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The Merit of Merit Pay

by

Melissa May Pemberton Albright

May 2011

A Dissertation submitted to the Education Faculty of Lindenwood University in
partial fulfillment of the requirement for the degree of

Doctor of Education

School of Education

The Merit of Merit Pay

by

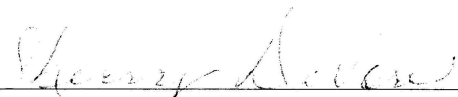
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This Dissertation has been approved as partial fulfillment

of the requirements for the degree of

Doctor of Education

Lindenwood University, School of Education



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Declaration of Originality

I do hereby declare and attest to the fact that this is an original study based solely upon my own scholarly work at Lindenwood University and that I have not submitted it for any other college or university course or degree.

Full Legal Name: Your Full Name as it appears in University Records

Signature: Melissa Mary Probert Albright Date: 3-25-11

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Abstract

The purpose of this study was to examine the perceptions of Missouri educators and state education leaders toward merit pay. In addition, a secondary purpose of this study was to examine the perceptions of educators on the impact of merit pay on recruiting and retaining highly-qualified teachers. Due to the current economic situation, districts are looking at ways to compensate teachers while recruiting and retaining highly-qualified teachers. Districts must continue to meet federal and state mandates to increase student achievement, and researchers have identified teacher quality as one such influence. Therefore, many believe the traditional salary schedule, which has been the predominate method of paying teachers for many years, is outdated and ineffective. In this study, the history of the traditional salary schedule, successful and unsuccessful merit pay programs, legislation, and alternatives to merit pay were examined. Utilizing a mixed-methods design, 219 surveys and 10 interviews were conducted. The survey return rate was 22% resulting from distributions of the surveys at the fall conferences of the MNEA and the MSTA. Additional surveys were distributed in two schools. A *t*-test was conducted to determine if perceptions of tenured and non-tenured teachers were different. The results of the surveys indicated Missouri educators and two educational organizations are overwhelmingly opposed to merit pay. Interviews revealed state education leaders are divided in their support of merit pay. The study disclosed a desire for all educators to be at the table as compensation plans are discussed, allowing for all parties to be involved in the decision process.

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Chapter One: Introduction

Background

Due to the current economic crisis, education budgets in public schools have been fractured, resulting in dramatic cuts in personnel and programs. Compounding this issue are the federal and state mandates to increase student achievement. Researchers conducting studies on teacher quality have overwhelmingly and consistently shown teacher quality determines student success (Marzano, 2007; Marzano, Pickering, & Pollock, 2004; Schmoker, 2006; Stronge, 2002; Stronge, 2007; Stronge & Hindman, 2006). Education Secretary Duncan (as cited in Quaid, 2009) stated, "What you want to do is really identify the best and brightest [teachers] by a range of metrics, including student achievement," (para. 13). Marzano (2007) linked teacher effectiveness to understanding each student's weaknesses and strengths. At the same time, many of the nation's school districts are finding it increasingly difficult to attract and retain highly-qualified teachers (Adams, Heywood, & Rothstein, 2009). One of Senator Obama's (2008) promises during his campaign for President was:

Teachers should be better compensated, with both a more competitive base salary for well-prepared and successful teachers and professional compensation systems designed with the help and agreement of teachers' organizations. Compensation systems can provide salary incentives for demonstrated knowledge, skill and expertise. (para. 2)

Therefore, a challenge facing school districts is to offer ample compensation to attract quality teachers. One viable option to consider is merit pay.

At one time, teachers [females] left the field to get married and have a family; however, they are now leaving the profession due to the limited earning potential in relation to the myriad challenges and frustrations inherent in the job (Moulthrop, Calefari, & Eggers, 2005). In addition, the National Education Association (NEA) reported 50% of all new teachers leave the profession within five years (Lambert, 2006). Beginning teachers identified they leave the profession due to working conditions and salaries (Lambert, 2006). In Missouri, this problem is even more pronounced since the state is currently ranked 46th nationwide in salaries (NEA, 2009b).

In the forward of the book, *The Peril and Promise of Performance Pay* (Gratz, 2009a), William Slotnick reported the public's call for higher student achievement results is providing a political and leadership opportunity for public officials. Slotnick, the founder of the Institute for Teacher Compensation and School Improvement, stated this opportunity has led to "greater interest in forging a stronger link between the goals of school districts (to improve student achievement) and their budgets (where more than eighty percent of the operating budget is spent on compensation)" (Gratz, 2009a, p. v). Similarly, President Obama stated:

The future belongs to the nation that best educates its citizens. We have everything we need to be that nation ... and yet, despite resources that are unmatched anywhere in the world, we have let our grades slip, our schools crumble, our teacher quality fall short and other nations outpace us. (Quaid, 2009, para. 4)

Legislators in the state of Missouri have experimented with several methods to incorporate extra compensation for educators. Missouri educators have earned extra pay

through the Career Ladder program by completing required tasks with benefits ranging from \$1500-\$5000 (Missouri Department of Elementary and Secondary Education [MODESE], 2009). The purpose of the Career Ladder program was to reward educators for extra academic activities (MODESE, 2010). Any educator who met the criteria could choose to participate in the program and complete a career development plan listing the academic activities which would be performed outside contracted time (MODESE, 2010). Meeting criteria at each level allowed an educator to progress through the three stages of the Career Ladder program (MODESE, 2010).

During the 2008-2009 school year, 17,958 of Missouri's 70,689 public school teachers, representing two-thirds of Missouri's 523 school districts, received extra pay from the Career Ladder program (Lieb, 2010). However, this program was eliminated due to financial shortfalls in the state (Crump & Nolan, 2010). The chairman of the House and Senate budget committees, Mayer, a Republican from Dexter, Missouri, warned education officials in 2009 there was no guarantee the Career Ladder program would be funded in the next budget (Lieb, 2010).

Missouri Senate Bill 42, approved in February 2010 by the Senate, would have allowed teachers in the St. Louis Public Schools to earn incentives based on performance (Heavin, 2009). Over \$5 million dollars of state funding would have been necessary for this bill to be implemented (Heavin, 2009). However, state funding was not available and the legislation was not enacted. Teachers in St. Louis would have had the option to participate but would have had to give up tenure for incentives worth up to \$15,000 per year (Heavin, 2009).

With education budgets decreasing and the election of a president who believes teachers should be paid for knowledge and skills, the push for merit pay is gaining momentum (Obama, 2008). More and more states are looking into alternative compensation methods. With no other plan in place, merit pay may offer a viable option for educational personnel.

Theoretical Frameworks

There are several theories relating to motivation and job satisfaction (Herzberg, Mausner, & Snyderman, 1959; Maslow, 1943; McGregor, 1960; Pink, 2009). Guiding this study was the motivation theory espoused by Herzberg, Mausner, and Snyderman (1959). Herzberg et al. (1959) divided work-related motivation into two-factors: hygiene factors and motivation factors. Hygiene factors affect the level of dissatisfaction and were identified by Herzberg et al. (1959) as: “supervision, interpersonal relations, physical working conditions, salary, company policies and administrative practices, benefits, and job security” (p. 113). Herzberg et al. (1959) found job dissatisfaction occurs when the aforementioned factors deteriorate below what an employee considers satisfactory. Through research, Herzberg et al. (1959) identified achievement, advancement, recognition, and responsibility as motivators for employees if found in the work place. Herzberg et al. (1959) found two separate needs, the need to avoid unpleasantness and discomfort (job dissatisfaction) and the need for personal development (job satisfaction), exist in the area of motivation and job performance.

For a positive job attitude to occur, hygiene and motivation factors must fulfill the employee and meet the need for self-actualization (Herzberg et al., 1959). Self-actualization is a key component of Maslow’s (1943) hierarchy of needs and is defined as

reaching the fullest potential possible. Self-actualization is never reached unlike the lower level needs of safety, love, and acceptance (Maslow, 1943). There are always opportunities for continued growth resulting in the top of Maslow's hierarchy never being fully achieved (Maslow, 1943).

Herzberg et al. (1959) confirmed job dissatisfaction occurs as a result of undesirable working conditions, bad company policies, and poor management. Money can be a motivational tool for some people, as well as recognition, achievement, advancement, and interesting work (Herzberg et al., 1959). Herzberg et al. (1959) defined salary as a category which encompasses, "all sequences of events in which compensation plays a role. Surprisingly...these involve wage or salary increases, or unfulfilled expectation of salary increases" (p. 46). Therefore, Herzberg (as cited in Chapman, 2001) proposed, "We can expand...by stating that the job satisfiers deal with the factors involved in doing the job, whereas the job dissatisfiers deal with the factors which define the job context" (para. 12). Herzberg et al. (1959) determined "it would seem that as an affector of job attitudes salary has more potency as a job dissatisfier than a job satisfier" (p. 82).

