher leaders play important roles as culture changers by serving as models of enthusiasm and commitment in order to give colleagues time to adapt to change.
- » Administrators play critical roles in creating positive school cultures by partnering with teachers to access their voice in decision-making, seeking advice in solving issues, and recognizing and promoting leadership qualities in all teachers, regardless of whether they have formal leadership roles.



Funding sustainability

- » State, federal or private foundation grant funding can be invaluable to “kick-start” teacher career advancement initiatives.
- » Planning up-front on how to continue the initiative after grants phase out is critical for program credibility and staff buy-in—particularly veteran staff who have seen grant-funded programs come and go.

Key trends, benefits, and issues

The following are general observations from our study of teacher career pathways initiatives.

Districts observed improved trends in the recruitment and retention of teachers: All districts with teacher career advancement initiatives reported increased retention rates and an increase in applicants to teach in the district. These case studies also illustrate that teacher leadership opportunities have a positive impact on retention of effective, experienced teachers.

Creating time for teachers to meet and collaborate is an ongoing challenge for districts:

There are significant costs associated with releasing teachers full-time for instructional coaching and replacing those teachers in the classroom. That is why most teacher career initiatives studied here require teacher leaders to have full-time teaching responsibilities, with substitutes to provide time to mentor or coach and stipends to cover after-school and summer work. In response to the challenges of adding teacher leadership responsibilities to full-time classroom teachers, some districts have adopted “hybrid” teaching/coaching roles.

Increased collegial interaction and shared responsibility for one’s colleagues is an important benefit:

One of the most commonly cited advantages of teacher career advancement initiatives was more collegial interaction, with teachers working with colleagues across grade levels and subject areas. In some sites, however, it took time and effort to change the culture of isolation and promote sharing of practice and collaboration. Increased collegial interaction resulted in teachers feeling responsible for the success of their colleagues in improving student learning.

There is some evidence of a positive impact on teacher effectiveness and some short-term student learning outcomes:

There is limited “hard data” in these case studies about the impact of teacher career advancement initiatives on student achievement, although there is much anecdotal evidence from teacher and administrator focus groups. Some programs have been in effect for a relatively short period of time and are often accompanied by other district reform initiatives. Nonetheless, teachers and administrators almost universally cited the benefits of collaboration, focused conversations on curriculum and instruction, lesson modeling, and reflection on teacher effectiveness.

Teachers in leadership roles report greater job satisfaction: The general consensus of teacher leaders interviewed in these studies was that motivation and job satisfaction were positively affected by opportunities for collaboration and professional development, recognition as leaders in their district, and opportunities for additional compensation. Some teachers were inspired to pursue other leadership or recognition opportunities, such as National Board certification. The fact that teachers can take on leadership roles without stepping into formal administrator roles is perceived as a significant positive feature of the teacher career advancement initiatives.

Teacher/administrator relations and the roles of principals change in positive ways, but present new challenges: Our case studies provided evidence that teacher career advancement initiatives benefit principals by creating shared leadership structures in schools and giving teachers more voice in school decision-making. Relations between teachers and administrators become more collaborative. Additionally, the need to manage teams of teacher leaders requires new skills and support for principals.

There are significant challenges in sustaining teacher career pathways initiatives: There is strong evidence that launching a teacher career pathway initiative requires vision, stakeholder support (teachers in particular), a school/district culture that can deal with change and ambiguity, and external support—either monetary or technical assistance. Sustaining these initiatives requires much the same, except that funding continuity is the greatest challenge. In almost all cases, some form of external funding was required to launch the initiative, with varying levels of district funding sources. However, grants are designed to launch programs, not sustain them. The good news is that some of our study sites are navigating this treacherous territory with success (e.g., Seattle), while others are struggling or have not yet faced the challenge. The CMS OC initiative offers an alternative to the traditional ways in which teacher leadership roles are funded and can be maintained sustainably over time. Denver offers a vision of flattening the organizational structure of schools and replacing some highly paid administrative positions with teacher leaders.

Finally, we offer some key principles for developing a successful, sustainable teacher career advancement initiative:

- » Think strategically and proactively in order to be ready when opportunity presents itself.
- » Secure broad stakeholder support and teacher voice in the design of the initiative.
- » Consider funding sustainability in not just the short-term, but over the long-term.
- » Focus attention on other dimensions of sustainability.
- » Ensure timely training for principals and teacher leaders.

The next few years will be critical in determining whether the teacher career advancement initiatives highlighted in this report will continue, expand or be modified. It is our hope that the lessons learned and recommendations contained in this report will help propel more schools and districts to implement innovative, sustainable teacher career advancement initiatives.



Introduction

“This...was a sense maker; it makes sense for teachers to have this pathway of taking on a role—it’s like being a master teacher. I’ve been doing this, I have good success, I’ve been rated as effective and I want to continue to teach but I want to evaluate and coach others in my craft because I’ve earned that. So I think it’s been really positive. It’s a sense maker.”

—Denver Differentiated Roles Pilot teacher

The purpose of this report is to describe what we learned from studying eight teacher career advancement initiatives implemented across a variety of contexts, including urban, suburban, and rural districts; high poverty and affluent districts; and in schools/districts both with and without strong union presence. The result of our work is the identification of key principles for developing successful, sustainable teacher career advancement initiatives. This report is the product of a three-year study conducted by the Center for Educator Learning and Effectiveness at Pearson and the National Network of State Teachers of the Year (NNSTOY) in partnership with the National Education Association and Public Impact and with assistance from the American Federation of Teachers. It represents the second phase of our research into how the teaching profession needs to evolve to meet 21st century career expectations for a new generation of teachers and learners. The first part of our research resulted in a published report, entitled *Creating Sustainable Teacher Career Pathways: A 21st Century Imperative* (Natale et al., 2013).²

² This report can be found as follows: http://researchnetwork.pearson.com/wp-content/uploads/cstcp_21ci_pk_final_web.pdf and http://www.nnstoy.org/download/Various/CSTCP_21CI_ExSummary_pk_final_web.pdf

That report reviewed the literature on past and present initiatives that promoted teacher leadership, differentiated staffing in schools, and career ladders or teacher career pathways. It also examined current trends in career advancement structures in industrial organizations. We showcased recent initiatives at the local, state and national level that promote teacher role differentiation and create different models of teacher staffing. We also highlighted teacher policies in select countries whose students are high achieving and where there are examples of diverse approaches to teacher leadership roles and career paths. We interviewed representatives of all 50 state education agencies and/or state professional standards boards, plus the District of Columbia, to discuss states' current and proposed initiatives related to teacher career advancement. In that report, we made initial policy recommendations regarding the conditions necessary to create sustainable teacher career pathways.

This second phase of our work presents our findings from case studies of schools and districts with established career advancement initiatives, as well as several in the early stages of implementation. Our goal is to identify, based on our research, the components of a successful, sustainable teacher career continuum that has a positive impact on teacher recruitment, teacher retention, teacher job satisfaction, and student achievement. The data collected from our on-site studies will serve as the basis for part three of this series, which will feature a set of recommendations for schools or districts considering the development of a teacher career advancement initiative.

An increasing urgency to create sustainable teacher career pathways

Our 2013 report made the case that in order to recruit high-achieving young people into the teaching profession, we must reward teachers for excellent job performance; provide high-performing teachers with promotional opportunities without requiring them to leave the classroom full-time to become administrators; and institute differentiated pay based on performance and differentiated roles. We also need to consider teacher job restructuring in the context of improving the effectiveness of administrators.

Phase one of our work pointed out that Generation Y teachers—who are expected to comprise 50% of the teaching force by 2020 (Coggshall et al., 2011)—have different expectations than previous generations regarding working conditions, compensation, and career staging. The business world views human capital development and talent management as critical priorities in addressing an emerging workforce changing demographics, diverse talent and different career expectations. Individuals are moving in and out of jobs more frequently, making it more difficult to retain and develop talent. Similarly, the education profession needs to focus its attention on the costs of underutilizing the talents of both new and experienced teachers in terms of the human and financial costs of turnover, attrition and the loss of expertise (Haynes, 2014; Barnes, Crowe & Shafer, 2007, Hess, 2009; Huang and Moon, 2009; Carroll & Foster, 2010).

Research suggests that Gen Y members often view careers as personalized paths that need to fit their individual interests and career development goals (Benko & Weisberg, 2008). Similarly, Gen Y teachers cite the need for new challenges and opportunities to avoid burnout or boredom (Coggshall et al., 2009; Coggshall et al., 2011; TNTP, 2012). Although teaching as a lifetime career may not fit the aspirations of Gen Y, providing additional career stages which recognize expertise and teacher effectiveness and which offer career advancement without leaving the classroom may provide incentives for highly motivated and qualified teachers to remain longer in the profession.



There are some disturbing indications that teaching is increasingly being perceived less favorably as a profession for young people. Between 2008-09 and 2012-13, there has been a 30% drop nationally in enrollments in traditional and alternative route teacher preparation programs. Some states, such as Texas and North Carolina, have witnessed even greater reductions (U.S. Department of Education, 2015). In its 2013-14 report, the California Commission on Teacher Credentialing noted that 2013-14 was the tenth consecutive year in which the number of teacher credentials issued has decreased, with a 26 percent decrease over the past five years (Commission on Teacher Credentialing, 2015). The New York Times reported that applications for Teach for America, a program to recruit elite college graduates to teach in high poverty schools, have declined by 10% from 2013 to 2014, and the size of its teacher corps could decrease by as much as a quarter (Rich, 2014).

The 2013 MetLife survey indicated that the percentage of teachers reporting to be “very satisfied” with their jobs had declined to 39% in 2012, compared to 62% in 2008. The MetLife report further comments that

In the context of additional challenges for leading schools toward greater improvement, the continuing decline in teacher morale identifies itself as an urgent priority. During a time when expectations and standards are increasing for effective teaching and learning, teacher morale is yet another declining resource, one that is associated with schools with diminished budgets and other resources, fewer students meeting standards and fewer colleagues highly rated for how well they are doing their job. Teacher leadership emerges as a potential resource for translating big challenges into opportunities, served by hybrid roles for teachers as leaders and as a method for addressing professional growth and satisfaction. (MetLife, 2013, p. 51)

A flat or narrowly linear career in teaching as it is currently structured in most school districts is not compatible with the expectations of a modern workforce. Coggshall et al. (2009) present one alternative to a traditional teacher career path that allows teachers to specialize according to their skills and expertise, the demands of the curriculum, and the needs of children. In their “neo-differentiated staffing” model, teachers would be able to move flexibly between roles as their expertise shifts, interests evolve, and family responsibilities grow and recede. They work collaboratively with colleagues and accept the idea of differentiated pay. Hassel and Hassel (2009, 2013) take the idea of career restructuring even further in their “Opportunity Culture” model, in which teachers’ jobs are re-designed to “extend the reach” of excellent teachers to more students and lead peers, for more pay. In some cases, age- and child-appropriate technology is used to put excellent teachers in charge of more students’ learning and other teachers’ development—all within current available budgets.³

³ Note that this report presents in more detail a complementary case study of the Opportunity Culture (OC) initiative implemented in the Charlotte-Mecklenburg, North Carolina school district (CMS).

The need to restructure the roles of administrators as well as teachers

Teachers are not alone in experiencing declines in morale. Principal job satisfaction has also been on the decline, with 59% of principals reporting positive job satisfaction in 2012 compared to 68% in 2010. Further, 74% of principals agreed somewhat or strongly that the job of the principal had grown too complex (MetLife, 2013). This is hardly surprising, given the pressures on school administrators for boosting student achievement in a period of shrinking budgets and increased state and federal accountability mandates.

In order to deal with the stresses and mandates of 21st century schooling, we need to re-think the traditional separation between classroom teaching and school administration and leadership. As these case studies will show, the role of administrators can shift in positive directions when teachers assume new leadership roles and the relations between teachers and administrators are significantly enhanced.

Expanding conceptions of teacher leadership as an individual calling to a systemic restructuring of the teaching profession

Much of the recent research literature on teacher leadership focuses on the attributes of teacher leaders and the personal and professional skills they need to lead their peers (Crowther, Kaagan, Ferguson & Hamm, 2002, Danielson, 2006; York-Barr & Duke, 2004). Katzenmeyer and Noble (2001) characterize teacher leadership as teachers' ability to influence their peers: "Leadership is influencing. Teacher leaders are approachable and influence primarily through their personal power. Relationships become the foundation upon which teacher leaders are able to share and learn from others" (p. 6).

Hess (2015) takes that definition further in his description of "cage-busters" as individual teachers who seek to solve one problem at a time and change culture by "influencing up." These individuals "recognize that earning influence and professional respect requires reshaping a profession that has accepted uninspired management and ineffectual routines for too long ... Cage-busters believe that 'teacher leadership' is a cheery, amorphous term that's only meaningful when it becomes concrete" (p. 17). He correctly points out that teacher leadership must incorporate power and authority, which is not always connoted in the term "teacher leadership."

Our research suggests, however, that we cannot rely on teacher leadership to occur organically or as an individual calling—the result of a teacher seeking to fill a void or influence willing colleagues. A more purposeful and systemic approach is needed to address the career aspirations of a new generation of teachers who want to be leaders from the classroom. Teacher leadership often gives voice to teachers, but rarely changes systems. Teacher career pathways are intentional and formalized through specific career options. In a teacher career pathway, teachers are made aware of leadership opportunities beginning early in their careers and provided with training in the skills, knowledge and dispositions necessary for leadership. Teacher career pathways that provide appropriate and adequate incentives, leadership training, and improved working conditions will help lead to a sustainable workforce of committed, talented educators who are more likely to produce desired and sustainable student achievement gains.



Structure of this report

This report presents our findings from seven on-site visits to different schools/school districts across the country that present different models of restructuring teachers' jobs and career paths. While some may not yet be fully articulated teacher career paths, they offer glimpses into the promise and challenges of advancing teachers' careers by providing leadership opportunities. In addition, we will also highlight the work of Public Impact in assisting the Charlotte-Mecklenburg Schools (CMS) in implementing the Opportunity Culture (OC) staffing model.

We begin with an overview of the teacher career models in the seven study sites as well as the OC model highlighted in this report. We then share what we have learned about the design features of different teacher career pathways, including teacher leadership roles, the selection process, opportunities for collaboration, compensation, professional development, peer coaching/peer evaluation, and teachers' voice in decision-making. We follow with what we have learned about the "enabling" conditions needed to launch and sustain teacher career pathways over time. These include pre-conditions or "readiness," sources of leadership, stakeholder involvement, school culture and funding sustainability.

We then summarize the trends and lessons learned, based on the evidence we found around the positive benefits of these initiatives, as well as issues and challenges for teachers and school districts. Finally, we share recommendations for schools and districts considering the implementation of new teacher career pathways.



Study Methods

The purpose of this qualitative case study is to investigate and document examples of teacher career continuum models and to develop recommendations for best practices in designing and implementing such models. We conducted site-visits in seven schools/school districts between 2013 and 2015 as follows:

- » Aspire Summit Charter Academy, Modesto, California—"The College Ready Promise (TCRP) Initiative"
- » Denver, Colorado—"Denver Differentiated Roles (DR) Pilot"
- » District of Columbia—"DC LIFT Initiative"
- » Knox County, Tennessee—"System for Teacher and Student Advancement (TAP) Program"
- » Scottsdale, Arizona—"Scottsdale Career Ladder Program"
- » Seattle, Washington—"Seattle Career Ladder Program"
- » Southeast Polk Community School District, Iowa—"Southeast Polk Teacher Leadership and Compensation Initiative"



Our research team collected on-site data, which included meeting with district program coordinators and conducting focus groups of principals engaged in the program and teachers representing the range of grade-levels and variety of roles along the career continuum (e.g., coaches, master teachers, etc.). The interviews and focus groups were recorded and transcribed, analyzed and coded by two independent reviewers. District policy documents and external evaluations or available impact data (e.g., teacher recruitment and retention data or teacher surveys) were also examined and incorporated into research reports for each study site, which has provided the basis for the information highlighted in this report.

Appendices A, B, C and D provide a more detailed description of the study methodology, as well as the interview and coding protocols.