Merit pay could lead to dissatisfaction or satisfaction. Herzberg et al. (1959) believed many times salary increases are obtained grudgingly, received after an employee thought it should have been earned or when new employees entered the work place with higher wages than older, more experienced employees. Herzberg et al. (1959) commented, "Salary revolves around the unfairness of the wage system within the

company” (p. 83). Herzberg et al. (1959) concluded:

Salary was mentioned...as something that went along with a person’s achievement on the job. It was a form of recognition; it meant more money; it meant a job well done; it meant that the individual was progressing in his work. Viewed within the context of the sequences of events, salary as a factor belongs more in the group that defines the job situation and is primarily a dissatisfier. (p. 83)

Conversely, Gratz (2009a) argued there are no accepted theories of worker motivation left to indicate humans are motivated primarily by extrinsic factors. Herzberg (1968), through additional research, found:

The motivation-hygiene theory suggests that work be enriched to bring effective utilization of personnel. Such a systematic attempt to motivate employees by manipulating the motivator factors is just the beginning. The term job enrichment describes this embryonic movement...job enrichment provides the opportunity for the employees’ psychological growth. (p. 31)

Herzberg (1968) asserted not all jobs can be enriched, nor should be. However, very little time and money are devoted to job enrichment efforts in the workplace. If the focus were on human satisfaction and economic gain, then industry and society would reap large dividends through their efforts at better personnel management (Herzberg, 1968).

Statement of Problem

The topic of merit pay continues to be in the headlines. The current financial outlook for school district budgets does not look favorable, and decisions regarding salaries need to be examined. Due to the financial issues currently facing districts, most

education personnel are not receiving salary increases. Missouri Governor Nixon cut \$19,606,649 from the 2010-2011 fiscal budget, or 7.7% of the money the MODESE was to receive to balance the budget, as required by law (Essig, 2009). In April 2010, Governor Nixon cut additional money from the budget; more than \$900 million from the \$23.7 billion budgeted for the fiscal year 2011 (Associated Press, 2010b). During a struggling economy, schools and students are directly affected by budget reductions. Gratz (2009a) acknowledged, since the 1950s, Americans have connected failure in the economy and lifestyle with crisis within the schools. This belief, according to Gratz (2009a), highlights the "...role Americans believe public schools play in civic and economic life: when the economy is doing poorly, is changing, or is stressed...the actions of the school and test scores of students are directly associated with those problems" (p. 31).

In 2009, as a result of financial issues, the Missouri legislature considered eliminating Career Ladder pay for approximately 18,000 teachers in the 348 participating school districts (Crump, 2010; MODESE, 2009). The state legislature did, in fact, eliminate the state contribution to the Career Ladder program for the 2010-2011 school year forcing districts to decide whether to fund the total amount, discontinue the program, or reduce requirements (Crump, 2010). Many school districts have reduced their budgets to fulfill obligations and are unable to provide raises (Williams, Oliff, Singham, & Johnson, 2010). Rural schools may struggle to offer competitive salaries and retain highly-qualified staff members as salaries across the state vary (Scavongelli, 2003). The Associated Press (2009) reported the minimum teacher's salary for Missouri was \$24,000 for the 2009-2010 school year. The minimum salary requirement increased to \$25,000 for

the 2010-2011 school year but will remain until Missouri Statute §163:172 is revised (State Aid, 2009). The current salary structure is outdated and ineffective resulting in discussions regarding the establishment of a merit pay system for teachers (Missouri State Board of Education Meeting, 2009). As a result of the financial issues facing school districts, many are not providing cost-of-living raises or earned steps on salary schedules. Districts are looking for ways to pay their staff members as budgets continue to decrease.

Purpose of the Study

The primary purpose of the study was to examine the perceptions of teachers and administrators toward the merit pay system. A mixed-methods design was utilized to conduct this study. This was accomplished through the distribution of surveys (see Appendix A) and interviews (see Appendix B) with Missouri educators.

Surveys were distributed to educators across the state. The group surveyed included certified public school teachers, superintendents, assistant superintendents, principals, assistant principals, and directors. The quantitative data were collected from the surveys. In addition, responses of a random sampling of tenured teachers and non-tenured teachers were examined to determine if the perceptions of the two groups varied.

The perceptions of state-level educational leaders were also examined in regard to merit pay. This was accomplished through interviews via electronic mail or phone. This group included leaders in the three professional organizations in Missouri: Missouri American Federation of Teachers (MAFT), Missouri State Teachers Association (MSTA), and Missouri National Education Association (MNEA), as well as state school board members and legislators. The qualitative data were collected from the interviewees' responses.

The secondary purpose of this study was to examine the perceptions of educators on the impact of merit pay on recruiting and retaining highly-qualified teachers. The data were collected from the open-ended questions from the surveys and interviews. Results were divided into two categories, recruitment and retention, to determine whether educator perceptions varied on the impact of merit pay in each of the categories.

Research Questions

The following questions guided this study:

1. What are the perceptions of teachers toward merit pay?
2. What are the perceptions of school administrators toward merit pay for teachers?
3. What are the perceptions of state education leaders toward merit pay for teachers?
4. What are the perceptions of professional organization presidents and legislative directors toward merit pay for teachers?
5. What are the perceptions of educators on the impact of merit pay on recruiting future educators?
6. What are the perceptions of educators on the impact of merit pay on retaining highly-qualified teachers?

Significance of Study

On May 29, 2007, the Missouri Supreme Court upheld Article 1, Section 20 of the Missouri Constitution which stated, “Employees shall have the right to organize and bargain collectively through representatives of their choosing” (Jung, 2007, para. 3). As a result of this ruling, school boards across Missouri have begun to bargain salaries,

working conditions, merit pay options, and other areas of concern. Changing the current salary structure will impact future retirement benefits for all educators, and with the current financial issues facing school districts, salary is an immediate concern for those nearing retirement.

Knowledge of the positive and negative aspects of merit pay may allow for aspiring educators to make a decision regarding entering the teaching profession. Aspiring educators, teachers, administrators, school boards, community members, and legislators may develop a clearer understanding of merit pay as a result of this study. Administrators may be able to utilize the information gathered and apply the knowledge to attract and retain highly-qualified teachers in educational settings through methods to enhance employment benefits and salaries. Community members will benefit from the added industry which moves into areas known for outstanding schools (Stanton, 2010). In addition, a high-quality education will benefit residents as students become productive citizens. Members of the legislature may gain knowledge vital for the introduction of legislation in regard to merit pay. Through this study of merit pay, new ways to compensate educators and establish professional wages to education personnel may be established allowing school districts to attract and retain highly-qualified teachers.

Limitations of the Study

The following limitations were identified in this study:

1. Not all surveys were returned.
2. Not all educators in the state of Missouri were surveyed.
3. The research was limited to one state.
4. The research was conducted by one researcher.

5. Researcher bias could enter into the data analysis.
6. Access to individuals completing the surveys and interviews was limited.
7. Surveys were distributed at teacher conferences and two schools hosting in-service meetings thus limiting participation of educators.
8. Data collection instruments, surveys, and interviews may have had some degree of error.
9. Some participants did not answer all questions.

Assumptions

The following assumptions were identified in this study:

1. All surveys were completed honestly.
2. All interview questions were answered honestly.
3. All surveys were completed by certificated Missouri public school personnel.

Definition of Key Terms

To better understand the educational terminology in this study, the following terms were defined. These terms are common language used in discussions, articles, and legislation regarding merit pay. The definitions were selected based on the multiple references of the terms as research was conducted. The following terms are defined:

Alternative compensation. The primary method of compensating an employee or extra pay added to a base salary. Common alternative names include merit pay and pay-for-performance (NEA Department of Collective Bargaining and Member Advocacy, 2008a).

Merit pay. Another term used for describing performance-related pay. Through a merit pay system, bonuses are provided for workers who perform their jobs superior to other employees using a measurable criteria (Webster's Dictionary, 2010).

Performance pay. Earnings are linked to some measure of performances such as student outcomes (test scores) or employee evaluations (Adams et al., 2009).

Starting salary. The beginning step of a salary schedule in which the employee has no experience (NEA Department of Collective Bargaining and Member Advocacy, 2008c).

Traditional salary schedule. A salary grid showing steps and lanes. Steps are based on longevity (years of service) with lanes based on coursework or advanced degrees. Also known as single salary schedule (Gratz, 2009a).

Summary

Public perception and accountability issues concerning student achievement, teacher quality, and pay have been concerns for some time (Educator Compensation Institute, 2007; Marzano, 2007; Marzano et al., 2004; Schmoker, 2006; Stronge, 2002; Stronge, 2007; Stronge & Hindman, 2006). Additional issues facing educators include: recruiting and retaining highly-qualified teachers, financial struggles, and teacher accountability. As a result of the changing economy and the election of a president who supports merit pay, the traditional salary schedule is considered outdated and ineffective (Essig, 2009; Missouri State Board of Education, 2009; Obama, 2008).

Herzberg et al. (1959) found motivation can be split into two factors: hygiene and motivation. Herzberg et al. (1959) studied people's attitudes toward their jobs and identified both satisfiers and dissatisfiers which directly impact an employee's

motivation. Salary falls into the category of hygiene factor and may not necessarily be a motivator. Merit pay is a form of compensation dependent upon achieving certain criteria to earn additional salary.