PART I. Overview of Case Studies

Here we provide a brief overview of the teacher career initiatives included in our study:

Aspire Summit Charter Academy, Modesto, California— “The College Ready Promise (TCRP) Initiative”

- » **Background:** Summit Charter Academy is part of the Aspire charter management organization, which has 37 schools enrolling over 13,000 students in low-income neighborhoods in California and Tennessee. The teacher career path initiative is part of “The College-Ready Promise” (TCRP), the goal of which is to transform outcomes for low-income, minority students and to improve teacher effectiveness in order to get all students prepared for success in college and beyond.
- » **Funding:** A substantial portion of Aspire’s performance-based compensation system is funded through several federal grants, including the Teacher Incentive Fund and i3 development grant.
- » **Structure:** There are five career continuum stages within the career ladder: resident, emerging teacher, achieving teacher, highly effective teacher, and teacher leader. Designation of teachers across the career continuum and eligibility for leadership roles is based on the Aspire evaluation system. Teachers continue to teach full-time, while receiving substitute coverage to share practice and conduct peer observations.
- » **Compensation:** At the time of our study, Aspire teachers in leadership roles receive stipends—some for specific activities and others on an annual basis. A new compensation system is being phased in to institutionalize these career options and augment bonuses.
- » **Reported benefits of the Aspire career ladder program:** Reported benefits include opportunities for professional growth and collaboration, increased teacher effectiveness, more teacher voice in decision-making, increased job satisfaction, and increased principal effectiveness due to the creation of a true leadership team.
- » **Defining issues/challenges:** Challenges include providing adequate time for teacher leaders to manage all responsibilities and maintain a life balance between work and home. Note that this model includes an “opt-in/opt-out” option for recognized teacher leaders who can opt-out of a teacher leadership role in a given year, while preserving their right to “opt-in” in future years.

Denver, Colorado— “Denver Differentiated Roles (DR) Pilot”

- » **Background:** Denver began its pilot of the Differentiated Roles initiative in 2013. As of 2014-15, there are 93 schools and 240 Career Ladder Teachers (CLTs) participating. The goal of the district is that most schools will be participating as of 2017-18.
- » **Funding:** A 5-year Teacher Incentive Fund grant provides a portion of the funding, with general funds providing supplemental funding. The district expects to fold grant funding into its general school funding formulas.
- » **Structure:** There are two teacher leader roles: a team lead and a senior team lead. A team lead is a classroom teacher who receives released time for coaching, evaluating some components of a teacher’s evaluation, and leading instructional planning for a group of teachers. A senior team lead is responsible for the full breadth of the evaluation, as well as evaluating and coaching team leads in the building. Eligibility is based on teachers’ evaluation in the LEAP framework. There is considerable building-level discretion in structuring the teacher leadership roles, except for the evaluation component which is “non-negotiable.”
- » **Compensation:** Team leads receive a \$3,000 stipend; senior team leads receive \$5,000. Note that team leads are released to spend 50% of their time on coaching and evaluation work.
- » **Reported benefits of DR Pilot:** This initiative is part of a larger vision of reforming the Denver Public Schools to close achievement gaps and restructure teachers’ and administrators’ roles. This includes reducing the number of administrative, non-instructional roles and investing in teachers to lead effective instruction. There was generally very strong support expressed by teachers, team leads and administrators, who saw positive culture change and the benefits of a teacher-led initiative.
- » **Defining issues/challenges:** Challenges included ensuring building-level leadership to align cultures and expectations in schools and providing adequate released time for teacher leaders.

District of Columbia Public Schools— “DC Leadership Initiative for Teachers (LIFT)”

- » **Background:** DC LIFT was implemented in the 2013-14 school year. It builds on IMPACT, DCPS’s teacher evaluation system, and IMPACTPlus, a performance-based pay system in effect in 2009-10 that provided significant salary increases for highly effective teachers and bonuses for teachers in high-poverty schools.
- » **Funding:** IMPACT, IMPACTPlus and LIFT have been supported by federal grant funds (Teacher Incentive Fund and Race to the Top), but there are plans to absorb program costs into general staffing and operating budgets of schools as grant funds diminish.
- » **Structure and compensation:** Teachers are assigned a LIFT career ladder stage based on IMPACT teacher evaluation system scores, including observations, value-added growth data in tested subjects, and student growth goals. As they move up the career ladder, they become eligible for significantly increased compensation, reduced numbers of classroom observations under IMPACT, and enhanced leadership roles. District-based leadership opportunities are varied and can include serving in various roles, such as advising district leaders on key policy decisions, writing curriculum, or helping the teacher recruitment team select new teachers for the district. Examples of school-based roles include serving as an after school coordinator, dual language coach, and grade level or department chair. Eligibility for leadership roles is based upon teachers’ career stages, and teachers must apply and be selected for these positions.



- » **Reported benefits of DC LIFT and IMPACTPlus:** Benefits included positive impact on teacher recruitment and retention of effective teachers (particularly in high poverty schools); more opportunities for teachers to collaborate and support one another; and motivation for highly effective teachers to continue in the profession.
- » **Defining issues/challenges:** Challenges included some perceptions of unfairness of the IMPACT ratings system and financial incentives disproportionately going to Title I schools teachers. In addition, LIFT opportunities were only available to classroom teachers.

Knox County, Tennessee—

“System for Teacher and Student Advancement Program (TAP) Program”

- » **Background:** The Knox County Public Schools are long-time participants in the System for Teacher and Student Advancement Program (TAP™). Four schools initially participated in TAP in the 2006-07 school year, with the number of schools expanding to 18 in 2010.
- » **Funding:** The Great Schools Initiative funded the first four schools participating in TAP; in 2010, Knox County received additional funds to expand the initiative from the National Institute for Excellence in Teaching (NIET) through the federal Teacher Incentive Fund.
- » **Structure:** There are four stages of career development—career teachers, mentor teachers, master teachers and executive master teachers. Teachers are chosen through an extensive application process, including evidence of instructional effectiveness.
- » **Compensation:** Master and Mentor teachers receive stipends ranging from \$2,500 to \$6,000, with additional compensation for an additional 11 and 21 contract days.
- » **Reported benefits of TAP:** The TAP Attitude Survey showed high levels of support for the five TAP program components (multiple career paths, instructionally focused accountability, teacher collegiality, ongoing applied professional growth, and performance-based compensation). Recruitment of teachers from selective universities and of National Board certified teachers has increased in TAP schools, although turnover at the school level has increased due to TAP teachers leaving for promotions within the district. A recent study indicates that 12 of the 14 TAP schools in Knox County show significantly more than one year of student growth on state assessments.
- » **Defining issues/challenges:** Challenges include high teacher turnover at the school level due to promotions or teachers moving out of TAP schools; significant demands on principals in TAP schools, as well as on mentor teachers (particularly at the elementary level); and district uncertainty in its ability to fund TAP in the absence of TIF grant funds.

Scottsdale, Arizona—

“Scottsdale Career Ladder Program”

- » **Background:** The Scottsdale Career Ladder Program (SCLP) was first implemented in 1994, but is being involuntarily phased out in 2015 due to a lawsuit challenging the constitutionality of Arizona Career Ladder Program funding, which restricted new districts from participating due to inadequacy of state funds.
- » **Funding:** Over time, Scottsdale's program became funded primarily from local funds (a local tax levy); however, loss of state funding made continuation difficult.
- » **Structure:** There are four career ladder stages, with placement determined by successful evaluations, documentation of student progress, and higher level teaching responsibilities (including staff development). Peer evaluation is a component of the SCLP.

- » **Compensation:** The salary schedule is based on placement in career ladder stages, which provides pay for performance and leadership activities.
- » **Reported benefits of SCLP:** Benefits included incentives to recruit and retain teachers; improved teacher effectiveness; improved administrator effectiveness; and positive school culture (high expectations, teacher collaboration, shared responsibility for student learning).
- » **Defining issues/challenges:** Challenges included the phase-out of the program, resulting in the loss of teachers to other districts and a perceived lack of appreciation and respect for their work, as well as uncertainty of whether a collaborative culture will continue to be maintained.

Seattle, Washington— “Seattle Career Ladder Program”

- » **Background:** The Seattle Career Ladder Program was launched in 2011-12 with 11 schools and 28 career ladder teachers. As of the 2014-15 school year, 82 schools and 210 teachers were participating. As of 2015-16, 94 of 97 schools are participating.
- » **Funding:** In 2010, Seattle was awarded a \$12.5 million TIF grant to fund a major overhaul of its teacher evaluation system and to fund leadership development, including the Seattle Career Ladder Program. The program is now fully funded through school baseline dollars.
- » **Structure:** There are three site-based career advancement opportunities in the Seattle Career Ladder Program: demonstration teacher, mentor teacher, and master teacher. Career Ladder Teachers (CLTs) retain their primary role in the classroom while providing professional support and guidance to other certified teachers. CLTs may also serve in hybrid roles, such as a combined mentor/demonstration teacher role in which roles and responsibilities as well as the stipend are shared. These hybrid roles emerged from the need for flexibility at the building level in order to fit the needs and organization of the school.
- » **Compensation:** Demonstration teachers receive an annual stipend of \$2,500; mentor teachers, \$3,500; and master teachers, \$5,200.
- » **Reported benefits of Seattle Career Ladder Program:** Benefits included more opportunities for collaboration and coaching, more collegial interaction, the opening up of career options for teachers, and a positive impact on teacher recruitment.
- » **Defining issues/challenges:** Challenges included a lack of time for collaboration among CLTs or for CLTs to fulfill all their responsibilities, as well as building trust so that teachers accepted their peers in leadership roles.

Southeast Polk Community School District, Iowa— “Southeast Polk Teacher Leadership and Compensation Initiative”

- » **Background:** The Southeast Polk Teacher Leadership and Compensation (TLC) System was in its first year of implementation as of 2014-15—one of 39 districts awarded grants during year one of the Iowa Teacher Leadership and Compensation Initiative. SEPCSD is a regional school district, serving suburban and rural towns outside of the Des Moines metropolitan area.
- » **Funding:** Funding is provided through a three year grant in connection with Iowa 2013 Education Reform Legislation. It is expected that program costs will become part of the statewide education funding stream after three years and that all schools in Iowa will have some form of teacher leadership program in place by the end of this time period.



- » **Structure:** The TLC system is an Instructional Coach Model, with three teacher leadership roles for career teachers: model teacher, instructional coach and curriculum and professional development leader. Twenty-five percent of SEPCSD teaching staff have new leadership roles. Teachers are chosen through an extensive interview and application process.
- » **Compensation:** Stipends for the three new leadership roles range from \$2,000 to \$12,000, covering 5 to 15 extra contract days.
- » **Reported benefits of TLC Program:** Although the program has only been in effect for less than one year at the time of this study, there has already been a noticeable shift in the district culture, with more opportunities for teacher collaboration and coaching and job-embedded professional development, as well as positive changes in the principal's role and workload.
- » **Challenges:** Challenges include the need for better definition of the "model teacher" role and the "buy-in" of veteran teachers.

Charlotte-Mecklenburg, North Carolina— "L.I.F.T. Opportunity Culture Initiative"

In addition to our seven case study sites, the following is a summary of the Charlotte-Mecklenburg Schools (CMS) "Opportunity Culture" (OC) initiative, the study of which was conducted by our partner organization, Public Impact.⁴

- » **Background:** CMS's OC initiative began with a pilot in Project L.I.F.T. (Leadership and Investment for Transformation), a public-private partnership to improve academics in historically low-performing, high-need schools. Project L.I.F.T. operates as a "district within a district" in the Charlotte-Mecklenburg Schools, with its own superintendent and human resources personnel. Four Project L.I.F.T. schools began implementation of the OC Initiative in the 2013-14 school year with four schools. In 2014-15, 16 additional schools began implementing the OC initiative, including 15 in the wider district. In 2015-16, CMS has expanded the OC models to a total of 23 schools, with another 8-10 planned for 2016-17.
- » **Funding:** Initial transition costs were funded by foundations and the district to implement the OC models in schools. The initiative is designed so that the higher pay for advanced roles is funded by reallocating staffing funds within the school's own allocated budget, resulting in zero additional grant or external funds required over time. This is accomplished by exchanging the funding for certain teacher specialist roles, teaching positions and/or teaching assistant positions for supplements paid to teachers in new "extended reach" leadership roles.
- » **Structure:** CMS created two kinds of roles for teachers designated as "highly effective" or "excellent": (1) a multi-classroom leader (MCL) who leads a team including one or more other teachers, while remaining in the classroom and being accountable for the team's teaching and student outcomes; and (2) direct reach teachers, such as blended-learning teachers, who work with students online to master basic skills and focus in-person instruction on personalized, higher order learning, and elementary specialized teachers, who teach one or a pair of subjects (e.g., math/science or language arts/social studies) with support from other teachers and paraprofessionals. Some L.I.F.T. schools have an additional role called an

⁴ The information presented in this report was gathered from multiple sources included memoranda and interviews with Public Impact staff and correspondence between the research team, Public Impact personnel and the Director of the L.I.F.T. OC Initiative in the Charlotte-Mecklenburg, NC schools. Public Impact provided materials based on their site visits, interviews, teacher perception surveys, and student data analyses.

expanded impact teacher, who plans and delivers instruction for multiple classes with assistance from a paraprofessional so the expanded impact teacher can focus on personalized, enriched instruction.

- » **Compensation:** Teachers receive additional pay over their district salaries. Multi-classroom teachers (MCLs) receive \$13,000 to \$23,000 depending on the numbers of students reached and teachers on the leader's team. Direct reach teachers earn supplements ranging from \$6,000-\$9,800. Members of MCL-led teams can earn supplements of \$1,500. Some OC paraprofessionals also earn a special supplement.
- » **Reported benefits of CMS OC Initiative:** Benefits include hundreds of applicants for OC positions in hard-to-staff schools when recruitment starts in March. Teachers cited that OC roles offered opportunities for leadership without leaving the classroom, significantly more pay for more responsibility, and the creation of a culture in schools that truly elevates the teaching profession. Preliminary data from L.I.F.T. schools in their second year of implementation indicates that students in OC classrooms were 42-70% more likely to achieve high growth and 50% less likely to achieve low growth than students in non-OC classrooms and schools.
- » **Defining issues/challenges:** In schools transitioning gradually, challenges include changing schedules so that OC teachers have enough time at school to accomplish their responsibilities. In all schools, challenges arose in matching team leader evaluations to their new, expanded roles.

Appendix E provides a comparison of major features of the seven Career Pathways study sites and the complementary case study of the CMS OC initiative. These will be examined in more detail in the following sections.



Part II. Design Features of Teacher Career Advancement Initiatives

Our analysis of the case studies led us to identify six important elements of teacher career advancement initiatives that need to be addressed in the design phase of an initiative. These include:

1. teacher leader roles, eligibility criteria and the selection process;
2. opportunities for collaboration/released time;
3. compensation;
4. peer coaching/peer evaluation;
5. professional development for teachers and teacher leaders; and
6. teacher voice in school leadership.

Teacher leader roles, eligibility criteria and the selection process

“We can see the benefits of a teacher who is being celebrated. People are coming into her room to see what she does. And it gives us the opportunity to go see what someone can do really well, so lots of ideas. And our instructional coaches are kind of the middle ground between the principal, somebody to go to before intervention is needed for some people. But I think it’s completely changed the way that we see our profession.” —Southeast Polk teacher leader

“I knew in a flash that this new [multi-classroom leader] model would bring me my dream job... a teacher who continues to teach while leading a team of teachers, taking accountability for the results of all students served by the team, with plenty of school-day time for planning and collaboration—and much higher pay.” —Charlotte-Mecklenburg Schools teacher leader

The variety of teacher leader roles and titles we observed in our various study sites is extensive. Some teacher leader titles are defined by career stages (such as “entering,” “emerging,” “effective teacher,” “highly effective teacher,” and “master leader” in the Summit Charter Academy or “professional level 1,” “professional level 2,” and “professional level 3” in Scottsdale Career Ladder Program). Others are designed by function (such as “demonstration teacher,” “mentor teacher,” and “master teacher” in the Seattle Career Ladder Program; “team lead” and “senior team lead” in the Denver Differentiated Roles Pilot; and “model teacher,” “instructional coach,” and “curriculum coach” in Southeast Polk). In the DC LIFT initiative, teacher leader roles are very specifically related to certain district- or school-based functions (advising district leaders, writing curriculum, grade-level or department chair, etc.).

In general, the functions served by teacher leaders break down into the following categories. A particular teacher role may blend more than one of these functions:

- » Peer coach (co-plans, observes classrooms of colleagues including conducting pre- and post-observation conferences, and provides formative feedback)
- » Peer evaluator (observes classrooms of colleagues and provides input into the evaluation of the teacher, usually in conjunction with the principal)

- » Demonstration/model teacher (serves as a role model for other teachers by opening his/her classroom to colleagues to observe instruction)
- » Mentor/coach (provides support to new or struggling teachers as well as experienced teachers)
- » Lead/master teacher (co-teaches, mentors teacher leaders, leads a teacher team or assumes responsibilities suitable to an advanced role in a teacher's career)
- » Curriculum, instruction or assessment specialist (helps colleagues to understand student academic standards, follow district curriculum standards and develop aligned standards)
- » Data coach (helps teachers to interpret student data and identify appropriate instructional strategies to address)
- » Department/content/grade-level chair (acts as a liaison between principals or other administrators and colleagues, which may include instructional or administrative duties)
- » Hybrid teacher-leader (teaches part-time while also assuming other roles that support teachers, such as curriculum or assessment design, coaching, or mentoring)
- » Multi-classroom leader (leads a team of teachers, co-planning, co-teaching, and providing on-the-job professional development, with accountability for the team's student outcomes).

Some teacher leader roles offer a career progression from one role to another based on growing expertise and responsibilities. For example, in Denver, teachers start as a team lead who is responsible for components of a teacher's evaluation and is provided with released time to coach or evaluate a group of teachers and lead instructional planning and data teams. They can then move to a senior team lead position, which encompasses responsibility for the full breadth of a teacher's evaluation, as well as for evaluating and coaching the team leads within the building. In Southeast Polk, there is a three tiered career progression beginning, with a model teacher (who demonstrates lessons and strategies to other teachers while teaching full-time), then a building-level instructional coach (who is released full-time to provide conferences, observations and development sessions to colleagues), and finally, a curriculum and professional development leader at the district level (who works with new and experienced teachers in curriculum and other district-based initiatives). Similar models operate in Scottsdale, Knox County and Seattle. CMS enables teachers to move up to higher levels of both multi-classroom leadership (MCL), by leading larger teaching teams, and direct reach, by mentoring peers in instructional planning and differentiation without assuming the full leadership role of an MCL.

In some districts/schools, such as the Summit Charter Academy and DCPS, teachers can assume a variety of leadership roles or multiple leadership roles depending upon their designation and opportunities at the school or district level. In districts such as Seattle, building level principals can merge roles (such as a demonstration and mentor teacher) based upon the specific characteristics and needs of the building. Some flexibility in designating roles is also available in the Charlotte-Mecklenburg OC model, in which schools are given the frameworks for positions, such as the multi-classroom leader, but are allowed to modify the roles subject to approval by the district administration. Denver chose to define the team lead roles at the school site and eliminate district leadership roles across multiple schools. One team lead noted, "I do think there's an understanding and awareness that we've built out of this team lead role. We have a sense of what it is and what it can do, now what are the appropriate complementary teacher leadership roles, so we do start to build out a pathway."



Whatever the role, it is critical that it is defined clearly, with transparent eligibility criteria aligned to the job description, or teachers can be subject to what one teacher described as “mission creep.”

Whatever the role, it is critical that it is defined clearly, with transparent eligibility criteria aligned to the job description, or teachers can be subject to what one teacher described as “mission creep.” A Seattle career ladder teacher observed, “You just get spread too thin and especially when administration piles on. Oh, you’re going to be on this professional development committee which is going to meet every other week on top of the building leadership team, on top of leading your own PLC. It becomes you’re one of five people that are doing everything in the school and that’s not the point of the role.” Seattle and Denver teacher leaders and administrators explained how flexibility in defining the roles enabled them to fit the role to the context of the school; however, the lack of the clear descriptions may have contributed to an initial reluctance of teachers to work with the teacher leaders.

A critical dimension of ensuring the credibility of the selection process for leadership roles or a designated career ladder stage is defining baseline eligibility of teachers for these roles. Attaining “excellent” or “highly effective” status (or some other performance measure of competence) is a universal standard among the research sites we studied. The majority of districts/schools in this study based eligibility for teacher leader roles on designations of excellence from their teacher evaluation system, which included measures of student achievement or growth as the major criterion in designating eligibility. An exception is Southeast Polk, which makes the various teacher leadership positions available to any teacher with a standard license and at least one year in the school district. The district relies instead on a rigorous selection process, described below, to determine expertise in instruction along with other qualifications for the various teacher leader roles.

Whereas eligibility criteria are generally consistently applied and well-defined, the actual selection processes vary significantly by district. Most involve an application, interview, and recommendations by the principal. Denver asks candidates to view a video and give feedback to the highlighted teacher. One principal noted that it was a competitive process that included model lessons and role-playing, with teachers taking a major role in the selection. Master teacher candidates in Knox County are interviewed by a district panel and must show their effectiveness scores and teach a lesson, as well as demonstrate coaching skills. Southeast Polk uses a site-based selection team, requiring a committee of two district administrators and the president and vice president of the teachers' union. In addition, each school team includes the school principal and at least one teacher, with additional administrators and teachers often involved. In the early stages of a teacher career initiative at some sites, there were sometimes not enough applicants to justify an interview process, but this problem usually disappears after the program has been in effect and its credibility established. In other sites, such as the early OC sites in CMS, all schools were able to be highly selective. This created a new challenge, though, since most schools and districts did not have capacity to select teachers with a large volume of applications from teachers coming from multiple states.

What we've learned:

- » Teacher leader roles can increase the systemic impact of highly effective teachers by strengthening teaching and learning through collaborative work among teachers.
- » Teacher leader roles in career pathways must fit the context of the district and school's goals and initiatives, talent pool, student needs and organizational structures.
- » Teaching excellence (using some form of objective measures of teacher effectiveness) plays a critical role in determining eligibility for teacher leader roles and assuring the credibility of those teachers selected for those roles.
- » Involvement of teachers in the selection process, as well as transparency and alignment between the role description and the selection criteria, eliminates confusion and develops trust among those selected for teacher leadership roles and their colleagues.
- » When there is flexibility in defining teacher leader roles at the building level, clear descriptions of these roles must be developed and made public.

Teaching excellence (using some form of objective measures of teacher effectiveness) plays a critical role in determining eligibility for teacher leader roles and assuring the credibility of those teachers selected for those roles.

Opportunities for collaboration/released time

"...most critical for us was that we cannot call someone with full release time a teacher leader. It's saying no, let's put our foot down and say they must be teaching to make them a true teacher leader, and we will prioritize release time for these people."—Denver DR Pilot director

"...along with the time, finding the balance. I have three little kids and a husband and wanting to make sure that I'm not [just] an excellent teacher for my class...and there's a very positive pressure to take on responsibilities and it is all choice, but...is this the best decision for me as a person and for everything that I'm a part of?"—Aspire Summit Charter Academy teacher leader

"I have lasted three years ... But staying until five, six o'clock at night. Going home, working on evaluations that I've done this week. So it's massive. It's overload."—Knox County mentor



In the majority of the career ladder positions such as demonstration or mentor teachers, teachers have full-time teaching responsibilities plus additional responsibilities and are provided with some release time. Many teachers want this combination. One CMS teacher assuming a multi-classroom leader role blogged that in a prior role as a professional development facilitator, “I was missing the classroom a lot, yearning for that daily impact on scholars. And I didn’t like how this [prior] position took me completely away from those who affected me on a daily basis, my scholars.”⁵ CMS teachers in hybrid roles also report that continuing to teach gives them even more credibility with the teachers on their teams.

In contrast, master teachers (Knox County), peer evaluators (Scottsdale), and instructional coaches and curriculum and professional development leaders (Southeast Polk) do not have direct teaching responsibilities. Some districts, such as Denver and Charlotte-Mecklenburg’s OC schools, have created “hybrid roles,” in which teacher leaders teach part-time and do coaching, evaluation or multi-classroom leadership work for 25% or more of their day. Southeast Polk wrestled with this issue and decided that full-time coaches would be more effective. One principal explained the district’s decision to create 21 full-time coaches: “I think, at this stage of our process, wow, did we make the right decision? Kind of doing half and half really means two full-time jobs, and how do you really do it?”

Time management is a challenge for teacher leaders who are full-time teachers. A Seattle CLT who was allocated with one period for coaching commented, “the minute they knew that I had a free period now to do this job it was like I can’t stop [colleagues] from coming ... I do think it would be much improved if there were time within our work-day.” In particular, teacher leaders who are in coaching roles need time to plan, conduct pre- and post-conferences, observe, and provide feedback. This is often in addition to other responsibilities such as co-teaching, providing professional development for colleagues, attending meetings with building-level leadership teams, and participating in leadership training. Being released full-time from classroom duties enables them to provide timely assistance to colleagues. On the other hand, being released full-time means that teacher leaders may lose the closeness of classroom teachers with students and instruction. In order to prevent this from happening, peer evaluators in Scottsdale were assigned on a three-year rotational basis, returning to the classroom at the end of their assignment.

When teachers do not have time allocated in the day for their additional leadership responsibilities such as mentoring or coaching, they have limited time to work with their peers. Teachers may need to use their preparation time, lunch time, and time before and after school to meet with their coach or mentor. Life balance becomes a challenge. Additionally, there is more turnover in teacher leader positions.

Time management is a challenge for teacher leaders who are full-time teachers.

On the other hand, being released full-time means that teacher leaders may lose the closeness of classroom teachers with students and instruction.

⁵ Bobby Miles (2015). “1 Teacher, 400 Scholars -- and Loving It,” Real Clear Education commentary (July 15). Retrieved September 2015 from: http://www.realcleareducation.com/articles/2015/07/15/1_teacher_400_scholars_-_and_loving_it_1209.html

As an example of strategies that help provide more “balance” in the lives of teacher leaders, the Summit Charter Academy includes an “opt-in/opt-out” option for recognized teacher leaders that mirrors Deloitte’s Mass Career Customization model (Benko & Weisberg, 2008). Recognized teacher leaders at Summit can choose whether to serve as a teacher leader in any given year. If personal obligations don’t allow for participation, the teacher leader has the flexibility to opt-out of the teacher leader role that year, while preserving their right to opt-in in future years when personal demands are lessened. As another example, design teams in CMS OC schools focus heavily on scheduling to give teacher leaders and their teams in-school time for planning, collaboration, and development.

What we’ve learned:

- » Teacher leaders are more likely to be sought for support when they have allocated daily time to work with their colleagues.
- » Timely, in-depth conversations between teacher leaders and peers are more difficult if they do not occur on a timely and regularly scheduled basis during the school day.
- » Hybrid teaching/coaching roles may offer a viable alternative to full-time teaching or full-time coaching options.
- » Giving teachers “opt-in/opt-out” options as well as a deliberate scheduling of teacher leader and team time may be viable options for balancing the responsibilities and time commitments of leadership roles.

Compensation

“...we don’t make that much extra money by being Career Ladder teachers...essentially everyone’s saying they’re doing this work anyways. I think we’re Career Ladder teachers not in it for the money, I think we’re in it because we want to be stronger teachers.”—Seattle career ladder teacher

“Coming from a district that didn’t have it, I felt valued because I was getting monetary payments for my excellence, which I wasn’t getting prior to that. So it was the definite positive reward for me to perform.”—Scottsdale career ladder teacher

“When our school became a pilot Opportunity Culture school and I was offered the job of a multi-classroom leader (MCL), I had to pinch myself to make sure I wasn’t dreaming. ...I earned 35 percent—\$16,000—more. It is a significant bump, one that made me feel more respected as a professional...”—Charlotte-Mecklenburg Schools teacher leader

Daniel Pink (2009) distinguishes between Type I and Type X personalities. For Type X, the main motivator is external rewards, with any deep satisfaction welcome, but secondary. For Type I individuals, “the main motivator is the freedom, challenge of the undertaking itself; any other gains are welcome, but mainly as a bonus” (p. 78). One can certainly argue that teachers, in general, do not go into the profession for its financial gains, and most teachers fall into Pink’s “Type I” category. The motivation for most of the teacher leaders we interviewed lies in the positive impact they see on their students, the opportunity for collaboration with colleagues, and the feeling that they are appreciated and supported.



Nonetheless, increased compensation for teachers deemed highly effective and for taking on additional roles suggests it is an important motivator for teachers to be attracted and retained in the teaching roles and to be motivated to teach in high needs schools. In the DC Public Schools, for example, there has been a very conscious effort to use compensation policy to attract high performing teachers to teach in high poverty, low performing schools (called 40/40 targeted schools), where they can receive an annual bonus of up to \$20,000 based on their LIFT career ladder level. The potential salary bonuses place their compensation higher than what they would otherwise receive in a more affluent school. Besides additional compensation, the benefits of moving up the DC LIFT career ladder include eligibility for a reduced number of observations under the IMPACT evaluation system and opportunities for leadership roles at the school and district level. Additional stipends for some school-based roles are established in the Washington Teacher’s Union contract. In the Charlotte-Mecklenburg OC schools, pay supplements for advanced roles range from \$6,000 to \$23,000 and average approximately \$10,000, depending on the role and how many students and colleagues are “reached” by the excellent teacher.

Increased compensation for teachers deemed highly effective and for taking on additional roles suggests it is an important motivator for teachers to be attracted and retained in the teaching roles and to be motivated to teach in high needs schools.

Compensation for teacher leaders varies significantly based on the role of the teacher leader, the time for which teachers are released to perform their responsibilities, and available funding. In general, teachers who continue to work as full-time teachers receive modest stipends to cover after-school and summer work, but no compensation for additional work in the school day. Those teachers who are released full-time to serve as instructional coaches or curriculum/professional development leaders receive more sizeable stipends, but that is often to cover additional contractual days during the summer. Stipends were often limited due to budgetary constraints. One administrator in Knox County observed, “Some might say [the stipends are] probably not enough ...I think the cost/benefit under \$3,000 and \$5,000 [means] it still pays more to go become an administrator.”

Table 1: Compensation for teacher leaders by initiative

| | |
|-------------------------------|--|
| ASPIRE Summit Charter Academy | Lead teacher: \$2,500 Other roles: \$1,000-\$1,500 |
| DC Public Schools | LIFT salary schedule provides bonuses for highly effective teachers: in high poverty schools, up to \$20,000; in non-Title I schools, up to \$3,000. ⁶ Extra pay for LIFT leadership roles varies by specific role, with most roles falling in the \$1,500 to \$5,000 range. |
| Denver | Team lead: \$3,000 stipend Senior team lead: \$5,000 stipend Non-DR roles: \$1,000 stipend |

⁶ Note that gauging the impact of additional pay for DC teachers assuming leadership roles is difficult as the overall LIFT salary schedule provides significant bonuses to high performing teachers in high poverty schools, whether or not they assume leadership roles at the school or district level.

Table 1: Compensation for teacher leaders by initiative

| | |
|--------------------------|--|
| Knox County | Mentor teacher: \$2,500 stipend plus payment for 11 additional contract days (Total \$4,000-\$4,500) Master teacher: \$6,000 plus additional 21 contract days (\$10,000-\$12,000) |
| Scottsdale | Salary schedule incorporates a point system-based compensation schedule for teachers with “Higher Level Teaching Responsibilities,” with increments up to \$4,000 |
| Seattle | Demonstration teacher: \$2,500 stipend Mentor teacher: \$3,500 stipend Master teacher: \$5,200 stipend |
| Southeast Polk | Model teacher: \$2,000 incl. 5 extra contract days Instructional coach: \$7,000 incl. 10 extra contractual days Curriculum and PD leader: \$12,000 incl. 15 extra days |
| Charlotte-Mecklenburg OC | Multi-classroom teachers: \$13,000 to \$23,000 depending on the numbers of students reached and teachers on the leader’s team Direct reach teachers: \$6,000 to \$9,800 |

What we’ve learned:

- » An important purpose of differential compensation is to attract excellent teachers to schools, recognize and reward teachers for their expertise, and keep high performing teachers from leaving the classroom.
- » When there is adequate released time, training and support to perform their leadership roles, additional compensation may be less critical to teacher leaders.
- » When teachers have to work outside of the school day, stipends need to be significant enough as an incentive to forgo time with family, other activities or outside employment, or to compensate for expenses such as childcare.
- » Increased compensation for teachers in leadership roles is validating for the acceptance of new responsibilities. Perceived equity of compensation structures is critical to the acceptance of teachers in new leadership roles.

Perceived equity of compensation structures is critical to the acceptance of teachers in new leadership roles.

Peer coaching/peer evaluation

“Probably the most growth that I got as a teacher was having another teacher observe me and help me learn how to be a better teacher versus an administrator, who is more removed from the classroom, I feel. So having peer evaluators was an amazing experience for me, with the opportunity too to write [Student Progress Assessment Reports] spring boarded my success in being able to pass my national boards.”—Scottsdale teacher

“I’ve told so many people that they need to be mentor teachers because just what you learn about yourself is much. I feel like I’ve gotten more back from doing it than I’ve given to my people that I coach.”—Knox County mentor teacher



The line between peer coaching and peer evaluation is not always distinct in some districts.

“I would describe the historical beliefs of our educational system that no, coaching and evaluation, these things don’t live together, these things have to live [separately]...these are two things that make sense when they’re together when you’re very intentional about why they live together, and then ensuring that we have the right support...in place for these team leads, who are the center point of coaching and evaluation living together.”—Denver administrator

The most common role of teacher leaders in career pathways initiatives is to provide coaching and support to new teachers as well as peers. In some instances, the coaching is more informal, with demonstration or model teachers opening their classrooms to peers to showcase lessons and instructional strategies. In other cases, such as Denver and CMS, coaching comes through team leadership, in which teacher leaders take responsibility for teams of teachers with whom they can work every day during school hours. In other districts, such as Seattle, Summit Charter Academy, Southeast Polk, and Knox County, mentor teachers or peer observers conduct classroom observations for purposes of providing coaching and feedback, although the principal retains primary responsibility for evaluation.