The primary purpose of this study was to examine the perceptions of teachers, administrators, educational leaders, and legislators toward the merit pay system. Due to increasing budgetary concerns and limited resources, school district leaders are examining different approaches and alternatives regarding salaries. With this in mind, the secondary purpose of this study was to determine if merit pay would have an impact on recruiting and retaining highly-qualified teachers. The results of this study may assist future educators, teachers, administrators, school boards, communities, and legislators in identifying alternatives to compensate and establish professional wages for the educational workforce.

In Chapter Two, a review of relevant literature was discussed and included an examination of successful and unsuccessful merit pay plans. Chapter Three included an overview of the research methodology including the creation of the survey and interview questions. An analysis of the data and summary of the findings were presented in Chapter Four and Chapter Five.

Chapter Two: Review of Literature

Legislators, educators, and community members continue to examine the structure of the educational system. Teacher evaluations, tenure, salaries, student performance, and hard-to-staff schools are issues currently facing stakeholders (Barker & Searchwell, 2010; Fullan, Hill, & Crevola, 2006; Marzano & Kendall, 2008; Odden, 2009, Stronge, Gareis, & Little, 2006). One major issue revolves around teacher salaries and merit pay (Adams et al., 2009; Allegretto, Corcoran, & Mishel, 2008; Gratz, 2009a; Johnson & Papay, 2009; Schlein, 2009).

The purpose of this study was to examine the perceptions of educators and educational leaders surrounding merit pay. Following a review of relevant literature, four overarching themes surrounding merit pay emerged: historical perspective, theoretical constructs, compensation methods, and legislation. Each theme was examined and subthemes surfaced.

Historical Perspective

Various forms of merit pay can be traced back to the 1700s in England when teachers were paid based on student proficiency in the areas of reading, writing, and arithmetic (Gratz, 2009a). With the evolution of the British school system, the methods of education were modified and incorporated into the Revised Education Code of Britain of 1860, with merit pay lasting more than thirty years (Gratz, 2009a). During this time, education reconstruction was occurring; scholars debated whether schools should have a religious focus, and England was enduring an economic crisis (Gratz, 2009a). As a result of the reconstruction, four different plans for education were proposed (Gratz, 2009a). The most popular was the Newcastle Commission, in 1861, which required strict

inspection ensuring student learning; and soon after, subject testing began in Britain (Gratz, 2009a). Schools initiated paying teachers based on the success of their students, or pay based on merit (Gratz, 2009a). Due to public outcry, new curriculum adoptions, and negativity towards the schools the pay-for-performance system was replaced by unlimited autonomy for teachers (Gratz, 2009a).

Established in the United States in 1908, merit pay has been around for over a hundred years (Protsik, 1995). Little is known about the first plan created in Newton, Massachusetts (Protsik, 1995). The impetus for merit pay began in the 1960s in the aftermath of Sputnik and in the 1980s following the publication of the education report, *A Nation at Risk* (Gratz, 2009a; Johnson & Papay, 2009). The report recommended teacher salaries be “professionally-competitive, market-sensitive and performance based” (National Commission on Excellence in Education, 1983, para. 1).

The Teacher Incentive Fund (TIF) was launched in 2006 by President George W. Bush and the federal government (Gratz, 2009a). One-hundred million dollars were appropriated (Gratz, 2009a). This grant process was developed as a companion to *No Child Left Behind* (NCLB) and was aimed at encouraging experimentation with performance pay (Gratz, 2009a). The TIF grants are awarded to school districts that promise to develop and implement merit pay programs (Gratz, 2009a). The goals of TIF include:

- improving student achievement by increasing teacher and principal effectiveness;

- reform teacher and principal compensation systems so that teachers and principals are rewarded for increases in student achievement;
- increase the number of effective teachers teaching poor, minority, and disadvantaged students in hard-to-staff subjects; and
- create a performance-based compensation system. (Gratz, 2009a, p. 238)

According to the Center for Educator Compensation Reform (2010), there are currently 33 TIF grantees in various-sized districts. The majority of the merit pay programs in existence are comprised of these grantees (Center for Educator Compensation Reform, 2010). President Obama and the U.S. Department of Education continue to bolster the TIF program (Viadero, 2009c). President Obama has proposed funding to expand the current \$97.3 million annual funding to \$487.3 million, according to the U.S. Department of Education's (2009) budget summary. Under President Obama's proposed budget, student achievement must be the primary basis for any pay system (Viadero, 2009c). In September 2010, the U.S. Department of Education awarded a new round of TIF grants (Hacker, 2010). Texas was awarded more than \$248 million in federal grant money with money given to both charter and public schools to create or expand already existing pay plans in Houston and Fort Worth (Hacker, 2010).

Student achievement is an important element of the education process. Good teaching is one of the factors with the most important influence on student achievement (Moulthrop et al., 2005). Stronge and Hindman (2006) created the Teacher Quality Index, an interview protocol, to determine qualities of effective teachers. The protocol is built upon Stronge's (2002) earlier book, *Qualities of Effective Teachers*, which focused on

specific behaviors which contribute to student achievement including preparation, personality, and practices. In addition, Barton (2004) identified 14 factors related to student achievement. Of the 14 factors, eight occur before or outside school and include birth weight, hunger, parent availability, parent participation, and television watching to identify a few (Barton, 2004; Gratz, 2009a). The remaining six factors occur within school and pertain to curriculum, teacher preparedness, class size, technology, and safety (Barton, 2004; Gratz, 2009a). Low income and minority students are at a disadvantage in most of these areas; however, the aforementioned factors contribute to all students and their success (Barton, 2004; Gratz, 2009a).

Researchers have identified teacher quality as one of the most important aspects of school systems (Marzano, 2007; Marzano et al., 2004; Schmoker, 2006; Stronge, 2002; Stronge, 2007; Stronge & Hindman, 2006). Through high-quality teachers, student learning does improve. Best practices are the key to effective teacher quality (Schmoker, 2006). Although some disagree, test scores may provide valuable information for teachers and schools. This data may be used to make informed curriculum and instructional decisions including implementing best practices. The National Assessment of Educational Progress (NAEP) assesses students' knowledge and skills in various subject areas (National Center for Education Statistics, 2010). Subjects assessed include the basics: math, reading, writing, science, geography, and U. S. history (National Center for Education Statistics, 2010). Other areas in which assessments are given include the arts, civics, and economics (National Center for Education Statistics, 2010). The NAEP assessments are administered equally across the nation using the same test (National Center for Education Statistics, 2010). For consistency and analysis over time, the

assessment is essentially the same from year to year, with only minor changes (National Center for Education Statistics, 2010). According to the National Center for Education Statistics (2010), data can be used to compare states based on the average scaled scores for selected groups of students who attended public schools within a single assessment year. For 2009, Missouri ranked 26th in fourth grade math and 31st in eighth grade math (National Center for Education Statistics, 2010). Missouri was ranked 34th in fourth grade reading and 29th in eighth grade reading (National Center for Education Statistics, 2010). Test scores can provide valuable information to teachers and schools, thus, used to formulate curriculum and instructional decisions and to determine teacher effectiveness.

In addition to scoring low on the NAEP assessments, Missouri ranks even lower in teacher salaries. According to the NEA, the average teacher in the United States earned \$53,910 during the 2008-2009 school year, while Missouri ranked 44th nationwide with an average salary of \$44,712 (NEA, 2009a). In 2009-2010, the average salary in Missouri was \$45,317 which placed Missouri 46th nationwide, and the national average was \$55,350 (NEA, 2009b). State government officials want to increase teacher salaries to attract and retain highly-qualified staff and have initiated plans to do so (Editorial, 2010). Iowa's ranking shifted from 37th in 2007-2008 to 26th in 2008-2009 after state lawmakers set aside \$145 million for the traditional salary schedule in 2007 (Editorial, 2010). While gains were achieved, Iowa did not attain their targeted goal of 25th in the nation, as set by Governor Culver (Editorial, 2010).

Theoretical Frameworks

In the mid 1900s, motivational theorists identified two driving forces of human nature. The first drive was biological and the second drive was to seek reward and avoid

punishment (Pink, 2009). Later, Harlow (as cited in Pink, 2009) discovered man had a third drive. This third drive presented man with intrinsic rewards simply by performing the task. Deci, Ryan, and Koestner (1999) continued Harlow's research and discovered money, used as an external reward, caused the subject to lose intrinsic interest in the activity. Deci (as cited in Pink, 2009) stated, "One who is interested in developing an enhancing intrinsic motivation in children, employees, students, etc., should not concentrate on external-control systems such as monetary rewards" (p. 8). Pink (2009) pointed out rewards can often give one more of what one does not want and produce less of what one is after. Pink (2009) continued, "When used improperly, extrinsic motivators can have unintended consequences...science is revealing that carrots and sticks can promote bad behavior, create addiction, and encourage short-term thinking at the expense of the long view" (p. 49). If extrinsic motivation is the destination, some people will choose the shortest path to get there even if it means taking the low road (Pink, 2009).

Hurley (1985) identified two contrasting theories of motivation regarding how to motivate high performance in employees: the traditional economic theory and Taylor's scientific management theory. Hurley (1985) described the theories:

The traditional economic theory and Frederick Taylor's scientific management theory applied to the industrial workplace have argued that compensation (extrinsic reward) is the major motivator of employee behavior. The human relations school of thought; Maslow, McGregor, and Herzberg; asserts that pay is not the exclusive motivator or even the primary motivator of employees. These theories contend that extrinsic rewards do little in the areas of employee performance and job satisfaction and that a major emphasis should be placed on

concepts like collegiality and job enrichment; both of which are considered intrinsic rewards. These two views on whether performance is primarily intrinsically or extrinsically motivated are reconciled differently depending on the occupation and work environment involved. (p. 6)

One myth regarding merit pay is incentive pay improves performance, when in fact, individual incentive pay damages performance and challenges teamwork (Pfeffer, 1998; Ramirez, 2010). Employees are led to believe pay is related to having the right relationship or personality instead of one's actual performance (Pfeffer, 1998; Ramirez, 2010). Another myth implies people work for money; however, many people work for the satisfaction or accomplishment giving meaning to their lives (Pfeffer, 1998). Both of these myths are based on the economic model of human behavior in which people take jobs based on their expected financial return focusing on self-interest (Pfeffer, 1998).

Pay must be contingent on performance or individuals will not devote the time or energy to the job (Pfeffer, 1998). People want more out of their jobs than just money; they want to feel competent, effective, and admired and extrinsic rewards diminish intrinsic motivation (Pfeffer, 1998; Ravitch, 2010b). Herzberg's (Herzberg et al., 1959) motivation hygiene theory related directly to the aforementioned concept of reward verses money. Herzberg found, when present in the work place, the following factors motivate employees: achievement, advancement, recognition, and responsibility.

According to Pink (2010), "Science reveals a paradox about money and motivation" (para 10). If employees were paid enough, then the issue of money could come off the table allowing workers to focus on the job instead of worrying about salaries (Pink, 2009; Pink, 2010). Allowing intrinsic motivation, a reward of the activity itself,

results in a deeper learning, delighted customers, and knowledge of doing one's best (Pink, 2009). In the field of education, good teaching is not about money but about a sense of calling (Ramirez, 2010). Pink (2010) agreed with Ramirez and added, "Instead of fretting about paying their bills on an insufficient salary or scheming to get a small bonus, teachers could focus on the work they love" (para. 10).

Research has found teacher-student relationships are a key ingredient to student success as noted in the three-year study conducted in the Metropolitan Nashville School System by the National Center on Performance Incentives in 2010. One interesting result was identified about teacher-student relationships. There were significant gains for fifth grade students, in year two and three of the study which were not evident in any other grade level. The findings reflected fifth grade teachers, perhaps in self-contained classrooms or instructing the same students in multiple subjects, established relationships with students (National Center on Performance Incentives, 2010). This is one element of teacher quality which determines student success and is not related to salary (Marzano, 2007; Marzano et al., 2004; Schmoker, 2006; Stronge, 2002; Stronge, 2007; Stronge & Hindman, 2006).

Traditional Salary Schedule

Over twenty-five years ago, Hurley (1985) wrote a publication entitled, *The Single Salary Schedule*, explaining the history, rationale, and advantages of the traditional salary schedule. Through his research, Hurley (1985) found the traditional salary schedule is an excellent compensation tool. This publication is still relevant today and is distributed by the NEA to provide knowledge and understanding of how the present compensation method came to exist.

Hurley (1985) reported earlier in the twentieth century, salaries for teachers were determined on an individual basis. Experience and training were rewarded, but high school teachers generally received a larger remuneration than grade-school teachers (Hess, 2010; Hurley, 1985). In general, males were paid higher salaries than females, while more effective teachers were paid higher salaries than less effective teachers (Hess, 2010; Hurley, 1985). Due to this inequality, there was a major push for the adoption of a traditional salary schedule. The argument for a salary schedule centered on the thought there was no justification for paying different salaries to teachers with equal years of experience and training (Hess, 2010; Hurley, 1985). Advocates for the traditional salary schedule argued successful experience added to the skill and value of a teacher, and this experience justified higher monetary rewards (Hurley, 1985). To move across the salary schedule, teachers were encouraged to receive more training or education. This uniform schedule was fair, transparent, and easy to implement (Ramirez, 2010).

Experience and training became the two criteria of the traditional salary schedule (Hess, 2010; Hurley, 1985; Johnson & Papay, 2009). Even today, the traditional salary schedule is used as it was created. Newly-employed teachers have little or no experience and the least academically trained of teachers are paid the least. Teachers with additional education and more years of experience receive higher compensation. At the time of Hurley's (1985) publication, there was no differentiation in salary by grade level or subject taught in school districts. However, today, teachers in areas considered as high-need may receive additional compensation (Chait, 2007; Milken Family Foundation, 2008).

The first traditional salary schedule for teachers was developed in the Denver, Colorado, school system in 1920 and has been the dominate system of pay since World War II (Heneman & Kimball, 2008; Hurley, 1985; Johnson & Papay, 2009; Wisconsin Center for Education Research, 2008). By 1980, 96% of the school districts in the United States had implemented the traditional salary schedule (Hurley, 1985). Currently, 95% of school districts still utilize the traditional salary schedule (Johnson & Papay, 2009; Wisconsin Center for Education Research, 2008). The traditional salary schedule has proven to be the most viable method for compensating teachers. As school districts across the nation seek ways to achieve the goal of raising teacher salaries, the traditional salary schedule may be in jeopardy.

Opponents of Merit Pay

The merit pay system has much opposition (Gratz, 2009a; Kohn, 2003; NEA, 2002a). The opponents believe there is a better alternative than merit pay systems to reward teachers for student achievement (Johnson & Papay, 2009). Critics feel one alternative of merit pay is to offer extra money to only those people who teach specific courses, such as math and science; however, that is seen as unfair and showing favoritism (Klein, 2009). Amrein-Beardsley (2009) pointed out not all subjects or grade levels are assessed which imposes accountability measures on some teachers while other teachers are exempt from being held accountable. Koretz, who authored the preface of the book, *Teachers, Performance Pay, and Accountability*, stated sarcastically, “Proponents of merit pay argue that if we manage schools as if they were private firms and reward and punish teachers on the basis of how much students learn, teachers will do better and students will learn more” (Adams et al., 2009, p. 1).

Ravitch (2010b), author and former leader in the current education reform movement, expressed a change of heart in her book, *The Death and Life of the Great American School System*. Having argued for reforms, such as charter schools, merit pay, school choice, and accountability, Ravitch (2010b) realized her beliefs had become too conservative and the ideas of reform too radical, “Testing, I realized with dismay, had become a central preoccupation in the schools and was not just a measure but an end in itself” (p. 12). Ravitch (2010b) realized standards were not rising, and schools were actually lowering expectations to meet the unrealistic and unattainable targets set by federal guidelines:

It is time, I think, for those who want to improve our schools to focus on the essentials of education... We must take care that our teachers are well educated, not just well trained. We must be sure that schools have the authority to maintain both standards of learning and standards of behavior. (pp. 13-14)

Other issues impacting education which are uncontrollable or unfair include class size, student assignment, and course load (Amrein-Beardsley, 2009; Ravitch, 2010b). Every teacher should have an equal opportunity for success; however, equality cannot be a reality. Teachers do not have control over class size or the abilities of students within the classroom (Amrein-Beardsley, 2009). Ravitch (2010b) argued children come to school at different levels with diverse backgrounds; thus, each educational experience is different and not always reflective of the educator. Students are not always randomly assigned to teachers as administrators occasionally assign the more difficult students to teachers who have strong classroom management skills (Amrein-Beardsley, 2009).

Parents may also request particular teachers based on the reputation the teacher has in the school community (Amrein-Beardsley, 2009).

During the NEA Representative Assembly in July, 2009, Secretary of Education Duncan advised the 6,500 union members at the convention revisions must be made to seniority rules, tenure laws, and teacher evaluations with student achievement a criteria for compensation teachers (Sawchuk, 2009). Secretary Duncan, a supporter of merit pay, (as cited in Sawchuk, 2009) stated:

When inflexible seniority and rigid tenure rules that we designed put adults ahead of children, then we are not only putting kids at risk, we're putting the entire education system at risk. We're inviting the attack of parents and the public, and that is not good for any of us. (para. 4)

Many NEA members reacted in a negative manner when Duncan spoke on the topics of compensation and evaluation reforms (Sawchuk, 2009).