The line between peer coaching and peer evaluation is not always distinct in some districts. There is tension between the role of the teacher as coach/mentor and the peer evaluator. It takes time, transparent role descriptions, and frank conversations to build the trust for the peer coach to establish relationships. A Southeast Polk instructional coach commented that, “Getting the teachers past the mindset that coaching is not evaluation, that coaching is about making them grow and not keeping track of them or doing checkpoints on them is a big issue.” In the Denver Differentiated Roles Pilot, peer coaching is merged with peer evaluation, which has created the greatest challenge

to the culture of schools. Team leads are responsible for components of a teacher's evaluation and coaching a group of teachers, with senior team leads responsible for the full breadth of a teacher's evaluation. In contrast, Seattle's collective bargaining agreements clearly distinguish the line between evaluation and support, so the Career Ladder program has no peer evaluation component.

What we've learned:

- » Coaching benefits both the mentor and mentee in terms of promoting practices that lead to increased instructional effectiveness.
- » Adequate time for collaboration and coaching is critical and a significant issue for coaches who retain responsibility for their own classrooms.
- » The availability of a coach to provide "on-time" coaching was perceived as more effective than waiting for assistance during a scheduled professional development day or after school.
- » In those districts that merged peer evaluation with peer coaching, there was evidence of strong district leadership and support from major stakeholders in the district, including strong association/union support. In addition, in order to build a culture that successfully dealt with the tensions between coaching and the consequences of evaluation, it was critical that the evaluation system was transparent and conducted by well-trained peer evaluators and time provided for staff to adjust to these changes.

Professional development for teachers and teacher leaders

"It makes sense the coach is driving the PD ... Obviously, our principals are also involved, but it makes sense that a fellow teacher, who's with the kids constantly, seeing the data constantly, is the one that's driving the PD."—Southeast Polk teacher

"I've participated in cognitive coaching which has been offered through the district and that has been—there's not even a close second—that's been the best training that I've gotten since I've been in DPS, the best professional development."—Denver Team Lead

"I thought the reflection phase of the rotation would be kind of a blow-off, and that it wasn't going to be so meaningful. But it turned out I didn't reflect as much as I thought I did, and the reflection phase really forces you to do that."—Scottsdale teacher commenting on the cognitive coaching and reflection cycles of the district evaluation model

Professional development is an integral component of all the teacher career pathways initiatives we studied. It has multiple dimensions: the embedded professional development provided to teachers through collaborative activities such as observing each other's classrooms, the sharing of practice among peers, and training of teacher leaders for coaching and instructional leadership roles.

One of the changes in professional development at these sites is that the teacher leaders have more voice in the selection, design, and delivery of professional development opportunities. Strategies include modeling, looking for resources, co-teaching, providing workshops, co-planning, conducting observations, visiting classrooms, and holding professional conversations. One teacher in Southeast Polk noted, "We can take our PD initiatives that were once a month or once a week and make them a reality every day and apply it, and get teacher leaders in the classroom to model lessons and co-teach, and just have those professional conversations with our teachers." In DC, master educators



regularly assess teacher practice through classroom observations. They provide targeted, content-specific feedback to teachers, provide extensive support to new teachers, and lead content-specific collaborative learning cycles for teachers across the district. In Knox County, one beginning teacher commented about what ongoing embedded professional development delivered by a peer coach meant to her: “As a first-year teacher, it was great for me to have constant support, constant leadership coming in, showing me what to do. I wasn’t just there on my own. I had people showing me, which was great. And I feel like my kids benefitted from that.”

The content of professional development for teachers, as well as for training teacher leaders, is predominantly driven by the evaluation model and instructional rubrics that identify strengths and gaps in instruction, as well as what is needed to enable teachers to move to a higher level of performance and/or career stage. In Denver, for example, team leads are provided with training in the framework for the LEAP evaluation, how to use that framework, and cognitive coaching. In the Scottsdale Career Ladder program, staff development is built into the Professional Growth Component of the Higher Level Teaching Responsibilities activities. Career ladder teachers must log in their activities that contribute to the improvement of curriculum and instruction, student affective growth, teacher professional growth, and/or a collaborative environment. The rotation model used in the evaluation of teachers includes a cognitive coaching and reflection cycle. Scottsdale teachers were also given opportunities to give workshops to teachers in other schools on how to write student growth pieces, differentiate instruction, and conduct action research. A Scottsdale teacher explained that she learned from being an evaluator: “Peer evaluators believed they improved their teaching by observing and learning from other teachers and viewed their role as ongoing professional development for themselves.” In the Summit Charter Academy, teachers are offered opportunities to engage in professional development through collegial class visitations, access to videos of high-performing teachers, and collaborative activities.

The skills and knowledge required for teachers assuming leadership roles can differ significantly from those required for classroom teachers. Public Impact (2015) recently released its analysis of the early implementation of the Opportunity Culture model in schools like the Charlotte-Mecklenburg OC schools. One observation was that, “[Multi-classroom leaders (MCLs)] rarely have formal leadership experience, and typically do not yet have the management tools or skills to organize and lead a team. Exit slips and interviews revealed that many of the earliest MCLs lacked awareness of their primary function and key responsibilities within a team, and they struggled initially to secure the support of their team members.” Even when training is provided to teacher leaders, it needs to be delivered prior to stepping into leadership roles. One Southeast Polk instructional coach lamented that the delay in coaching strategies training led to many frustrations. “[We] went to this training in November, and I was like, ‘Oh! I’m going to have to go back. I have to change ... I’m going to change everything! Everything I’ve done in the last two months I would like to undo and start over!’ And telling that to adults is very different than students.”

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What we've learned:

- » Professional development is viewed by teachers as being more effective when consistent, timely and embedded in the district's curriculum, instruction and assessment system and delivered through collaborative teams of teachers.
- » Professional development becomes more differentiated and relevant when it is designed and delivered by teacher leaders who have a deep understanding of instruction.
- » Teacher leaders need opportunities with other teacher leaders to improve their leadership skills.
- » Specific training for teacher leaders around their specific leadership roles and the related competencies they need is critical for their effectiveness and acceptance by their peers.
- » Professional development for teacher leaders should be provided prior to stepping into leadership roles and scheduled so that it neither interferes with their classroom teaching responsibilities nor relies too heavily on additional time requirements after school.

Teacher voice in school leadership

"I think that one of the reasons that our program has been very successful is because we've really listened to our staff every step of the way and so all of our differentiated role team leads are very happy. Nobody's leaving their position; everything is staying exactly the same for next year, which we're really excited to go into year two without any changes. Of course there will be minor changes, but no major changes."—Denver teacher

"I get to an issue or a problem where I'm really stumped ... [as to] where do I go from here and almost always someone has a great idea or a twist. I ask, 'Have you thought about this or have you tried this?' I'm so appreciative of having a team who are talented, dedicated...they're as highly educated as I am, and it's nice to have a team of leaders to go to and work with as a resource."—Summit Charter Academy principal

"I'll [say] this as [nicely] as I can: I think that people can give the appearance of really listening to people's opinions. And on the backside of it you don't know if it ever amounted to anything. I think people actually get heard in a TAP structure."—Knox County teacher

In the teacher career initiatives we studied, teachers exerted their influence in different ways and in different contexts. The DC Public Schools were very purposeful that LIFT be explained, promoted and championed by teachers. Approximately 60 teachers were recruited to serve as LIFT ambassadors to provide support and feedback on the program. In addition, some of the LIFT leadership roles offer teachers the opportunity to participate in district-based leadership roles, such as serving on the Chancellor's Teachers' Cabinet. In the Denver Differentiated Roles pilot, one teacher commented that teachers were drawn to the team lead role because they see a problem and want to have a major influence in shaping it. In Southeast Polk, the district has historically made it a priority over time for teachers to have a voice in many school-based decisions, with the TLC program adding to these opportunities. Teachers in the Summit

In the Denver Differentiated Roles pilot, one teacher commented that teachers were drawn to the team lead role because they see a problem and want to have a major influence in shaping it.



Charter Academy are frequently asked to provide input in implementation of the Aspire Career model, as well as in the day-to-day operations of the school. At Knox County's Teacher Leadership Team meetings, everyone participates in discussions and, occasionally, votes are held to make decisions. As one teacher commented, "It's truly more of a community than just...a monarchy." Each CMS OC school has a design team made up mostly of teachers who decided what advanced roles to include in the school's staffing model, how to shift the school budget to pay for advanced roles, and how to create schedules allowing time for planning, collaboration and development. Some of the OC schools have adopted a "team of leaders" approach, with multi-classroom leaders acting as close advisors to the principal and assistant principal to lead instruction school-wide.

What we've learned:

- » Some teachers are attracted to leadership positions because they want to influence school and district policies.
- » Purposefully structured occasions for teacher input, such as leadership team meetings, focus groups or surveys, ensure that teachers feel their voices are being heard and lend credibility to the program.
- » Increasing teacher voice in school decision-making represents a culture shift requiring respect by teachers and principals for one another's expertise and ability to cope with change.

PART III: Enabling Conditions to Launch and Sustain Teacher Career Pathways

The preceding section described the design features of the teacher career initiatives highlighted in this study. But the best design will not be successfully implemented without some critical prerequisite conditions for its success, or what we call “enabling conditions.” The underlying conditions we observed in these case studies are critical to address both at the design phase and on an ongoing basis. These conditions include the *readiness* of a school or district to implement a teacher career initiative, the *leadership* needed to launch and support the initiative, *stakeholder involvement* in the design and implementation of the program, *school culture*, and *funding sustainability*.

Readiness

“...we had some schools that pulled out of the design process because their vote said that not enough of their teachers were in support of it yet. And so we’ve had schools that have pulled out and are going to be part of cohort four because they need to build up that readiness.”—Denver administrator

“Timing could not have been better.”—Southeast Polk administrator

“LIFT is so embedded right now into IMPACT that as long as IMPACT’s there, LIFT will be there as well.”—DC principal

The readiness of a district is critical because the adoption of a teacher career initiative involves altering traditional relationships between teachers and administrators, creating cultures in which teachers willingly open their classrooms for scrutiny by peers, and accepting new working relationships as well as differentiated roles and compensation for teacher leaders. Considerations include whether the initiative is linked to strategic priorities of the district, the culture of the district, whether the initiative should be piloted in a few schools or implemented across-the-board, and the existing capacity of the district to expand informal teacher leadership roles—such as teacher involvement in professional learning communities—into established teacher leadership positions.

DC LIFT was designed to build upon IMPACT, the ground-breaking teacher evaluation system, and IMPACTPlus, the performance-based pay system introduced during the 2009-10 school year to reward highly effective teachers and teachers in high-poverty schools. A former DC LIFT district coordinator noted that LIFT was a response to some of the negative feedback and dissatisfaction expressed from some teachers about the IMPACT evaluation system. As a consequence, the district created additional leadership positions aligned to the LIFT career and compensation levels.

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The Denver Differentiated Roles Pilot builds upon Denver's well-known Professional Compensation Plan for teachers, called "Pro-Comp," which was first implemented as a pilot in 1999 and was adopted district-wide in 2006 with a \$22.6 million Teacher Incentive Fund grant. This compensation system involved paying bonuses to teachers with specialized knowledge and skills and to those who agreed to work in hard-to-staff subject areas or schools. In addition, it rewarded teachers with pay increases for improving student achievement. One Denver administrator described 2009 as the "big bang of teacher leadership." The DR Pilot built upon those earlier initiatives to provide teachers opportunities to earn increases in base salary by taking on differentiated leadership responsibilities.

The Southeast Polk TLC initiative coincided with a district-commissioned ACT Core Practices Audit in 2013 that found that the district needed to embed professional development within its curriculum, instruction and assessment system through strong grade level and collaborative teams of teachers. In the period prior to the district submitting its grant application, data teams and professional learning communities had already been working to align curriculum with the Common Core, and teacher leadership roles had been promoted through the district's participation in the Iowa Core Leadership Team. This previous work meant the district had already laid the groundwork for writing the state grant that secured funding for the district's TLC initiative. The district was able to create a newly designed system that formalized what teacher leaders had been doing in the past informally. A principal commented, "We've had different pieces of coaching in the district for a decade or so, but nothing as formalized as this."

Other districts created support for their teacher career initiatives by beginning with a few schools and expanding incrementally as teachers and principals saw the benefits of implementation and additional funding became available. Knox County's TAP initiative began with four schools in 2006-07. In 2010, TAP was expanded to 18 schools in conjunction with a Teacher Incentive Fund grant in partnership with the National Institute for Excellence in Teaching (NIET). Seattle launched its Career Ladder Program with 11 school and 28 career ladder teachers. As of the 2015-16 school year, 94 of the district's 97 schools are participating.

What we've learned:

- » Speed and success of implementation will be positively influenced by the extent to which the teacher career initiative maps onto the district's strategic priorities and experience with shared leadership.
- » Piloting differential teacher roles and career options on a voluntary basis with a "coalition of the willing" can help build support over time and prepare other schools to adopt those models.
- » Districts' previous experience with informal teacher leader roles builds capacity for expansion and formalization of those roles in teacher career advancement initiatives.

Leadership

“Our Denver Plan 2020, it’s very clear that in that plan that this is about closing achievement gaps, and you don’t close achievement gaps by doing the same ... things that you’ve done for 50 years. And so if we’re not going to be different then we’re wasting our time. And so schools will look different in Denver Public Schools by 2020 than they did in 2005.”—Denver administrator

Our case studies point to two dimensions of leadership needed to launch and implement teacher career pathways initiatives: policy leadership and district/school-based leadership. Policy leadership from multiple and diverse sources plays a critical role in launching teacher career initiatives. The federal government has been influential with the Teacher Incentive Fund (TIF) grant program, which has directly or indirectly funded five of the study sites (Summit Charter Academy through the Aspire Charter Schools network, DC LIFT, Knox

County through NIET, Seattle and Denver). TIF was established in 2006 to support performance-based teacher and principal compensation systems that reward teachers and principals based on student achievement gains as well as classroom observations. States have also initiated teacher career initiatives by providing state grants (Scottsdale through the Arizona Career Ladder Initiative [which ended in 2014] and Southeast Polk through the Iowa Teacher Leadership and Compensation grant program). Foundations and philanthropic organizations have also played significant roles. The Great Schools Partnership initially funded the four Knox County schools to participate in TAP. Denver received a \$10 million multi-year grant from the Bill and Melinda Gates Foundation to design a comprehensive talent management system for teacher effectiveness, leading to the development of the district’s teacher-evaluation and growth system (“LEAP”). Other organizations have been instrumental in creating, launching, supporting and evaluating policy alternatives, including Public Impact (our partner in this research study), which provided technical assistance to CMS in implementing its OC initiative.

Nonetheless, none of these initiatives would have emerged without the vision of district leaders. The executive director and zone superintendent for CMS approached Public Impact to help solve a critical priority of reducing teacher turnover and placing a great teacher in charge of every classroom; two successive district superintendents championed scaling the work beyond the initial L.I.F.T. pilot. The superintendent of Southeast Polk and his leadership team pursued the Iowa state grant because they envisioned accelerating teacher growth and effectiveness through increased support and coaching. The DC Public Schools engaged in a partnership with Stanford and the University of Virginia to conduct research into teacher professional growth, teacher morale and career ladders. Denver’s superintendent has a clear vision that the career structures in DPS need to be “flattened” in order to be more effective. As one Denver school administrator observed, “From day one, the superintendent’s message has been that in no other industry do you see a span of control over six to eight people and we need to get our high school principals to supervise 40 people; you can’t have good instructional feedback.” The Knox County TAP program was largely an initiative of the Knox County superintendent and the state, which was pushing for performance-based compensation and seeking TIF and Race to the Top (RTT) funds to support such initiatives.

Our case studies point to two dimensions of leadership needed to launch and implement teacher career pathways initiatives: policy leadership and district/school-based leadership.

None of these initiatives would have emerged without the vision of district leaders.



What we've learned:

- » Strong district leadership is a necessary prerequisite for teacher career initiatives to be successful or sustainable.
- » Transitions in district-level leadership—especially in large urban districts—are a cause of concern for teachers and administrators, who worry about the impact of politics on leadership continuity and the initiatives launches by former leaders.
- » Leadership matters at many levels. It is critical to recognize and promote leadership qualities in all teachers, regardless of formal roles.

Stakeholder involvement

“We met with administrative groups, we met with our Cabinet, we met with every teacher group. We met in every school. All of our teachers could come and offer input. So we did a road show of 11 different schools in about two weeks.”—Southeast Polk administrator

“This needs to be a teacher-led initiative, a teacher supported initiative, because it is about elevating the craft from the peer perspective...”—Denver teacher

Responses of focus group participants and district leaders regarding stakeholder involvement in the development of the program varied depending upon how long the initiative has been in effect and the background and experiences of those who participated in this study. In Scottsdale, for example, the initiative has been in effect since 1985, and the institutional memory of who was involved in the program's initial design is limited, although a Scottsdale administrator commented, “There was administrator support as well, but it was educator developed ... Yes, and then also it had to be approved, and still each year our application is approved by the governing board as well.”

There was little evidence that emerged from this research that teachers had much input into the design and adoption of the TAP model in the Knox County schools. Nonetheless, in order for TAP to be adopted in a school, 75% of the teachers were required to vote in favor in the model, and—in most schools—the approval rate was 90% or higher. In regards to the Seattle Career Ladder Program, the initiative was designed primarily by the two administrators who wrote the district's application for a TIF grant. According to the Seattle Times,⁷ the union did not sign the initial grant application, but provided a letter of support after it finalized its new contract with the district in September, 2010.

Of all of the study sites, Southeast Polk, which launched its initiative in 2015-16, provides the most vivid illustration of how to engage and gain the support of major stakeholders in the design of a comprehensive teacher career initiative—in a relatively short period of time—in order to meet the state grant deadline.⁸ A committee of central office staff and union leadership first put together ideas for the grant and then “went on the road.” Each building had representation on the four-person committee that drafted the grant, which then was vetted across the district. Feedback was even sought from student groups. A Southeast Polk administrator commented, “The kids were great,

⁷ <http://www.seattletimes.com/education/seattle-schools-win-125m-for-teacher-principal-incentives/>

⁸ It should be noted that state guidelines for districts submitting applications for the Iowa Teacher Leadership and Compensation Initiative required broad stakeholder involvement in the design of the initiative.

because immediately they gravitated to...‘our teachers are going to have people who are going to help them teach better? Really? That’s neat!’ And one junior high kid said, ‘Don’t we have people who do that already?’” Parent groups were engaged in four different schools to offer their perspectives. On two occasions, the draft grant applications were presented to the Board of Education. The administrator noted, “We rolled it out in a Board workshop, and then we were required to have a formal Board vote from the stipulations of the grant, and it was a seven-zero vote. They were very excited and some of them continue to be really excited about it.”

Engaging teachers, administrators, teacher associations/unions, school boards, parents and the community is not just critical for launching an initiative, but for ensuring support in the long-term.

What we’ve learned:

- » Engaging teachers, administrators, teacher associations/unions, school boards, parents and the community is not just critical for launching an initiative, but for ensuring support in the long-term.
- » Stakeholders need to be consulted on an ongoing basis to ensure continued support for the program, particularly when funding is at stake.
- » Teacher involvement in the design of a teacher career path initiative plays an important role in creating support for the program at the school level. Similarly, teachers need to be engaged in providing ongoing feedback on the success and challenges of the initiative.

School culture

“The culture around school leadership has to shift and school leaders have to also be developing themselves to do their work better. They have to be aligning cultures in their building to accomplish student outcomes and the DR role needs to be a part of that alignment...if that vision isn’t there from the top down, it’s going to turn into a hotbed bevy of mess and anger.”—Denver teacher

A positive school culture is a collaborative culture, not a competitive one.

“...it’s because of that culture, it is because of that career ladder culture. Every single teacher is vested in getting that student growth, doing the best thing they can for their students on campus, in their classroom, at their school, on their campus, helping another colleague...it really has created a culture within our district.”—Scottsdale administrator

A positive school culture is a prerequisite for creating a successful career advancement initiative. It is also one of the benefits noted by teachers and administrators across study sites. A positive school culture is a collaborative culture, not a competitive one. Teachers feel responsible for all students in the school, not just the ones in their classes. A level of trust exists that makes the school staff feel comfortable with change and uncertainty.



Creating a positive school culture requires support, information and resources for teachers. In Scottsdale, each school had a communicator who would disseminate up-to-date information and be available if anyone had questions or concerns. DC LIFT created a building-level teacher leadership role, called LIFT ambassadors, to communicate how the program worked in coordination with the IMPACT evaluation system. According to the DC Lift district coordinator, “Some of our schools do a phenomenal job of really being inclusive and building relational trust among all teachers, having great transparency and input from administration to teachers and teachers to administrators; others, that’s something they’re still working on.” A Knox County teacher commented, “Well, that was our mantra our first year of implementation, was you win the staff over with support.”

Transparency and trust are critical in order to successfully implement peer coaching, peer evaluation and other forms of collegial interaction. As one teacher in Scottsdale observed, “There is that trust and comfort level when the peer evaluator goes into the classroom.” A Seattle Career Ladder Teacher (CLT) described how she built trust: “I think it’s something that really was able to change as we continued to be really positive and really show that everybody has strengths, and I think that that’s made a huge change.” Another was to show that CLTs were not “spies” or evaluators and that their role was to support teachers. One CLT said, “Once I had proved that my actions followed that my purpose was as stated then people were very welcoming. But that initial—the whole collaborative piece—was a new thing.”

Transparency and trust are critical in order to successfully implement peer coaching, peer evaluation and other forms of collegial interaction.

Creating a culture that supports teachers assuming leadership roles can be a challenge, especially when younger teachers assume leadership roles and veteran teachers are mistrustful of their knowledge and expertise. Teacher leaders need to build trust and be respected by staff. One Southeast Polk teacher described the instructional coaches as “the little engine that could ... They’re not going to give up, and they’re just trying little baby steps ... to establish that sense of trust with especially some of the older teachers.”

School culture also affects whether teachers and administrators feel comfortable with change and uncertainty. At multiple sites, teachers and administrators noted that they are dealing with constant changes due to multiple and sometimes overlapping state, county and local district initiatives in addition to the teacher career ladder system. As one Knox administrator commented, “We’re doing the TAP thing, we’re doing Common Core thing, and then now we’ve got the one-to-one technology ... so it’s a culture change this year, and when you put change out there, a lot of times you get pushback a little bit ... I think we’re definitely caught up in that a little bit, not that anybody’s vocal about that or negative about that; it’s just change and it’s different.”

Southeast Polk County and Seattle teacher leaders explained that their role was to remain positive and inspire other teachers to see the connections among the initiatives and in dealing with change. The coaches served as models of enthusiasm and commitment by giving teachers time to observe and learn from others, as well as “vent” and share their mistrust, misunderstandings, and frustration. A Seattle CLT described their role as culture changers. “... we’re really trying to build a positive—at least I feel like we’re kind of cheerleaders for a positive collaborative, open teamwork ... it’s not in the job description but I feel like it’s definitely a job. And so, having that responsibility as being the cheerleader, being the one that wants to get everybody going, is really a change.”

The Summit Charter Academy principal acknowledged that, “even in a collaborative environment—we have a great culture, the staff is very cohesive—that there is some anxiety around this.” Dealing with change is not easy, notes the principal. “Aspire is changing and growing, so I think to be successful with this model, I think you have to have a staff of teachers and other members that are comfortable with ambiguity. I think you have to be kind of a risk taker and feel comfortable with uncertainty.”

It should be noted that the terminology “career ladder,” as used in three of the case study initiatives, can sometimes be problematic as well as emblematic of the challenges of building cultures that support differentiated roles for teachers. A Seattle career ladder teacher commented, “‘Ladder’ means that you’re on a higher rung than them, which means you’re higher and that’s not nice.”

What we’ve learned:

- » Teaching is transformed from an individual activity to shared responsibilities by teams of teachers led by teachers.
- » Teacher leaders play important roles as culture changers by serving as models of enthusiasm and commitment in order to give colleagues time to adapt to change.
- » Including teachers in the selection process for teacher leaders helps build trust and credibility in those selected for those roles.
- » Administrators play critical roles in creating positive school cultures by partnering with teachers to access their voice in decision-making, seeking their advice in solving issues, and recognizing and promoting leadership qualities in all teachers, regardless of whether they have formal leadership roles.

Funding sustainability

“We even discussed that when we were selling this, that our plan would be so successful, even if our funding was cut from the state, that we would find somehow to manage it through the district. So, hope so.”

—Southeast Polk administrator

There is a very large elephant in the room in regards to long term, sustainable funding—an obvious problem that is not always addressed in the planning or early implementation phases of the initiatives.

Funding stipends, substitute costs or professional development often come to mind as the “costs” of teacher career pathways initiatives. However, some of the more significant costs are replacing

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—Summit School principal

There is a very large elephant in the room in regards to long term, sustainable funding—an obvious problem that is not always addressed in the planning or early implementation phases of the initiatives.



classroom teachers when teacher leaders are released full-time to assume instructional coaching roles. Thus, it is not surprising that only Knox County (TAP master teachers), Scottsdale (peer evaluators on a rotational basis), and Southeast Polk (instructional coaches and curriculum and professional development leaders) had teachers who were 100% released,⁹ as those costs are less easily absorbed in regular school operating budgets.

Teachers and administrators in many of the study sites cited sustainability of funding as a major concern. Of the eight case studies presented here, five sites received federal Teacher Incentive Fund grant funds to launch new teacher leadership structures: the Summit Charter Academy (part of the Aspire charter school system, which was the recipient of the grant); DC Public Schools (to fund both their teacher evaluation system IMPACT as well as the LIFT leadership initiative); Knox County Schools (through grants from NIET to expand the TAP Program in that district); the Seattle Public Schools; and the Denver Public Schools. Two initiatives were supported by state grant funds. Southeast Polk Community School District was the recipient of a state-funded grant (Iowa Teacher Leadership and Compensation grant). Scottsdale's Career Ladder Program was initially funded in 1994 through a state grant, but—over time—Scottsdale was largely able to support its career ladder program through local funds from a voter-approved tax levy. CMS's Opportunity Culture initiative, which funds all teacher pay supplements within existing budgets, did not receive any large grants, but some initial transition funds were required, along with technical assistance from Public Impact.

Questions were posed to school leaders in each of the study sites as to how they planned to sustain these initiatives once the grant funds were exhausted. Responses varied.

⁹ Note that both Aspire Summit Charter Academy and DC LIFT are piloting hybrid teaching/coaching roles.

The DC Public Schools engaged Education Resource Strategies (ERS) to develop a sustainable funding model for both DC LIFT and the new salary structures that accompanied the implementation of IMPACT. This model examined past data to estimate how teacher effectiveness and compensation costs would change over the next 10 years. As a consequence, projected inputs (such as annual step increases, performance bonus amounts, and benefits) as well as teacher effectiveness and other decision variables were added into the “average teacher cost.” As part of the school budgeting process, each school receives an allocation based on a weighted-student funding formula. Schools then have autonomy how to use that funding, with each position being “purchased” based on its average cost (as of the 2013-14 school year, estimated at approximately \$95,000). Thus, DC LIFT’s costs are being increasingly folded into the general staffing and operating budget of the schools.

Similarly, the Aspire Charter management organization is taking steps to ensure the financial sustainability of its career path system, as implemented in the Summit Charter Academy. Beginning in the fall of 2014, a new salary structure has been implemented to augment bonuses and make those salary adjustments more permanent and competitive with surrounding school districts. In the event grant funds are reduced, it is anticipated that certain school-based positions such as a “data driver” will be funded through the home office. Other positions will be absorbed into school budgets with the expectation that costs will become manageable over time and additional funding sources (such as increased state funding, which is anticipated in California, for example) will be forthcoming.

NIET is working with the Knox County Public Schools to determine how best to ensure there are enough resources from local, state and federal sources to continue to provide all components of the TAP System in their schools. Knox County is already experiencing the impact of the phase-out of grant funding and the need to restructure the program in the long-term. A Knox County senior official observed, “TAP is expensive, not to say the investment isn’t worthwhile. We’ve been fortunate to have dollars from the TIF grant and the Great Schools Partnership.” But she noted that the last few years had been challenging in terms of school budgets and that not all of the 14 TAP schools will likely be continued next year. As a consequence, there may be fewer TAP master teachers and mentors at those schools. Beyond the 2015-16 school year, the future of TAP in Knox County is uncertain. But what was clear was that TAP has had a lasting influence on all of the schools in the district. Currently, the TAP rubric has been built into the state’s evaluation model (TEAM) used in the district. This senior official further commented that “We have been able to roll into TEAM some of the things in TAP—retaining the spirit anyway,,, We also have a strategic compensation initiative—not exactly like the TAP model, but there are some similarities.” Another example is the creation of a lead teacher role in every non-TAP school. The lead teacher’s responsibility is to provide instructional support and coaching, as well as rate classroom observations in conjunction with the TEAM formal evaluation process.

The Seattle Public Schools have taken steps to ensure the Seattle Career Ladder Program outlives the Teacher Incentive Fund grant monies. The district’s 2013-18 Strategic Plan includes the goal of increasing the number of career ladder teachers available in schools.¹⁰ In addition, the Career Ladder Program is now embedded within the Seattle teachers’ association contract. Although the Teacher Incentive Grant awarded in 2010 initially funded the Career Ladder positions, the district has made adjustments to include the positions and stipends in the school’s baseline funding. The district also secured a supplemental property tax levy in November, 2010, to fully fund the Professional Growth and Evaluation initiative, of which the career ladder is a part.

¹⁰ http://www.seattleschools.org/modules/groups/homepagefiles/Charlotte-Mecklenburg_Schools/1583136/File/Departmental%20Content/strategicplan/2013/Strategic_Plan_2013_2018.pdf



In CMS, each school design team must develop a plan that is fully funded by the school's own budget from day one. Teams work with a spreadsheet that lists their current allotment of positions and the new set of positions the team wants to create, include advanced teacher roles. To pay for the \$6,000-\$23,000 supplements OC offers, teams exchange existing positions for new positions and/or supplements for advanced roles. For example, a literacy coach may move into a higher paid multi-classroom leader position, while also swapping a team teaching position for more paraprofessional support. Everyone remaining on the team can earn more, while also adding an adult to the team to decrease instructional group sizes. Teams use the spreadsheet to make sure their new design can be fully covered each year by their existing budget.

In regards to the Southeast Polk Teacher Leadership and Compensation Program, sustainability of funding was acknowledged to be an unknown. The statewide TLC initiative was the result of the state budget producing surplus of three-quarters of a billion dollars, and specific funds were earmarked for this teacher reform initiative. Southeast Polk received a three year grant, with the expectation that funding levels would continue to be based on student enrollment and FTEs over that period. What happens after that, however, is uncertain.

Ironically, sustainability of funding of the Scottsdale Career Ladder was not an issue for the district, as the initiative became largely self-funded in that district over time. The inability of the state to expand the initiative to any interested district was the basis for the lawsuit that resulted in the Arizona Career Ladder being deemed unconstitutional on the basis of inadequate state funding. The Arizona State Legislature passed legislation mandating that "no new participants" and only teachers participating in the 2012-13 school year were eligible to continue in the program, thereby resulting in its phase-out in Scottsdale.

What we've learned:

- » State, federal or private foundation grant funding can be invaluable to "kick-start" teacher career advancement initiatives.
- » Planning up-front on how to continue the initiative after grants phase out is critical for credibility of the program and "buy-in" of staff, particularly veteran staff who have seen grant-funded programs come and go.
- » Redirecting existing funds related to staffing or professional development to new purposes can be useful in transitioning from grant funds to existing budgets over time.

PART IV: Trends, Benefits and Issues

A key goal in our study of teacher career pathways initiatives was to identify some general trends across all of the models we studied, including a focus on the benefits and the issues for teachers and school districts. Here we share these results by focusing on seven domains:

1. Trends in recruitment and retention of teachers
2. Challenges in creating time for teachers to meet and collaborate
3. Changes in collegial interaction and shared responsibility for one's colleagues
4. Impact on teacher effectiveness and short-term learning outcomes
5. Teacher job satisfaction
6. Changes in teacher/administrator relations and the roles of principals
7. Challenges in sustaining teacher career pathways initiatives

Trends in recruitment and retention of teachers

"I know with so many new teachers in my building, that their CLT is really like their lifeline and that's who they're going to. And without that I think they would have had a much harder year. And I know that they're coming back and I don't know if that would have been the case without that mentor."
—Seattle administrator

"Our instructional coaches are our mentors at the same time ... with an instructional coach who's on full release, you have 24/7, 365 access to this person. And that alone, to me personally, that was worth \$2.2 million for me, was just that piece alone. Because again, as the HR guy who recruits people or whatever, this has been an unbelievably powerful recruiting tool."—Southeast Polk administrator

"...DCPS has done a great job in finally getting the word out to the public that teaching is a profession, and we are professionals."—DC LIFT ambassador

All districts with teacher career advancement initiatives reported an increase in applicants to teach in the district and increased teacher retention rates. A Scottsdale administrator noted, "I remember in the '90s and early 2000s, we had just a huge influx of teachers from all over the valley, because of our career ladder model, and because of the way it functioned." A DCPS administrator commented, "now that we have the LIFT program and other incentives and initiatives, a lot of folks know DC is the spot to be in when it comes to educators. DC gets hundreds of thousands of résumés through the central office application." A Denver teacher leader observed, "I am a teacher ambassador for the district and so I know for a fact that there are 1,500 outside, out of state applicants who want to work in DPS and we are either their first or second choice when it comes to teaching, and this includes veteran teachers as well as new teachers. So it's one of those things that is attracting others to our profession, specifically because we have this additional layer." CMS's high-need L.I.F.T. schools, which traditionally had trouble filling vacancies, received 700-800 applicants from around the country for the 19-26 OC positions available during the

All districts with teacher career advancement initiatives reported an increase in applicants to teach in the district and increased teacher retention rates.



first two years of implementation. The district also saw an increase in the quality of applications from one year to the next.