The NEA has believed there are justifiable reasons to pay bonuses, such as to teachers who have completed national board certification through the National Board of Professional Teaching Standards (NBPTS); to teachers who assume additional responsibilities, such as mentoring; and to teachers serving in hard-to-staff schools (NEA Collective Bargaining and Member Advocacy, 2008b). The NEA has argued merit pay causes distrust among colleagues, a failure to share ideas, and competition among teachers, rather than collaboration (Ritter & Jensen, 2010). The NEA has opposed higher salaries for teachers teaching math and science classes (NEA Department of Collective Bargaining and Member Advocacy, 2008a). The NEA has also opposed the use of test scores in pay and evaluation decisions (NEA Department of Collective Bargaining and

Member Advocacy, 2008a; Sawchuk, 2009). By paying teachers based on test scores, educators are pressured to teach-to-the test, focus only on students who score near the mandated proficiency level, and ignore other students deemed unable to reach proficient or advanced levels on state tests (NEA Department of Collective Bargaining and Member Advocacy, 2008a). Teachers might view students, not as students who want to learn and achieve, but as barriers to monetary rewards (NEA Department of Collective Bargaining and Member Advocacy, 2008a). The MSTA (2010), a 44,000 member group of Missouri educators, has also opposed merit pay including the use of standardized test scores or other subjective criteria to determine future salary increases. This same thought is echoed by Ligon (2008) when speaking of value-added models, “A trend based upon multiple status measures is most likely more accurate than a single measure of the pace of learning at one point in time” (p. 9).

Furthermore, the NEA has expressed opposition to merit pay being tied to performance evaluations of employees (NEA Department of Collective Bargaining and Member Advocacy, 2008a). Since evaluations are highly subjective, connecting monetary rewards to performance evaluations are inappropriate (NEA Department of Collective Bargaining and Member Advocacy, 2008a). Concerns about the trustworthiness of administrators completing evaluations were affirmed in a study by Scholastic and the Gates Foundation (Toppo, 2010). Over three-quarters, or 78%, of the 40,000 teachers interviewed believed principals are, at best, only *somewhat* trustworthy when it comes to rating job performance (Toppo, 2010).

Rothstein (2008) noted:

Supervisory evaluations may be tainted by favoritism, bias, inflation and compression (to avoid penalizing too many employees) and even kickbacks or other forms of corruption. The fact that labor market outcomes seem to be correlated with employees' physical attractiveness confirms that supervisory evaluations are flawed tools for objective evaluation of performance. (p. 67)

Kohn (2003) addressed several reasons why pay-for-performance plans (merit pay) are unsuccessful. Those in control and with power, such as the politicians and administrators, are the ones to set goals, establish criteria, and assess results (Kohn, 2003). The accountability is shifted to the workers who have had little input about the elements of the system (Kohn, 2003). Ligon (2008) agreed the system and rules are changed in education frequently compared to the simple pay-for-performance plans in private industry. In most private industry, the requirements for pay are attributed to achieving a desired goal of sales or meeting a sales quota (Ligon, 2008).

In education, teachers are pitted against one another resulting in lack of collaboration and team work (Kohn, 2003; Pfeffer, 1998). Pfeffer (1998) offered this perspective, "The more I get in my raise, the less is left for my colleagues. So the worse my workmates perform, the happier I am because I know I will look better by comparison" (p. 117). Staff members may point fingers and blame fellow faculty when school-wide bonus programs fail (Kohn, 2003).

There is a belief some workers could perform a better job; however, the workers wait until they are forced to perform at a higher level (Kohn, 2003). Educational deficiencies and the factors causing the deficiency should be the focus of improvement

rather than monetary rewards (Kohn, 2003). Pfeffer (1998) agreed with Kohn; by simply changing the compensation systems, organizations will not solve recruitment or retention problems. The focus should be on redefining jobs, creating workplace culture, and on making work fun and meaningful (Pfeffer, 1998).

Kohn (2003) argued merit pay programs create high stakes cheating, or *gaming*, which encourages teachers to teach-to-the test without improving student learning. Only one of the components in the merit pay system ProComp, in Denver, Colorado, is directly linked to student achievement (Gratz, 2009b). The benefit of such a plan discourages the aforementioned issues and focuses on multiple contributions a teacher makes in the classroom and profession (Gratz, 2009b). Kohn's (2003) final argument in opposition to merit pay was teachers should not be rewarded; moreover, "Teachers should be paid well, freed from misguided mandates, treated with respect, and provided with the support they need to help their students become increasingly proficient and enthusiastic learners" (p. 6). Kohn (2003) suggested this precept: "Pay people well, pay them fairly, and then do everything possible to help them forget about money" (p. 4). Even if a teacher could earn a substantial bonus under an incentive program, pay cannot substitute for a working environment filled with trust and meaningful work (Johnson & Papay, 2009; Pfeffer, 1998).

Proponents of Merit Pay

Motivation is a key component of merit pay, and, according to Gratz (2009a), teachers will try harder when the financial rewards are greater for those who succeed. Herzberg indicated employees must have both hygiene factors (policies, supervisory style, working condition, salary) and motivators (achievement, recognition, growth,

interest) in the work place (Gratz, 2009a). Employees must believe they are treated fairly to minimize dissatisfaction; however, the job needs to provide achievement, recognition, and interest if workers are to be truly motivated (Gratz, 2009). Workers must have the expectation action X will lead to outcome Y resulting in rewards they believe are important (Gratz, 2009a). According to Gratz (2009a), no accepted theories of worker motivation remain where humans are motivated primarily by extrinsic factors.

The traditional salary schedule allows teachers to be paid regardless of job performance. Since salary is determined by experience and additional education, there is no financial incentive for teachers to try harder (Gratz, 2009a). Policy makers have believed equal pay, regardless of the quality of teacher's output, provides a disincentive for performing above and beyond (Gratz, 2009a). A well-designed merit pay program should reward educators who choose to go above and beyond making an investment in their schools or districts (Hess, 2010). Gratz (2009a) believed pay related to productivity would provide an incentive for teachers to perform to the best of their ability. According to Hess (2010), a one-size-fits-all compensation method, or traditional salary schedule, means the best teachers are paid too little, and the least effective teachers are paid too much. Hess (2010) concluded merit pay can help attract and retain quality educators.

Klein (2009) posed, "a simple glance at other professions, like business, medicine, law, and even aviation, explains why some jobs require higher compensation and benefits than others: they're more difficult, more stressful, or in higher demand" (para. 9). Hess (2010) believed by allowing pay to reflect perceived value, law and medicine have made it possible for those accomplished in the fields to earn more compensation without ever having to move into administration or management. With a

merit pay system, effective teachers could be recruited and retained (Hess, 2010). The NEA Department of Collective Bargaining and Member Advocacy (2008a) acknowledged the 2008 Economic Policy Institute report which compared teacher salaries and long-term earning potential to other professions. The results indicated teacher salaries were 15% lower, and many teachers were leaving the profession to earn higher salaries (NEA Department of Collective Bargaining and Member Advocacy, 2008a).

The American Federation of Teachers (AFT) has believed “compensation based on differentiated pay [merit pay] should be made by the local union leaders and district officials who know best what will work in their schools” (AFT, 2010, para. 1). Through negotiations with school officials, the AFT has determined a well-designed compensation system should be voluntary, school-wide, and promote a collaborative work environment (AFT, 2010). The AFT agreed with the NEA on the areas of additional compensation for teachers which should include teachers who earn National Board certification, work in hard-to-staff schools, serve as mentors, and participate in other professional activities (AFT, 2010; NEA Collective Bargaining and Member Advocacy, 2008b).

Younger teachers are more willing to consider merit pay than older teachers, as reported by the Public Agenda of New York City and Learning Point Associates (Johnson & Papay, 2010; Viadero, 2009b). Focusing on Generation Y teachers, 32 years old and younger, the report indicated, “71% of the group would strongly or somewhat favor merit pay for teachers who consistently work harder, putting in more time and effort than other teachers” (Viadero, 2009b, para. 3). Only 63% of teachers, age 33 and above, favored merit pay (Viadero, 2009b). Despite the high percentages of Generation Y teachers favoring merit pay, merit pay was rated last among 12 proposals for improving

teaching by the younger teachers (Viadero, 2009b). Contrary to this, Hewlett (as cited in Pink, 2009) compared the Baby Boomer generation to the Generation Y group and found neither generation rated money as the most important form of compensation. According to Pink (2009), these two groups chose nonmonetary factors to be more important than monetary factors.

Ritter and Jensen (2010) found some school districts rewarded teachers for the overall school's achievement, thus encouraging teachers to collaborate rather than become secretive about their teaching. This practice was evident in Midway Elementary School, in Midway, Utah, where the faculty created a plan, guided by four questions, which allowed for an increase in collaboration and teamwork utilizing professional learning communities (Smith, 2010): "What do we want our student to know? How are we going to know if they know it? What are we going to do when they do, and what are we going to do when they don't?" (para. 3). Rewarding school-wide achievement allows for the school community to be rewarded (Buck, 2010).

According to Ritter and Jensen (2010), teachers might be more willing to try something different if the incentives were substantial and the criteria were clear. This was evident in the Midway School District plan, as 40% of the teacher evaluation was based on student achievement, 40% was based on teacher development, and 20% was based on parent satisfaction (Smith, 2010). Focusing on student growth throughout the year may reduce a teacher's fear of having the lowest performing students in the classroom (Ritter & Jensen, 2010).

Parents are supportive of teachers being compensated based on test scores (Gratz, 2009a; Howell & Henderson, 2010). In a study using results from the 2009 *Education*

Next Program on Education Policy and Governance (PEPG), Howell and Henderson (2010) reported the majority of parents favor teacher compensation based on student performance using standardized test scores. Even though three-fourths of the teachers surveyed opposed merit pay, parents supported various forms of compensation including linking merit pay to tenure (Howell & Henderson, 2010). When parents were asked about increasing teacher salary in their state, 44% believed there was a need to increase salaries, and an additional 10% felt the increase was greatly needed (Howell & Henderson, 2010). Proof parents believe in merit pay for teachers can be noted in the collective design in Denver's ProComp program (Gratz, 2009a; Moulthrop et al., 2005). In 2005, 58% of the voters agreed to fund a \$25 million program to pay teachers based, in part, on student success in the classroom (Gratz, 2009a).

Gratz (2009a) noted the Phi Delta Kappa (PDK) Gallup Polls in 2005 and 2007, indicated support for an increase in teacher compensation. In 2005, over half of the participants agreed test scores should be one of several measures of a teacher's performance (Gratz, 2009a). In 2007, 87% to 95% of the participants supported smaller class size, financial incentives for teacher performance, more professional development, and higher starting salaries for educators (Gratz, 2009a). The president of the Economic Policy Institute, Mishel, stated:

There are a lot of people who talk very simply about merit pay. Let's move beyond a discussion of merit pay, the formulaic type of performance pay, and have a full-bodied discussion of other, more promising ways of changing teacher compensation systems (as cited in Orr, 2009, p. 2).

Unsuccessful Pay Programs

Governor's Educator Excellence Grants in Texas. Through a piloted, performance pay program in Texas, during the 2005-2006 and the 2008-2009 school years, over \$10 million in federal grant money was distributed to schools that achieved high scores on state tests (Stutz, 2009). The program, Governor's Educator Excellence Grants (GEEG), was not as successful as many thought, according to researchers from the National Center on Performance Incentives at Vanderbilt University (Viadero, 2009d). Unfortunately, the GEEG program did not demonstrate any improvement in student test scores (Stutz, 2009; Viadero, 2009d). The third-year findings indicated the program had a "negligible effect on student test-score gains" (Viadero, 2009d, para. 4). The state recommended a \$3,000 minimum bonus; however, the bonuses averaged \$1,982 during the first year and \$2,094 during the second year (Stutz, 2009; Viadero, 2009d). Kouri, the president of the Texas State Teachers' Association, stated, "We're not surprised by the findings. We predicted the program would be a flop, and that's what it turned out to be" (Stutz, 2009, para. 16).

The governor of Texas, a supporter of merit pay, urged the legislature to combine several of the state's performance-incentive programs into a single program (Viadero, 2009d). The District Award for Teacher Excellence (DATE), funded at approximately \$200 million a year, was used for bonuses based on student achievement and stipends for teachers in hard-to-staff schools or in high-need subjects (Stutz, 2009; Viadero, 2009d). Stipends were also paid to teachers who mentored or attended professional development training (Stutz, 2009). Canaday, a member of the Association of Texas Professional Educators, stated, "You can't take a snapshot of students' performance on one day and

extrapolate from that whether their teacher is highly effective over the entire school year” (Stutz, 2009, para. 21).

The findings indicated the design of this particular plan was not successful (Viadero, 2009d). Learning from the mistakes of the first plan, Texas is ready to move forward with DATE if the program is successful (Viadero, 2009d). As other school districts and legislatures design merit pay programs, examining the mistakes of unsuccessful programs might provide insight in pitfalls to avoid allowing for successful plans to be developed.

Project on Incentives in Teaching in Nashville, Tennessee. A three-year study conducted in the Metropolitan Nashville School System, by the National Center on Performance Incentives, concluded there is no effect of incentives on test scores (Springer et al., 2010). Project on Incentives in Teaching, or POINT, was a cooperative effort to determine if test scores would raise if teachers were rewarded based on improved scores (Springer et al., 2010). The three-year study was conducted from 2006-2007 through the 2008-2009 school years.

Middle school mathematics teachers volunteered to participate and were assigned to a control group comprised of those not eligible for bonuses or to a treatment group consisting of those eligible for bonuses (Springer et al., 2010). At the launch of the program, 296 teachers volunteered for the project with only 148 teachers remaining at the end of the three-year study (Springer et al., 2010). The attrition rate was due to teachers leaving the classroom or changing content areas (Springer et al., 2010). To encourage teachers to remain in the program, each teacher was paid \$750 per year for participation (Springer et al., 2010).

Utilizing test scores from the Tennessee Comprehensive Assessment Program (TCAP), bonuses were awarded in increments of \$5,000 up to \$15,000 (Springer et al., 2010). To insure safeguards, bonuses were not tied solely to mathematics scores decreasing competition between teachers who were striving to reach a fixed target indicating student growth in all areas (Springer et al., 2010). Over the course of three years, more than \$1.27 million was expended with 33.6% of the teachers receiving bonuses (Springer et al., 2010). Of the group, 18 teachers were on the list each year, while 17 were rewarded bonuses twice, and 16 teachers were one-time recipients of the bonuses (Springer et al., 2010). The average bonuses per year ranged from \$6,623 to \$11, 370 (Springer et al., 2010).

As the project concluded, no significant difference occurred in student achievement test scores between the treatment teacher group and the control teacher group, and there was no significant difference in any year or grade level in the study (Springer et al., 2010). As a result, POINT intervention did not lead to large, lasting changes in student achievement as based on the TCAD. The findings indicated the idea the bonus amounts were too small to motivate teachers was unlikely (Springer et al., 2010). In contrast, the program purposely attempted to avoid this issue (Springer et al., 2010). However, additional conclusions could be drawn: the incentives were poorly designed, teachers believed they were doing the best job possible or were out of ideas to try, and teachers' attempts to improve performance were not effective (Springer et al., 2010).

Results of unsuccessful programs. Several of the aforementioned programs were unsuccessful or the results were inconclusive. In Texas, an attempt to incorporate a merit

pay program using federal funding was ineffective. Although unsuccessful, there is a push to revise the plan and attempt the process again. In Tennessee, an extensive program was attempted with little success. Even though the program was carefully crafted and included only those educators who chose to participate, this program also did not achieve what many thought it should.

Successful Pay Programs

ASPIRE in Houston, Texas. The Houston Independent School District has one of the largest and most successful bonus programs in the nation (Mellon, 2010). The program, ASPIRE, which began in 2007, has provided over \$113 million in performance pay bonuses with more than \$40 million expended in January, 2010 (Johnson & Papay, 2009; Mellon, 2010). Bonuses were given to teachers whose students made the biggest gains academically and ranged from \$25 to nearly \$25,000 (Mellon, 2010). This resulted in almost 90% of the eligible employees earning a bonus (Mellon, 2010). Bonuses were paid to schools based on their test scores, as well as to individual teachers based on their students' scores (Johnson & Papay, 2009; Mellon, 2010). The school board has used this pay system as a method to attract and retain the best teachers (Mellon, 2010).

Instead of applying for *Race to the Top* money, Texas applied for the newest round of Teacher Incentive Fund (TIF) grants aimed at awarding top educators with bonus pay (Hacker, 2010). Texas was awarded more than \$248 million in federal grant money in September, 2010, with money appropriated to both charter and public schools, to create or expand already existing pay plans in Houston and Fort Worth (Hacker, 2010). Through these grants, teachers are evaluated on student academic gains along with other measures including classroom observations.

ProComp in Denver, Colorado. Another successful merit pay program is in Denver, Colorado. ProComp (2010), approved by voters in 2005, has rewarded teachers for boosting student achievement (Gratz, 2009a; Gratz, 2009b; Moulthrop et al., 2005). Although teacher unions are against merit pay plans as such, once the Denver School District was successful in passing the annual \$25 million tax increase marked for teacher salaries, the union then agreed to support the program and worked with the district as partners to create an acceptable program (Moulthrop et al., 2005; Ramirez, 2010; Ravitch, 2010b). The goals of ProComp (2010) were established to:

- Reward and recognize teachers for meeting and exceeding expectations
- Link compensation more closely with instructional outcomes for students
- Enable the district to attract and retain the most qualified and effective teachers by offering uncapped annual earnings in a fair system. (para. 2)

Created by stakeholders within the district, ProComp contains nine elements within four components teachers can complete to earn bonuses (Gratz, 2009a). The components of ProComp (2010) are:

- **Knowledge and Skills.** Teachers will earn compensation for acquiring and demonstrating knowledge and skills by completing annual professional development units, through earning additional graduate degrees and national certificates and may be reimbursed up to \$1,000 annually, \$4,000 lifetime for tuition and repayment of student loans.
- **Professional Evaluation.** Teachers will be recognized for their classroom skill by receiving salary increases every three years for satisfactory evaluations.