What these case studies illustrate is that the opportunities for mentoring, higher salaries linked to effectiveness, and career options are consistent with research on Generation Y teachers. Specifically, Generation Y teachers are open to rewarding outstanding performance and increased responsibilities and view meaningful learning opportunities and opportunities for collaboration as critically important (Behrstock & Clifford, 2009; Coggshall et al., 2009).

These case studies also illustrate that teacher leadership opportunities have a positive impact on retention of effective experienced teachers.

These case studies also illustrate that teacher leadership opportunities have a positive impact on retention of effective experienced teachers. A Summit Charter Academy teacher reported, "I'm going on my fifth year. I just feel even more close to the staff that's here and it's just, it's so encouraging. And I was just sharing ... 'I never want to leave here.'...I love that I have the opportunity to be a lead teacher. For me, that fills that opportunity for that leadership role." A similar sentiment was expressed by a Knox County teacher. "This is my 35th year teaching. And I stayed five years longer past when I could have retired, because of the opportunity to take on such a big leadership role in my school and not have to be an administrator in order to do that. So I started out as a mentor teacher, and for the last four years have been a master teacher. And I'm not retiring 'til this year because I've really enjoyed that role and being able to take on that leadership responsibility in my school."

The DC LIFT initiative presents challenges in making direct inferences about impact of the LIFT leadership opportunities versus the impact of the controversial teacher evaluation system (IMPACT) and IMPACTPlus, which rewards highly effective teachers with enhanced compensation. DC LIFT was intentionally structured to provide incentives for younger teachers as well as highly effective veteran teachers to remain in the classroom. A recent study by Dee and Wycoff (2013)¹¹ examined the effect of IMPACT (which determines teachers' assignment to a LIFT stage) on teacher performance and retention of high- versus low-performing teachers during the first three years of implementation (2009-2012). Their findings were that threats of dismissal and financial incentives for high-performing teachers increased voluntary attrition of low-performing teachers, but then increased the performance of low-performing teachers who stayed, as well as high-performing teachers.

An unintended consequence of some teacher career advancement programs is increased teacher turnover within districts like Knox County, where the teacher career advancement initiative has been implemented in only some of the schools in the district. Administrators commented that some good teachers transferred to non-TAP schools because of the extra planning time required, the burden of additional observations which are part of the TAP evaluation system, or because "it was just too much for them." In addition, the district TAP director noted that additional teachers were lost to promotions: "They move around because they move up within the program." That increased movement of teachers means the need to reconstitute and retrain Teacher Leadership Team members. This "churning" makes continuity of implementation at the school level more difficult.

¹¹ http://curry.virginia.edu/uploads/resourceLibrary/16_De-IMPACT.pdf

Challenges in creating time for teachers to meet and collaborate

“You can give on-the-spot modeling or help with resources that before you would have had to wait until you had a planning time, or maybe you could catch a coworker after school to have them show you how to teach long division. But now I can go in and meet with them whenever they have time. And so just that flexibility to be able to meet people where they need it whenever they need it.”

—Southeast Polk instructional coach

“I think from the beginning when I first started teaching 12 years ago, I’ve always felt that time over money is more valuable to teachers every, every time.”—Seattle career ladder teacher

There are significant costs associated with releasing teachers full-time for instructional coaching and replacing those teachers in the classroom. That is why most teacher career initiatives we studied require teacher leaders to have full-time teaching responsibilities, with substitutes to provide time to mentor or coach and stipends to cover after-school and summer work. There are, however, intrinsic “costs” to layering additional responsibilities on teacher leaders: inability to provide timely feedback to colleagues, burnout, and turnover in participants. One Knox County teacher commented, “I have lasted three years...But staying until five, six o’clock at night. Going home, working on evaluations that I’ve done this week. So it’s massive. It’s overload.” Lack of released time and modest stipends were cited in several instances as reasons that otherwise highly effective teachers opted not to apply for certain leadership roles.

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In response to the challenges of adding teacher leadership responsibilities to full-time classroom teachers, some districts have adopted “hybrid” teaching/coaching roles, which will also be piloted in the Aspire Charter Network in the 2015-16 school year. In addition, the DC Public Schools launched a Teacher Leadership Innovation (TLI) pilot in 2013, in which teachers and school leaders design and implement teacher leadership roles that allow a teacher to spend part of the day teaching and part of the day leading other adults in the building. Though hybrid teacher/coaching roles provide more time in the day for teacher leaders to fulfill their coaching or other leadership responsibilities, it is not without its challenges. A Denver team lead teacher noted, “Nobody that I know that is being successful in this role is doing it 50% of the time. They are doing two 100% of the time jobs.”

In CMS, the design process for OC schools placed a premium on careful scheduling and team structures in order to give teachers the time they need to play new leadership roles and engage fully in planning, collaboration and development. Deliberate scheduling ensured that teachers had significant blocks of time throughout the week for these functions. Creating new “reach associate” positions filled by carefully selected paraprofessionals helped free these blocks of time. Through their revamped schedules, multi-classroom leaders in OC schools have an average of about 350 minutes per week during the school day for these functions, and their team members have a similar amount. Schools transitioning to OC models gradually over a few years had more difficulty changing school-wide schedules to provide OC teachers with enhanced planning time.



Changes in collegial interaction and shared responsibility for one's colleagues

"I'm constantly getting feedback from mentor teachers, from master teachers. There's never a week that goes by that I haven't had two or three people in my classroom, giving me feedback."—Knox County teacher

"You're performing for your peers."

"You're not performing for just the dollar, you can't let down a group of people you've been working with."—Comments by two Scottsdale teachers

One of the most commonly cited advantages of teacher career advancement initiatives was more collegial interaction, with teachers working with colleagues across grade levels and subject areas.

One of the most commonly cited advantages of teacher career advancement initiatives was more collegial interaction, with teachers working with colleagues across grade levels and subject areas. In some sites, however, it took time and effort to change the culture of isolation to promote sharing of practice and collaboration. A Seattle teacher commented, "Our school was where the doors were closed, everybody was very solitary, but this has changed—the program has changed the fact that we do wander in and out of each other's buildings and we do facilitate it by having meetings ahead of time ... it's been a transition and it's been a slow transition." A teacher in Denver noted, "That's the beauty of DR, I think, is that I have had an absolute role in shifting a team from closing their doors and not talking to each other to collaborating for most of what they do, which is magic." In other sites, however, those changes occurred more quickly. Less than five months into the implementation of the Southeast Polk TLC Program, a principal commented, "This is a different feeling than it's been in the past." Another noted, "There's more sharing. There's more quality lessons going on because the coaches are in multiple rooms, sharing the ideas. They're modeling lessons."

Increased collegial interaction resulted in teachers feeling responsible for the success of their colleagues in improving student learning. A Scottsdale administrator commented on the learning communities taking responsibility for their members. “It’s just not me against you, because I want to be the best teacher, or whatever, or I want to be the favorite teacher in my grade level, it’s what can we do to help our kids, what can we do? Some grade levels plan together, others co-plan things, but they do what they need to do so that it works within their own learning community, or their school community, and they do what’s best for their community.”

Impact on teacher effectiveness and short-term student learning outcomes

“I [have to] play my ‘A’ game every day because I don’t know when they’re coming in. And then just studying that rubric...to keep that highly effective status, I feel like that really helped me become a better teacher for my kids.”—DC teacher

“I’m very, very proud of our program for not pitting teacher against teacher in that sense, and we know we are having an effect on student achievement, we have the data to prove it, we have all kinds of hardcore, quantitative data, it’s just not one test score, and I think that, I mean, you were asking earlier about what to do, what not to do, I would say don’t tie it to one test score.”—Scottsdale teacher

“As a classroom teacher, I might be able to reach about 100 scholars. Here I’m able to reach 371 scholars. I know them by name and I know them by face ... I know exactly what they need help with and I know exactly what they’re really strong in. So I’m able to feel like I’m making a bigger difference... That’s the whole reason I’m an educator—to impact lots of students, and I feel like I’m really having an impact and am able to change their life trajectory through this role.”

—Charlotte-Mecklenburg Schools teacher leader

There is limited “hard data” in these case studies about the impact of teacher career advancement initiatives on student achievement, although there is much anecdotal evidence from teacher and administrator focus groups. Some programs have been in effect for a relatively short period of time and are often accompanied by other district reform initiatives. Nonetheless, teachers and administrators almost universally cited the benefits of collaboration, focused conversations on curriculum and instruction, modeling of lessons, and reflection on teacher effectiveness. Some of the most powerful observations were about the effect on students. A Knox County teacher noted that her students were now using the language of the teacher effectiveness rubric: “I have kids at Dogwood who are [living in] poverty, 86% free and reduced lunch, who are using words like reinforcement, refinement. I mean, these kids are growing so much. They’re giving each other academic feedback and calling it academic feedback.”

A Seattle teacher observed that, seeing teachers starting to take more risks, kids began to see that “maybe this is a safe place to ... make mistakes, to take risks.” Teachers and administrators in numerous study sites also spoke about the growing sense of shared responsibility for all students. A teacher at Summit Charter Academy commented, “I don’t look at just my class as my students. I look at all of our students. We have over 400 students at our school and I know I’m not the only one. We all think that these are all of our kids.”

Teachers and administrators almost universally cited the benefits of collaboration, focused conversations on curriculum and instruction, modeling of lessons, and reflection on teacher effectiveness.



There were a few districts that could cite some data on improvements in student growth. The director of the OC initiative in CMS noted, “Some teachers have seen advancement of 1-2 grade levels of math. The data shows this, although not everywhere. There are lots of different factors in schools we serve that play into student achievement, but we’re seeing tremendous signs even in the pilot stage.” A recent study has indicated that, of the 14 Knox County schools that are part of the TIF-funded TAP System, 12 achieved significantly more than a year of growth on state assessments¹² during the 2010-11 school year, and one achieved one year of growth. During the 2011-12 school year, 13 of 14 schools demonstrated at least one year of value-added growth, and 11 schools demonstrated significantly above a year of growth for their students in reading and math on the Tennessee state assessments (Eckert, 2013).

Teacher job satisfaction

“I’m working on a really awesome professional opportunity with Boeing engineers that’s a lot of curriculum design that I would have never really known about had somebody not said, oh, that’s a Career Ladder teacher who has mentoring position and experience.”—Seattle teacher

“For me personally, I’ve been teaching for 10 years and this is definitely...I have the best work life balance that I’ve ever had in 10 years.”—Denver team lead

The general consensus of teacher leaders interviewed in these studies is that motivation and job satisfaction were positively affected by the opportunities for collaboration and professional development, recognition as leaders in their district, and opportunities for additional compensation. Some teachers were inspired to pursue other leadership or recognition opportunities such as National Board certification. The fact that teachers can take on leadership roles without stepping into formal administrator roles is perceived as a significant positive feature of the teacher career advancement initiatives. A Southeast Polk teacher leader noted, “I don’t want to be an administrator because I don’t want to be removed from the instruction or kids. This is the happy medium.” Teachers in districts such as Knox County, Scottsdale, Southeast Polk and Seattle spoke positively about the fact that there is a career progression, with different leadership roles available to teachers who want to take on more responsibility. On the other hand, participating as a teacher leader provides options for teachers to move into different roles or into the assistant principal role. One Knox County administrator commented about the TAP leaders, “They are very valuable, you know, once they have that professional development a year or two, they can pretty much name their job.”

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¹² CMS used value-added measures (VAMs) to estimate or quantify how much of a positive (or negative) effect individual teachers of schools have on student learning during a school year. These estimates are based on statistical algorithms and standardized test results and are often combined with other information to determine the teacher’s or school’s “value-added” score.

Issues of fairness are critical to teacher job satisfaction. Perceptions of fairness include that teacher leaders are selected through a rigorous, transparent and voluntary process. Further, teachers are involved in the selection of teacher leaders. The stipends or salary incentives appear proportionate to the additional responsibilities associated with leadership roles. However, in those districts in which eligibility for performance pay or movement up the career ladder is based on student growth data, teachers of the gifted and talented in

self-contained classroom or non-academic teachers felt the system was not equitable. Although the majority of teachers viewed the leadership opportunities and salary incentives available through DC LIFT favorably, there were some exceptions. Specifically, teachers who were not working in high poverty schools and were therefore not eligible for additional financial incentives felt that the salary incentive system was unfair. One DC administrator commented, “You have one spectrum where teachers are feeling really appreciated, and then you have another spectrum of teachers who feel they’re underappreciated, just because I’m not working with a Title 1 school.”

Perceptions of fairness include that teacher leaders are selected through a rigorous, transparent and voluntary process.

Changes in teacher/administrator relations and the roles of principals

“I collaborate with my administrator more now in order to lead learning-focused conversations, especially around data. And so, instead of me just doing it or her doing it, she’s letting me come and learn from her as she prepares. So that’s been nice.”—Seattle teacher

“...they have garnered more respect and buy-in from their teachers. Because they’re not seen as ‘us’ and ‘them’ anymore. It’s become more of a ‘we.’”

—Knox County teacher commenting about school administrators

“If they didn’t have the right principal in place, they didn’t have success with teacher leadership.”

—Denver Differentiated Roles Pilot leader

It was evident in our case studies that relationships change between administrators and teachers when teachers assume leadership roles. Moreover, there are many compelling reasons why teacher career advancement initiatives benefit principals by creating shared leadership structures in schools and giving teachers more voice in school decision-making.

Relations between teachers and administrators become more collaborative. One Southeast Polk administrator noted, “I think it’s similar to us in the classroom—another set of hands with the kids—[principals] have another set of hands with the teachers. If there’s a concern, then I have three model teachers I can send them to watch instead of me trying to work one-on-one with them. Again, I think the change comes better from a colleague than necessarily an administrator.” A Summit Charter Academy teacher noted that, “we came together as a team and said to our principal, ‘These are some things that we would like to see happen. We’re a very strong school. We’re very collaborative, but these are things that are going to be best for our kids and we need your support as the administrator.’ And she looked at the list and said, ‘This is all that you need from me?’” The principal agreed, “I’m already seeing some of the positives even—not only on the teachers but my ability to do my job well, that I’m really able to lead from behind and tap in on strengths to better the whole school. I think it makes me stronger as a principal to be part of a leadership team.”



As school systems have implemented new teacher evaluation systems that require significantly more observations, burdens and stresses on administrators have grown exponentially. The Summit Charter Academy principal noted that, "...principals, we all work really long hours but the TCRP ... I think it's a valuable process but in terms of time commitment, it's intense. So I'm doing 80, in essence, formal observations a year on teachers." When teacher leaders have the authority to design and implement professional growth experiences and in some cases evaluate, the principal is able to concentrate in other areas of need. A Knox County TAP principal describes his role now as less hands-on, instead spending more time collecting information, monitoring progress and meeting with leadership teams. A Scottsdale teacher commented on the lessening of pressure on principals: "It had to have made their job easier because there was somebody else in place that was handling all of the professional development, some of the development that needed to take place and the fact that [teachers] were evaluated by peers, or coached by peers, or their learning communities may have helped strengthen a teacher that needed further development. So it, in my opinion, made the job easier for an administrator." A Southeast Polk administrator affirmed that the relationship with the peer coach had enhanced his role as a principal: "It's almost like it has shifted the role of being a principal. And so, instead of some of those things you used to do at ten o'clock at night, you maybe get to at four or five in the afternoon."

The Denver Differentiated Roles Pilot was intentionally designed to deal with overload on school principals. As a consequence, team leads and senior team leads are responsible for a significant portion of the summative evaluations and coaching of teachers.