- **Student Growth.** Teachers will be rewarded for the academic growth of their students. They can earn compensation for meeting annual objectives, for exceeding the Colorado Student Assessment Program growth goals and for working in a school judged distinguished based on academic gains and other factors.
- **Market Incentives.** Bonuses can assist the district and schools in meeting specific needs. Teachers in hard to serve schools, those faced with academic challenges, can earn annual bonuses. Bonuses will be available to those filling hard to staff positions, assignments which historically have shortages of qualified applicants. (para. 3-6)

Denver Public School teachers emphasized the success of ProComp was due to the increased district and school focus on student achievement, individual goal setting, and the professional development received in the areas of setting and measuring goals (Gratz, 2009a).

In addition, teachers contributed success to motivation factors other than incentive pay, as they were actively involved and their expertise was acknowledged and utilized (Gratz, 2009a). ProComp does not solely base the extra compensation on student test scores (Ramirez, 2010) and teachers can earn additional funds for working in hard-to-staff schools, teach in high needs areas, and for attending professional development workshops (Moulthrop et al., 2005; Ramirez, 2010; Ravitch, 2010b).

Results of successful pay programs. The Houston and Denver school districts have successfully created a merit pay plan which is working and appears to show

promise. These two programs provided bonuses to both individuals and schools for demonstrating student improvement. Both opponents and proponents of merit pay will continue to follow ASPIRE and ProComp to determine the effectiveness of the program over time.

Legislation

Merit pay systems are increasing in discussions among politicians and becoming items of legislation (Anderson, 2009; Associated Press, 2010a; Associated Press, 2010b; Breitenstein, 2010; Brown, 2010; Cassidy, 2010; Downey, 2010a; Heavin, 2009; Jones, 2010; Kaczor, 2010a; Kaczor, 2010b; Salinero, 2010; Viadero, 2009a). Some districts are moving toward implementing merit pay, with the promise of federal funding and stimulus money, by revamping evaluation and pay systems. President Obama created a new incentive program, *Race to the Top*, which provides money to states which amend education laws and policies (Associated Press, 2010a). The funds were included in the \$787 billion economic stimulus program, provided in 2009, by the federal government (Associated Press, 2010a). In the 2010 federal budget, President Obama requested \$517 million for merit pay programs tied to standardized test scores (Viadero, 2009a).

Prior to his election as President, Obama held a different view of merit pay (Obama, 2006). In April 2008, Matthews and Sizemore (2008), hosts of *Hardball*, interviewed Senator Obama. When asked about merit pay, Obama stated:

I'm not in favor of merit pay as it is currently understood...which basically involves taking test scores and then rewarding people on how they score on tests, how students score on tests...I do believe in creating career ladders for teachers, so that, if they become a master teacher, if they become nationally board certified,

if they have done other things to improve their own professional development, that they can potentially get more pay. I think that's important. (Matthews & Sizemore, 2008, para. 19)

The president of the 3.2 million-member NEA, Van Roekel, stated, "President Obama always says he will do it [create a merit pay program] with educators, not to them" (Quaid, 2009, para. 9). Van Roekel continued, "That is a wonderful feeling, for the president of the United States to acknowledge and respect the professional knowledge and skills that those educators bring to every job in the school" (Quaid, 2009, para. 10). Van Roekel interpreted Obama's response to mean bonuses would not be tied to student test scores and those teachers who were board-certified or who worked in high-poverty, hard-to-staff schools would be paid more (Quaid, 2009). However, administration officials corrected the misconception by Van Roekel; performance pay did include higher pay based on student achievement (Quaid, 2009).

Georgia Senator, Balfour, Chairman of the Senate Rules Committee, introduced SB 386 legislation to provide an increase in pay for high-performing teachers and principals (Downey, 2010b). Balfour stated, "This legislation rewards our All-Star teachers through higher pay. These teachers go all the way for our students and should be rewarded appropriately" (Downey, 2010b, para. 4). Effective teachers would earn higher salaries based on classroom observations and student growth as a result of SB 386 legislation (Downey, 2010b). Georgia Governor, Perdue, agreed merit pay is the way to reward teachers:

Boosting pay for Georgia's top teachers is an idea whose time has come. Focusing on student improvement with other measures like peer evaluations aligns state

funding with our policy priority: improving the education of our students. The new pay model will help the state attract, reward, encourage and retain top teachers. (Downey, 2010b, para. 2)

Currently, Georgia teachers are paid using the traditional salary schedule which is based on years of experience and additional education earned (Downey, 2010a). Perdue continued:

Our current system only incentivizes the degree, not the degree to which students learn. We must encourage our best and brightest to enter the teaching profession and must reward effective teachers in order to retain them in Georgia classrooms. Student achievement must be our driving force, and our compensation model must reflect that focus. (Downey, 2010a, para. 5)

The legislation requires the adoption of a statewide evaluation tool focusing on student achievement and peer observation, by July, 2011 (Downey, 2010a). Several districts have announced they are implementing new teacher evaluation standards as a result of this legislation and to be aligned with the goals of *Race to the Top* (Darenberg, 2010).

In Georgia's Gwinnett County Public Schools, a new evaluation is being implemented but is not changing the way teachers are paid. Davis, Chief Human Resource Officer with the district, commented, "You have to have a solid evaluation that people believe is fair before you attach any type of merit to it relative to performance pay" (Darenberg, 2010, p. 1). Teachers in Georgia are given the option to participate in the enhanced pay model (Jones, 2010). Hubbard, President of the Georgia Educators' Association, stated, "If they [the administration] are going to base it just on a

standardized test score, that is going to be a problem with us because a child is more than a standardized-test score” (Jones, 2010, para. 9).

Perhaps the most widely publicized legislative bill, in 2010, was Senate Bill 6, in Florida. Senator Thrasher, the head of the Republican Party of Florida, sponsored a merit pay bill basing teacher salaries on student gains on the state test (Breitenstein, 2010; Postal, 2010). Teachers who were ineffective would be fired, and those teachers with student gains would earn additional pay (Kaczor, 2010a). The legislative bill had been called a *hammer* by the sponsor and a *nuclear weapon* by the teachers’ union (Kaczor, 2010a). Ford, President of the Florida Education Association, stated the plan “lashes out at the teachers who have made Florida schools a model for the nation” (Postal, 2010, para. 6). Lentz, a high school English teacher, argued, “To judge students on a single test they take a single time a year is unfair. To judge a teacher by that single test is also unfair” (Salinero, 2010, para. 13). Senator Thrasher affirmed, “It’s a bill that finally for the first time will reward teachers who actually demonstrate that they are achieving student achievement in their classrooms” (Postal, 2010, para. 13).

According to the language in Senate Bill 6, any Florida school district against this legislation would have state funding cut (Breitenstein, 2010). A school district could lose up to 5% of the total budget set aside for salaries (Breitenstein, 2010). Many districts have made reductions in school spending, laid off teachers and staff members, and eliminated programs (Solochek & Matus, 2010). Additional cuts would have been devastating to school districts which have already made drastic cuts to programs and staff.

As Senate Bill 6 advanced through both the House and Senate in Florida, Governor Crist relinquished his earlier support, arguing he has “never had an issue put as much political pressure on him since taking office” (Kaczor, 2010b, para. 1). Once Crist vetoed Senate Bill 6, on April 15th, 2010, Senator Thrasher expressed, “It goes without saying that I am disappointed” (as cited in Cassidy, 2010, para. 3). Many people did not agree with the governor’s decision to veto, others stated Crist made a courageous move and stood with teachers, parents, and students (Cassidy, 2010). While this bill failed to pass, the battle is not yet over in Florida (Matus & Solochek, 2010). This issue will continue during the next election year and into the 2010-2011 legislative session (Matus & Solochek, 2010).

As a new legislative session began in 2011, Indiana legislators were set to make sweeping educational changes (Thomas, 2010). According to the Indiana Education Roundtable, “A reform package will be introduced focusing on three areas: identify and reward great teachers and principals, empower schools leaders and bring success to failing schools, and offer educational opportunities to all children and give parents a voice” (as cited in Thomas, 2010, para. 11). Improving the teacher evaluation process and rewarding teachers based on performance are key reforms mentioned in this package (Thomas, 2010). Indiana Governor, Daniels, stated, “Every word we’ve said about how complicated this is, is true, but the day has come that we have to act” (as cited in Thomas, 2010, para.1).

Alternatives to Merit Pay

There is support for alternative methods of compensation for education personal (AFT, 2010; Johnson & Papay, 2009; NEA Department of Collective Bargaining and

Member Advocacy, 2008a; Rothstein, 2001). The focus of alternative compensation plans are based on paying teachers for work or activities completed in school settings (AFT, 2010; Johnson & Papay, 2009; NEA Department of Collective Bargaining and Member Advocacy, 2008a; Rothstein, 2001). Ideas vary on the methods to which these pay plans should be created and evaluated.