Initiating changes in the roles of principals to manage teams of teacher leaders requires new skills and support for principals. As noted in a recent report by Public Impact, "OC models provide new roles that are challenging and rewarding, but require new skills and capacities from both teachers and school leaders. School leaders report a number of advantages to using OC models, including their ability to lead a team of leaders rather than supervising dozens of individual teachers. Yet, principals have not held [extended] reach roles [as teacher leaders] themselves, and in most cases do not have experience leading a team of leaders who then lead instruction. Interviews revealed that school leaders need development and support."¹³

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¹³ http://opportunityculture.org/wp-content/uploads/2015/07/Opportunity_Culture_Implementation_Early_Lessons_from_the_Field-Public_Impact.pdf



Challenges in sustaining teacher career pathways initiatives

“With any initiative, you know, they get you hooked on it and throw you a lot of money, They’re starting to wean us off the money now, but it’s still something that I believe in strongly in that it will be in our budget, the funding for teacher leadership in this way.”—Denver principal

These case studies provide strong evidence that launching a teacher career pathway initiative requires vision, stakeholder support (teachers in particular), a school/district culture that can deal with change and ambiguity, and external support—either monetary or technical assistance. Sustaining these initiatives requires much the same, except that funding continuity is the greatest challenge.

The initiatives we studied were supported by a number of policy actors whose agendas were to re-examine the traditional career paths and compensation structures for teachers. This included the federal government through the Teacher Incentive Fund, statewide career ladder or teacher leadership initiatives (in the case of Arizona and Iowa), foundation or philanthropic organizations such as NIET or the Gates Foundation, and—more importantly—district vision. In almost all cases, some form of external funding was required to

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launch the initiative, with varying levels of district funding sources. However, grants are designed to launch programs, not sustain them.

The good news is that some of our study sites are navigating this treacherous territory with success (e.g., Seattle), while others are struggling or have not yet faced the challenge. However, there are two sites that potentially offer different ways to think about the way these initiatives can be funded sustainably.

The CMS OC initiative offers an alternative to the traditional ways that teacher leadership roles are funded. In this model, teacher career advancement roles are built on the principles of “extending the reach” of highly effective teachers, redesigning teacher roles into teams that include paraprofessional support, and using age-appropriate technology. This enables “excellent” teachers to save time, work with their peers and reach more students. By “swapping” traditional positions (e.g., non-classroom facilitator/specialists, deans, counselors, teaching assistants) with “extended reach” roles (e.g., multi-classroom leadership, elementary specialists), using advanced paraprofessionals to free teachers’ time to reach more students, and offering digital learning or project time under a teacher’s supervision, schools implementing the OC model can be funded sustainably without temporary grants and within current operating budgets.

Another option is to flatten the organizational structures of schools and replace some highly paid administrative positions with teacher leaders. Denver’s superintendent, Tom Boasberg, has expressed his vision about how schools must change to meet the demands of 21st century education and how teachers’ and administrators’ roles must change. This includes changing the span of control of supervision by principals and using teacher leaders to evaluate their peers. One school administrator offered his vision of a new school with fewer administrative, non-instructional roles. “We’ll be opening a new high school next year with Differentiated Roles Leadership built into the school’s DNA. And so I think, in short, what that looks like is we basically have very few administrative, non-instructional roles. Even as the principal I’ll be connected to classrooms and we believe that we need to make the investment in making our most effective teachers help lead for effective instruction school-wide.”

PART V: Summary and Recommendations

In our 2013 report, *Creating Sustainable Teacher Career Pathways: A 21st Century Imperative*, we highlighted “neo-differentiated staffing” models (Coggshall, Lasagna & Laine, 2009) as an adaptation of the “mass career customization” (MCC) concept that is evolving in the business world. MCC acknowledges that knowledge workers do not climb straight up the corporate ladder, but rather undergo a journey of climbs, lateral moves, and voluntary descents. MCC is part of creating a corporate lattice organization that allows employees to choose between four core dimensions of a career: pace, workload, location/schedule and role (Benko & Weisberg, 2008). Similarly, neo-differentiated staffing models present an alternative to the traditionally flat, linear teacher career path as it would allow teachers to move flexibly between roles as their expertise shifts, interests evolve, and family responsibilities grow and recede.

Although none of the teacher career advancement initiatives we studied fully embody a “career lattice” concept, they exhibit many of their features, such as teachers assuming differentiated roles and workloads, collaborating with colleagues, having opportunities for career advancement and higher pay for additional responsibilities and higher levels of competence.

Based on what we have learned, we offer the following key principles for developing a successful, sustainable teacher career advancement initiative. We also offer some guiding questions for schools or districts to consider when launching such an initiative¹⁴.

Think strategically and proactively in order to be ready when opportunity presents itself

- » Do you have a clearly articulated vision for the purpose of the teacher career advancement initiative and how it is aligned to district/school strategic priorities, current initiatives and state requirements?
- » Have you considered the culture of the district and school? Are principals and teachers ready to accept differentiated roles or compensation? Is there willingness for teachers to open their classrooms to peers? To be evaluated by peers? If not, what needs to be done to create that culture?
- » Have you developed a framework for a teacher career advancement plan that identifies barriers that need to be addressed in order for the plan to move forward?

Secure broad stakeholder support and teacher voice in the design of the initiative

- » Does your design team represent the diversity of district staff roles and schools in which the initiative would be implemented?
- » Do you have a plan to “go on the road” early in the design phase to collect input from teachers, principals, board members, parents, community members and other stakeholders?
- » How do you plan to involve teachers and teacher leaders at the school level to determine how teacher career pathways can meet their own schools’ needs?
- » Do you plan to “go back on the road” after changes have been made to not just seek additional input, but also to communicate that stakeholder feedback was considered?

¹⁴ Some of these suggestions have been adapted from Public Impact’s 2015 report, “Opportunity Culture Implementation: Early Lessons from the Field.”



- » How do you plan to continue to communicate the successes and challenges of the program after implementation so that broad-based community support is present when funding or other issues emerge?

Consider funding sustainability not just in the short-term, but over the long-term

- » When seeking grants to fund a teacher career advancement initiative, have you simultaneously created a long-term funding plan that considers how the initiative will be sustained once grant funds diminish or disappear? How do you plan on ensuring school personnel are confident about the potential longevity of this initiative?
- » Have you examined administrative and non-teaching staffing structures in your schools to determine whether they can be modified to free up funds to place more highly effective teachers in leadership roles?

Consider other dimensions of sustainability

- » Have you secured the support of school leaders at all levels of the organization for this initiative? District leadership may change, but teachers and principals need assurances about the continuity of message and the program over time.
- » Have you considered the “culture” of your schools and district and what will be needed to ensure teachers and administrators are comfortable with change and uncertainty, embrace collaboration at all levels of the organization, and create trust for teachers to embrace new leadership roles?
- » What strategies will you implement to ensure transparency through ongoing, continuous two-way communication among teacher leaders, principals and teachers about the purpose, design, strengths and areas for improvement?
- » Have you considered how to provide adequate time for teacher leaders to fulfill their roles without experiencing burnout or excessive turnover? Does your plan ensure “just-in-time” coaching support for teachers, time for teachers to work together as teams, and time for planning and professional development?
- » Have you created or expanded your existing data systems in order to track trends in teacher hiring and retention, collect input from teachers (including job satisfaction and concerns), and gather qualitative and quantitative data on student progress? Do you have a plan or strategy to share these data with various stakeholders?
- » What are the systems of evaluation and continuous improvement that you need to establish?

Ensure timely training for principals and teacher leaders

- » How do you plan from the outset to prepare your principals to understand how their roles will change, including what new skills or strategies they will need in order to partner with and coordinate teams of teachers?
- » Are you prepared to provide clear guidance and training to teacher leaders about their new roles? How will you ensure that these new leadership roles are communicated to all staff members on a timely basis?
- » Have you considered incorporating resources such as the *Teacher Leader Model Standards*¹⁵ when designing training for both teacher leaders and principals?

¹⁵ <http://www.teacherleaderstandards.org/index.php>

PART VI: Closing thoughts

The eight case studies highlighted in this report provide a powerful “existence proof” that teacher career advancement initiatives are feasible in both the short- and long-term and produce significant benefits to teachers, administrators, students and the schools/district they serve. Based on the diverse characteristics of the eight study sites, we believe such initiatives can be implemented in urban, suburban, or rural districts; high poverty or affluent districts; and in schools/districts both with and without strong union presence.

Each case study provides valuable insights:

- » **Aspire Summit Charter Academy** illustrates the power of a positive culture and teacher enthusiasm for opportunities for positive growth and collaboration.
- » **DC LIFT** shows that leadership opportunities linked to increased salaries are powerful instruments to attract and retain teachers.
- » The **Denver Differentiated Roles Pilot** informs us that flattening leadership structures by providing more teacher leadership roles may improve both teacher and administrator effectiveness and help create funding structures to better sustain teacher leadership structures over time.
- » The **Knox County TAP Program** provides evidence of the positive impact of such teacher career advancement programs on student achievement and the possibility of adopting major features of the TAP initiative (including lead teacher positions that involve instructional support, coaching and peer evaluation as well as strategic compensation initiatives) into the district’s long-term strategies when federal grants expire.
- » The **Scottsdale Career Ladder Program** informs us that the legislative phase-out of a long-term teacher advancement initiative risks undoing a culture of collaboration and collegial interaction and the resulting student learning gains.
- » The **Southeast Polk Community School District** informs us about the importance of “readiness” and enlisting strong stakeholder support for teacher career pathways as well as the value of state leadership and support for launching teacher career advancement initiatives.
- » The **Seattle Career Ladder Program** illustrates that offering leadership opportunities to teachers is a powerful teacher recruitment tool and that there are benefits to providing building-level flexibility in the implementation of teacher career opportunities
- » The **Charlotte-Mecklenburg L.I.F.T. Opportunity Culture** offers a model in which teacher leader roles can be sustainably funded within existing budgets by exchanging existing roles for new, higher paid roles and using technology and teaching assistants strategically.



There is no question that more study is needed into the various teacher career advancement initiatives highlighted in this report, as well as others occurring across the country. Many of the lessons learned in this study represent early findings from some initiatives still in the early stages of implementation, although the Scottsdale Career Ladder Program offers its own unique lessons about how political and legal dynamics can impact long-term sustainability. Some of the questions that remain to be addressed include:

- » What types of technical assistance or resources do districts or schools need to design and implement a sustainable teacher career advancement initiative?
- » What types of data do districts and states need to collect to provide evidence that differentiated teacher roles have a positive impact on teacher recruitment/retention, effectiveness and student achievement growth?
- » How can major policy initiatives be sustained when district executive leadership changes? Can mid-level school leaders continue these reforms?
- » How can these teacher career advancement initiatives continue with the phase-out of one-time grant funds?
- » How can stakeholder support be sustained over time when local funds may need to supplant state or federal funding sources?

In addition, there are a number of issues that need to be examined as possible policy barriers to implementing such reforms. A few examples are:

- » Do class size restrictions (at the state or local level) make it more difficult to implement alternative teaching/staffing roles?
- » Do state funding formulas in states that provide specific reimbursement for teacher staffing need to be changed to allow for more district flexibility (e.g., North Carolina, Tennessee)?
- » Do teacher certification structures need to better address differential teacher roles without restricting opportunities for well-qualified teachers or requiring advanced degrees?
- » Are current higher education programs that train teacher leaders or offer teacher leader endorsements effective in both placing teachers in leadership roles and providing measures of placement and effectiveness? What data do we need to collect in this regard?

The next few years will be critical in determining whether the teacher career advancement initiatives highlighted in this report will continue, expand or be modified. It is our hope that the lessons learned and recommendations contained in this report will help propel more schools and districts to implement innovative teacher career advancement initiatives.

Appendix A: Methodology of Study

The purpose of this qualitative case study is to investigate and document examples of teacher career continuum models and to develop recommendations for best practices in designing and implementing such models. We conducted site-visits in seven schools/school districts between 2013 and 2015 as follows:

- » Aspire Summit Charter Academy, Modesto, California—"The College Ready Promise (TCRP) Initiative"
- » Denver, Colorado—"Denver Differentiated Roles (DR) Pilot"
- » District of Columbia—"DC LIFT Initiative"
- » Knox County, Tennessee—"System for Teacher and Student Advancement (TAP) Program"
- » Scottsdale, Arizona—"Scottsdale Career Ladder Program"
- » Seattle, Washington—"Seattle Career Ladder Program"
- » Southeast Polk Community School District, Iowa—"Southeast Polk Teacher Leadership and Compensation Initiative"

Our research team collected on-site data, which included meeting with the district program coordinator (by phone or in person), a one hour-long meeting with a representative group of principals who were engaged in the program, and focus group meetings with up to 12 teachers representing the range of grade levels and variety of roles along the career continuum (e.g., coaches, master teachers, etc.). Teachers in the focus groups responded to questions about how the career advancement program has impacted their career goals and daily practices, ways in which teachers were involved in the development and implementation of the initiative, the benefits to teachers and students, and how the program could be improved. Administrators were asked similar questions, as well as questions about the key benefits and challenges the initiative presented to the district, the impact on teacher retention/recruitment and student achievement, how their roles as administrators had been affected, and the necessary supports required for effective implementation of the initiative. We also examined district policy documents outlining program structures and implementation policies. When available, we requested copies of external evaluations or available impact data (e.g., teacher recruitment and retention data or teacher surveys). These data were triangulated to support the observations in this report. Finally, research reports were produced for each study site, which has provided the basis for the information highlighted in this report.

Appendix B and C provide the interview protocols for our focus groups. Interviews were recorded and transcribed for each focus group. The transcripts were then independently analyzed and coded by two raters according to the categories shown on Appendix D. Data, including verbatim quotations from participants, were then transferred to coding forms. Finally, data from each rater was reviewed and consolidated into a research summary for each of the research sites. Additional data from interviews with district leadership staff and any available research reports documenting the specific initiative were incorporated into the summaries.

Data from a complementary case study in Charlotte-Mecklenburg, North Carolina—the Opportunity Culture (OC) Initiative—was gathered from multiple sources. These included memoranda, interviews



and case studies by Public Impact staff between September, 2013, and July, 2015, and our interviews with the Director of the OC Initiative in the Charlotte-Mecklenburg Schools (CMS).

Limitations of our methodology include the fact that much of the data consists of self-reporting by individuals selected by the district to participate in the focus groups. Although we cannot fully judge how representative the groups were of the school populations as a whole, the range of feedback we received (both positive and negative) and triangulation of responses from various focus groups and interviews (and in certain instances, references to external evaluation reports or impact data) suggest our findings are sufficiently valid for the conclusions we have made in this report.

Table 3 provides a visual representation of the methodology of this research study.

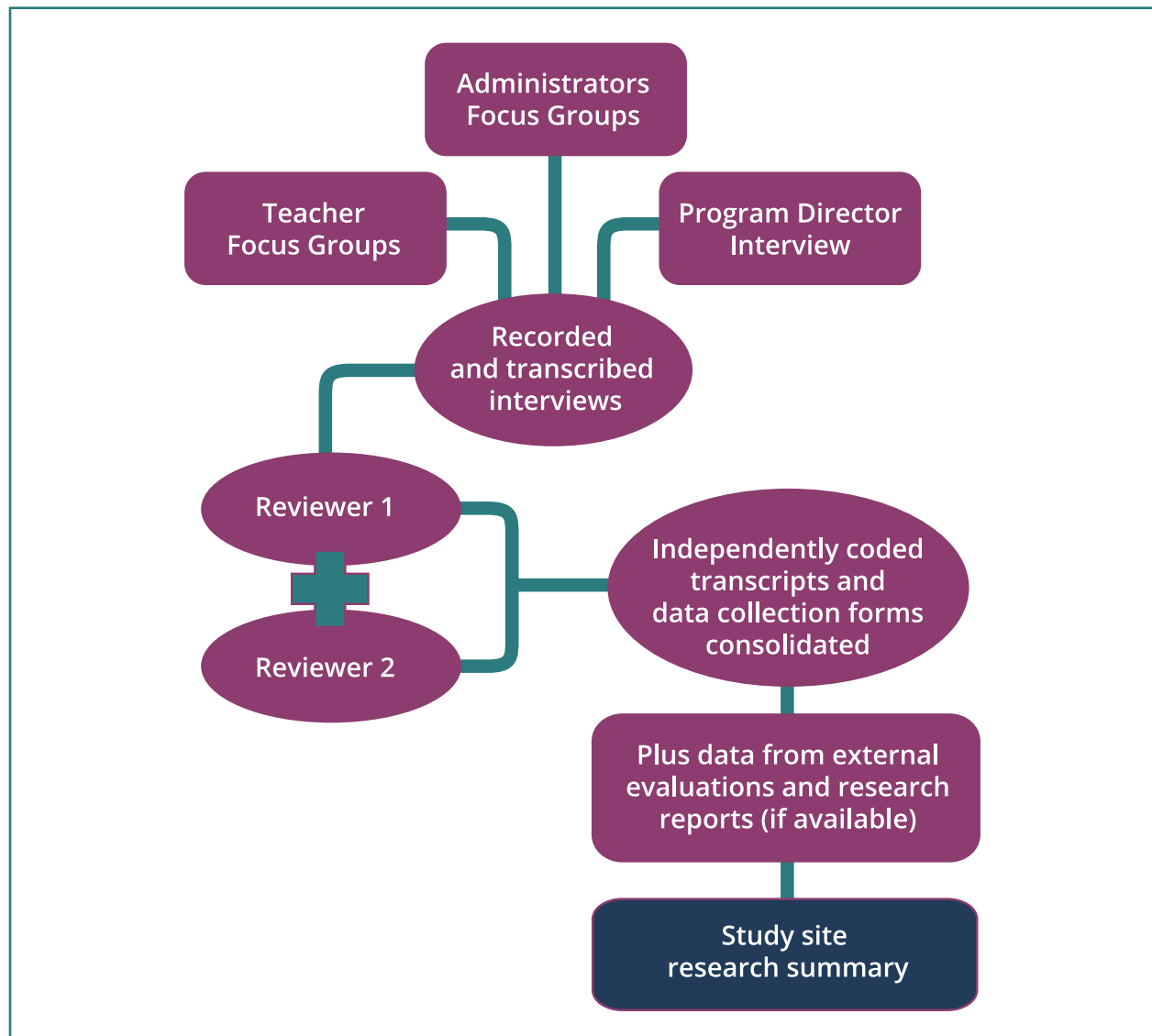


Figure 3. Study Methodology

Appendix B: Interview Questions for Teachers

1. What benefits have teachers seen with this new career advancement structure? What evidence do you have of these benefits?

Prompt: Has the initiative made you more satisfied with your job as a teacher? Your desire to continue working in your school/district? Your desire to continue working as a teacher? Your interest in pursuing other career options as an educator?

2. How has this initiative impacted your own professional growth and your effectiveness as an educator? What evidence do you have?
3. What issues or concerns do you have about this initiative?
4. How were teachers involved in the development of this initiative? In its implementation?
5. How would you describe the process in terms of opportunities for teachers to participate in different roles and the selection process?
6. Has this initiative changed the way you interact with your administrator/principal? How?
7. Has this initiative changed the way you interact with your colleagues? How?
8. Do you think this initiative will be sustained over time? Why or why not?
9. Do you think this initiative makes your school/district a more desirable place to teach?
10. What impact has this had on recruiting teachers to work in your district? In retaining highly effective teachers in your district?
11. Do you feel better supported as a result of this initiative? Please describe.
12. What have been the greatest benefits for students?
13. What have been, in your view, the greatest benefits for administrators?
14. How could this initiative be improved?



Appendix C

Interview Questions for Administrators

1. Describe the teacher career advancement initiative in your school/district. How long has it been in place?
2. Is your continuum model currently in the theoretical stage, or have you operationalized it?
3. What was your school/district's motivation for instituting a teacher career advancement initiative?
4. Who was involved in designing/adapting this model in your school/district?
5. What research was examined in creating the model?
6. Describe your model:
 - a. How many stages are in your model?
 - b. How are teachers moved across those stages?
 - i. Is there an assessment involved to move from stage to stage?
 - ii. What evidence must a teacher provide to show that s/he is ready to move to a new stage?
 - iii. Who determines when a teacher is ready to move to a new phase?
 - c. Is each stage subject to differential compensation? Are there other forms of differential compensation in this model?
 - d. Is each stage tied to a change in licensure?
 - e. Do teachers receive release time to work on assessments, projects, or other vehicles required to move across stages?
7. How did you prepare your faculty for this change?
8. How has this initiative been funded?
9. What was the biggest barrier your school/district had to overcome?
10. What key benefits has your district observed for students and teachers after this initiative has been adopted? What evidence do you have of these benefits?
11. What kinds of issues has your school/district encountered with school board members? Unions/teachers associations? Building level administrators? Parents? Community members? Teachers? Were you able to resolve the issue, and if so, how? (This last question applies to each issue described)
12. Do you have a vision for expanding/sustaining this teacher career advancement initiative?
13. Has this initiative impacted teacher retention? Teacher recruitment? (if so, what kind of data do you have to support this answer?)
14. What are your suggestions for improvement of this initiative?
15. If this plan has been operational for a period of time, add the following questions:
 - a. What impact has this initiative had on school culture (i.e., teachers willingness to share practice, work in teams, relations between teachers and administrators)?
 - b. What did it look like before? What did it look like afterwards?

Appendix D

Continuum Study Sites—Qualitative Data Coding for Interviews

(PD) Program Description

(see also program documents)

(e.g., PD-f)

- (cs) Continuum stages
- (ca) Criteria for advancement along stages of continuum
- (pc) Peer coaching/peer evaluation
- (f) Funding
- (tc) Teacher compensation policy
- (rt) Released time policy
- (o) Other

(StP) Stakeholder participation in design and implementation (e.g., StP-a)

- (t) Teachers
- (a) Administrators
- (u) Teacher associations/unions
- (p) Parents
- (c) Community members
- (o) Other

(TB) Teacher Benefits/Teacher Issues (TI) ***(e.g., TB-js or TI-co)***

- (pd) Professional development
- (sa) Student achievement (impact upon)
- (oc) Opportunities for collaboration (time, space, scheduling)
- (tv) Teacher voice in decision-making
- (js) Job satisfaction
- (tjr) Teacher job restructuring/differentiation in roles
- (r) Recognition
- (c) Career options
- (o) Other

(DB) District Benefits/District Issues (DI)

- (tr) Teacher recruitment
- (tt) Teacher turnover
- (te) Teacher effectiveness
- (sa) Student achievement
- (tar) Teacher/administrator relations
- (dar) District/teacher association relations
- (o) Other

(SC) School culture (e.g., SC-ci)

- (se) Student engagement
- (sd) Shared decision-making
- (ci) Collegial interaction
- (ptr) Principal/teacher relations
- (pi) Parental involvement
- (ci) Community involvement
- (o) Other

(PI) Program Improvement/Sustainability ***(e.g., PI-ss)***

- (fe) Funding enhancements
- (ss) Stakeholder support
- (ta) Technical assistance
- (ep) External partners
- (o) Other

Appendix E

Teacher Career Pathways Study Sites “At a Glance”

| | ASPIRE Summit Charter Academy, Modesto, California | Denver, Colorado | District of Columbia | Knox County, Tennessee | Scottsdale, Arizona | Seattle, Washington | Southeast Polk, Iowa | Charlotte-Mecklenburg, North Carolina |
|---|---|--|--|---|--|--|---|---|
| Name of initiative | “The College Ready Promise” (TCRP) initiative | Denver Differentiated Roles (DR) Pilot | DC Leadership Initiative for Teachers (LIFT) | Knox County TAP (System for Teacher and Student Advancement) | Scottsdale Career Ladder Program | Seattle Career Ladder Program (SCLP) | SPCSD Teacher Leadership and Compensation (TLC) Program | Opportunity Culture (OC) Initiative |
| Type of initiative | school-based (part of Aspire charter management organization) | voluntary participation by schools | district-wide | voluntary participation by schools | district-wide | voluntary participation by schools, but 94 of 97 schools participating as of the 2015-16 school year | district-wide | voluntary participation by schools with effort to scale to as many as half of schools |
| School community characteristics | 405 students; majority Hispanic, Asian, African American, or unspecified; 17% White | urban; 90,000 students; diverse student body | urban; 47,000 students; 88% black, Hispanic or other non-white ethnicity | regional, 87 schools; 55,000 students; majority white ethnicity (77%) | suburban; 31 schools; 26,000 students; majority white ethnicity | urban; 52,000 students; 48% African-American, Hispanic, Asian or other non-white ethnicity | suburban; 6500 students; majority White | county-based school district, 164 schools, 145,000 students; 42% African-American; 18% Hispanic, 40% white or other |
| Duration of program | 2011-12 pilot launched to present | 2013 pilot with 11 schools/28 Career ladder teachers (CLTs); 93 schools and 240 CLTs in 2014-15; by 2017-18, expectation most schools will participate | 2012-2013 launched to present | 2006-07: 4 schools; 2010-11 expanded to 18 schools | 1994 first implemented; phase-out by 2014-15 school year (judicial and legislative action) | 2011-12 launched; 93 schools/240 teachers as of 2014-15 school year. | 2014-15 first year of implementation | Piloted in 2013-14 in 4 schools; expanded to 20 schools in 2014-15; and 23 in 2015-16. |

| | ASPIRE Summit Charter Academy, Modesto, California | Denver, Colorado | District of Columbia | Knox County, Tennessee | Scottsdale, Arizona | Seattle, Washington | Southeast Polk, Iowa | Charlotte-Mecklenburg, North Carolina |
|---|--|--|--|--|--|---|---|--|
| Funding | i3 development grant in 2011; 2013-14 five year TIF grant to serve 29 Aspire schools | 5-year TIF grant with general funds providing supplemental funding | 2010 Race to Top funded IMPACT (teacher evaluation system); 2012 TIF grant funded IMPACT and LIFT (including base salary increases) | 2010 TIF grant to NIET to expand TAP in Knox County | State funding initially; local tax levy until phase-out of program | \$12.5 TIF grant providing funding for SCLP program for first 2 years; now fully funded through school baseline funds | Iowa Teacher Leadership and Compensation grant (3 yr) \$2.2 million plus some local funds | Existing school operating funds cover additional pay, with some other initial start-up costs funded by district and foundation |
| Teacher leader roles | Entering Emerging Effective teacher Highly effective teacher Master leader | Team lead; senior team lead | A variety of district- and school-based roles based on LIFT career stages— e.g., advising district leaders, writing curriculum, grade-level or department chair; pilot of hybrid teaching/coach role in 2015-16. | Career teachers Mentor teachers Master teachers Executive master teachers | 4 career stages: Entry level Professional level 1 Professional level 2 Professional level 3 | Model teacher, instructional coach, curriculum & professional development leader | Demonstration teacher, mentor teacher, master teacher | Multi-classroom leader and direct reach teacher (e.g., blended learning teacher, elementary-specialist teacher, expanded impact teacher) |
| Teacher leader #s or participation stats | 11 of 20 teachers in leadership roles or 55% of teaching staff | 40 out of 185 schools participating as of 2014-15; 72 schools in 2015-16 | 160 LIFT ambassadors; all teachers eligible for district-based leadership roles; as of 2014-15, 772 of 3,769 teachers participating in LIFT leadership roles; additional teachers in school-based roles | 18 of 87 schools participating | Initially voluntary; all new hires after June, 1994; teachers may voluntarily exit from CLP. In 2014-15-600 teachers participating in Career ladder program. | 25% of total teaching staff | 93 schools and 240 teachers in 2014-15 school year | 46 MCLs, 37 direct reach teachers in 2014-15 |

| | ASPIRE Summit Charter Academy, Modesto, California | Denver, Colorado | District of Columbia | Knox County, Tennessee | Scottsdale, Arizona | Seattle, Washington | Southeast Polk, Iowa | Charlotte-Mecklenburg, North Carolina |
|---|--|--|--|--|--|---|--|---|
| Teacher leader compensation | Lead Teacher: \$2500 Other roles: \$1000-\$1500 | Team lead: \$3,000 stipend Senior team lead: \$5,000 stipend Non-DR roles: \$1,000 stipend | Extra pay for LIFT leadership roles varies by specific role, usually in the \$1,000 - \$5,000 range. This is in addition to the LIFT salary schedule which provides bonuses for highly effective teachers: in high poverty schools up to \$20,000; in non-Title I schools up to \$3,000. | Mentor teacher: \$2,500 stipend plus payment for 11 additional contract days (Total \$4,000-\$4500 Master teacher: \$6,000 plus payment for additional 21 contract days (\$10,000-12,000) | Salary schedule incorporates a point system-based compensation schedule for teachers with "Higher Level Teaching Responsibilities" with increments up to \$4,000 | Model teacher: \$2,000 incl. 5 extra contract days; Instructional coach: \$7,000 incl. 10 extra contractual days; Curriculum and PD leader: \$12,000 incl. 15 extra days | Demonstration teacher: \$2,500 stipend Mentor teacher: \$3,500 stipend Master teacher: \$5,200 stipend | Multi-classroom teacher leaders: \$13,000 to \$23,000 depending on the numbers of students reached and the number of teachers on the leader's team. Direct reach teachers: \$6,000 to \$9, |
| Released time status of teachers | Peer observers receive full-day substitute coverage every 2 weeks; released time for teachers to collaborate and observe each other's classrooms; beginning in 2015-16, piloting of hybrid teaching/coaching roles | Team leads released 50 % of time for coaching and evaluation work | Optional, based on discretion of principal. | Mentor teachers—minimal released time; master teachers released full-time or close to full-time | Career ladder teachers full-time with some released time; peer evaluators released full-time for a 3 year period | Model teachers: full-time teachers; other roles: 100% released | All are full-time teachers with each school getting 10 substitute days to support CLTs | Multi-classroom leaders continue to teach, but with re-structured schedules averaging 350 minutes per week to plan and work with teams of teachers. |

| | ASPIRE Summit Charter Academy, Modesto, California | Denver, Colorado | District of Columbia | Knox County, Tennessee | Scottsdale, Arizona | Seattle, Washington | Southeast Polk, Iowa | Charlotte-Mecklenburg, North Carolina |
|--|---|---|---|--|--|---|---|--|
| Eligibility/ Selection criteria | Based on Aspire evaluation system using TCRP Framework. Effectiveness levels tied to different opportunities on career ladder and compensation. | Effective/highly effective rating on district evaluation framework; interview | Career stages and leadership roles dependent upon IMPACT ratings, including observations, value-added growth data and student growth data on school-based goals. Teachers must apply and be selected for these district-based positions. Selection criteria vary based on role. | Formal application process, panel interview, essay (later replaced by Insight Gallup survey), and principal interview. Mentor applicants may express preference for school. Master teachers interviewed by district panel. | Career ladder placement based on (1) evaluation of teacher performance using Teacher Performance Assessment Instrument (TPAI) and Career Ladder Instrument (CLI), (2) pupil progress using Student Performance Instrument (SPI), and (3) Higher Level Teaching Responsibilities (HLTR) see note below ¹⁶ | Application, interview, writing samples | Principal evaluations; student growth ratings; application process including interview team | Prescreened for a district pool based on evidence of leadership and strong evaluation history, including student growth. Principals interview based on behavioral competencies linked to specific roles. |
| Peer coaching/ evaluation | peer coaching | peer coaching and peer evaluation | peer coaching | peer coaching and peer evaluation | peer coaching and peer evaluation | peer coaching only | peer coaching only | peer coaching |

¹⁶ Little explanation was provided about the selection process for Scottsdale peer evaluators, other than a written assessment and a test.

| | ASPIRE Summit Charter Academy, Modesto, California | Denver, Colorado | District of Columbia | Knox County, Tennessee | Scottsdale, Arizona | Seattle, Washington | Southeast Polk, Iowa | Charlotte-Mecklenburg, North Carolina |
|--|--|--|---|---|---|---|---|--|
| Defining positive characteristics of initiative | Positive school culture and enthusiasm of teachers for opportunities for professional growth and collaboration; options for teachers to cycle in and out of leadership positions; teachers have voice in decision-making | Significant building-level discretion in implementation of DR pilot; goal of transforming school structures with fewer administrative or non-instructional roles | Retention of highly effective teachers; motivation and job satisfaction increased due to LIFT leadership opportunities and IMPACT salary structures. | Embedded professional development, peer coaching and TAP instructional rubric. Teacher voice in decision-making. Incentives for recruitment. | Creation of culture of high expectations; significant collaboration and collegial interaction; high levels of transparency and trust; recruitment tool; performance pay system regarded as fair | Strong levels of stakeholder support in design of initiative; strong vision and “readiness” of district | Building-level flexibility in implementation; positive recruitment tool; more collaboration between CLTs and administrators | Teachers lead and reach more students while teaching; more pay for more responsibility paid for within existing school budgets. Teachers participate in designing OC within their schools. Early data suggests higher student growth in OC classrooms. |
| Defining issues/challenges | Adequacy of compensation to attract enough teachers to school; adequacy of time to manage all responsibilities and maintain work/home balance; | Building level leadership critical to success of initiative; importance of released time to success of initiative; alignment of culture and expectations in schools. | Some perceptions of unfairness based on IMPACT ratings system and financial incentives disproportionately going to Title I school teachers; LIFT only applicable to classroom teachers. | Teacher turnover at school level due to promotions or movement away from TAP schools; significant demands on principals in TAP schools; reported burnout of some mentor teachers; funding continuity. | Phase out of program resulting in loss of compensation for teachers (and loss of teachers to other districts); feeling of less appreciation and respect for their work; uncertainty whether collaborative culture will be maintained. | Need for better definition of “model teacher role; need for more “buy-in” from some veteran teachers | Adequacy of time for collaboration; boundaries of responsibilities for CLTs unclear; lack of support for CLTs to meet together; turnover of CLTs as a result of moving to different positions | Adequacy of time for OC teachers to carry out their responsibilities, particularly when schools transition into OC model gradually; there is a need to better match team leader evaluation to their expanded reach roles. |

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