Minimum starting salary and added responsibilities. Although the NEA does not support merit pay, other options are acceptable and even recommended (NEA Department of Collective Bargaining and Member Advocacy, 2008a). The NEA has supported a minimum starting salary of \$40,000 for teachers and professional development focusing on best practices and student learning (NEA Department of Collective Bargaining and Member Advocacy, 2008a). Pink (2010) agreed base pay for teachers needed to increase. Pink (2010) advocated:

Too many talented people opt out of this career because they're concerned about supporting their families. For prospective teachers, raising base salaries would remove an obstacle to entering the profession. For existing teachers, it's a way to recognize the importance of their jobs. (para. 10)

Both the NEA and the AFT agreed additional ways to compensate teachers should include paying teachers to serve as mentors to new teachers, work longer hours, assume additional responsibilities, or take positions in hard-to-staff buildings (AFT, 2010; NEA Department of Collective Bargaining and Member Advocacy, 2008b).

A national study, sponsored by Scholastic and the Gates Foundation, found higher salaries are more likely to retain highly-qualified teachers in the classroom than merit pay (Anderson, 2010). Forty-five percent of those surveyed responded higher salaries were

needed to retain good teachers. Only 8% felt performance pay was needed to retain good teachers (Anderson, 2010).

National board certification. Beyond a minimum starting salary, the NEA has believed in offering incentives for accomplishments affecting teacher quality and student learning (NEA Department of Collective Bargaining and Member Advocacy, 2008a).

National Board Certification is a voluntary program designed to recognize effective and accomplished teachers (National Board for Professional Teaching Standards [NBPTS], 2010). Candidates seeking certification must complete four portfolio entries focusing on the teaching practice and six constructed response questions to assess content knowledge (NBPTS, 2010). Based on national standards, National Board Certification (NBPTS, 2010) has five core propositions forming the foundation for accomplished teachers:

1. Teachers are committed to students and their learning.
2. Teachers know the subjects they teach and how to teach those subjects to students.
3. Teachers are responsible for managing and monitoring student learning.
4. Teachers think systematically about their practice and learn from experience.
5. Teachers are members of learning communities. (para. 3-7)

Incentive pay varies from state to state and district to district. According to the NBPTS (2010), some states pay \$10,000 per year for the life of the certificate (which is ten years), while other states pay nothing. In Missouri, incentive pay ranges from 10% of the base pay up to \$5,000 (NBPTS, 2010).

Quality of teaching. Another method for rewarding teachers is to assess each teacher on skills other than student test scores. Beginning in 2003, Cincinnati teachers

were judged on 16 distinct skill standards, and pay was based on quality of teaching (Rothstein, 2001). Criteria were set for teacher evaluations with the help of Charlotte Danielson of the Educational Testing Service (ETS) and University of Wisconsin professor, Allan Odden. The criteria included lesson plans, student work, parent communication, additional education, and participation on committees (Rothstein, 2001). Points were awarded based on the criteria developed and observed through classroom walk throughs. Each teacher received a score which determined if raises were awarded (Rothstein, 2001).

Tiered programs. Johnson and Papay (2009) proposed a system similar to the Career Ladder programs of the 1980s and the Teacher Advancement Program (TAP). The system they proposed has four tiers to classify teachers' pay based on expertise, effectiveness, and the roles they assume outside the classroom (Johnson & Papay, 2009). Teachers advance through the tiers over the course of their career:

1. Beginning teachers make up the first tier and remain until achieving tenure or being released from their contract.
2. The second tier consists of tenured teachers. Teachers could remain on this tier for the rest of their careers.
3. The third tier consists of master teachers or teacher leaders. These teachers have demonstrated success with students, understanding of the pedagogy, and shown a commitment to colleagues' learning. Additional responsibilities these individuals might assume include opening their classroom doors to less-skilled teachers for observation, or serve as models and advisors to other staff. These teachers could also take on other kinds of leadership roles.

4. The fourth tier would be comprised of highly effective teachers. To reach this tier, teachers have to demonstrate high levels of effectiveness. Teachers on this tier could work with new teachers, implement new curriculum, or coach other teachers. (Johnson & Papay, 2009, pp. 55-56)

In addition to the four-tier system, schools could receive bonuses for school growth in student achievement, addressing staffing shortages, or for teachers agreeing to teach in struggling schools (Johnson & Papay, 2009). Even with this plan, Johnson and Papay (2009) agreed local school districts would have to create a tier system based on the districts' desired outcomes.

Value-added models. Value-added models are based on a statistical method which students' prior test scores, for one or more years, are examined to try and isolate the effects of a teacher, school, or program on student learning (Amrein-Beardsley, 2009; NEA Department of Collective Bargaining and Member Advocacy, 2008a). Using past scores, projections of a student's future performance can be determined. The estimated value of a teacher or school is determined from the student's actual scores and the student's projected scores (Los Angeles Teacher Ratings, 2010).

Proponents of the value-added model, insist it is the teacher's input which makes a difference not any external factors in a student's life (Amrein-Beardsley, 2009; Ravitch, 2010a). Ravitch (2010a) disagreed:

Some poor kids do very well in school and some rich kids fail, but the odds favor the rich kids because of the advantages of their homes. They start ahead because of their parents' ability to take them to the library and museums, to give them

good medical care and nutrition, to travel and to endow them with a large vocabulary before the first day of school. (para. 5)

Ligon (2008) agreed value-added models give another perspective on student learning and teacher effectiveness. Ligon acknowledged many factors are out of the control of students, teachers, and schools. These factors include previous teachers and schools, as well as family income, race, ethnicity, and parent education (Amrein-Beardsley, 2009; Ligon, 2008). Hess (2010) concurred value-added calculations are not a comprehensive or reliable measure of teacher quality. Many states do not have the longitudinal test data needed for a value-added program, such as the Education Value-Added Assessment System (EVASS) created by Sanders (Amrein-Beardsley, 2009). Amrein-Beardsley (2009) identified possible errors in data collection resulting in the production of inaccurate results: data entered incorrectly, students missed test, data not linked to a particular teacher or student, or student mobility.

Even though there is evidence value-added models are effective in measuring student achievement in some cases, it is not appropriate as a pay-for-performance program (Ligon, 2008). Ligon (2008) stated, “Using value-added models for pay-for-performance will continue to happen, simply because the face validity of acknowledging teachers and schools who overcome the odds to help students is compelling” (p. 12). In order for pay-for-performance to work best, Ligon (2008) suggested, “if it’s done strictly by the numbers, simple numbers, unadjusted numbers, numbers everyone counts the same way; or subjective numbers awarded by an informed or invested overseer, then it can work” (p. 13).

In Los Angeles, California, the effectiveness of teachers was determined using a value-added model (Los Angeles Teacher Ratings, 2010). Despite having data for many years, the district had not provided this information to any parents or teachers (Los Angeles Teacher Ratings, 2010). In 2010, the editors of the *LA Times* decided the scores of teachers, derived from using a value-added model, needed to be released “because it bears on the performance of public employees who provide an important service, and in the belief that parents and the public have a right to judge it for themselves” (Los Angeles Teacher Ratings, 2010, para. 3). The scores released corresponded to elementary teachers who taught third through fifth grade with at least 60 students during the 2002-2003 and 2008-2009 school years (Los Angeles Teacher Ratings, 2010). The teachers and schools were ranked on a percentile scale and placed into five equal categories ranging from least effective to most effective (Los Angeles Teacher Ratings, 2010).

Value-added scores are estimated and not precise measures with smaller potential for error at the high and low end of the scales (Los Angeles Teacher Ratings, 2010). Students with difficulties, including those students who are low-achieving or English-language learners, do not affect the scores because controls are in place for such differences which allowed all teachers and schools to be on the same level (Los Angeles Teacher Ratings, 2010). As a result of the article in 2010, 6,000 individual teacher’s names were released to the public disclosing how effective they were (Van Roekel, Sanchez, & Duffy, 2010).

In a letter to the editors of the *LA Times*, Van Roekel, President of the NEA; Sanchez, President of the California Teachers Association; and Duffy, President of the

United Teachers of Los Angeles wrote:

In a reckless and destructive move, which ignores the prevailing consensus that value-added measures are too unreliable and unstable to draw valid conclusions about a teacher's ability to teach to a standardized test, much less to teach students, the *LA Times* has decided to publish a database naming 6,000 teachers and purporting to rate their effectiveness. Reasonable people understand a single test score does not define student learning and can never solely measure the effectiveness of a teacher....Otherwise, we'd have to believe that you felt it was ethical to publicly label teachers as "effective" or "ineffective" based on data, and a methodology, that even your own paper admits are "controversial" and knows are an incomplete and inaccurate measure of the quality of a teacher. (para. 1)

Many teachers were horrified to find their names in print, and damage to both their reputation and their students' reputations occurred. As a result of being labeled least effective, Rigoberto Ruelas, a teacher with 14 years of experience and highly respected in the education community, committed suicide (Los Angeles Teacher Ratings 2010; Van Roekel, personal communication, September 27, 2010). The Ruelas family expressed Rigoberto was depressed by the public humiliation he experienced as a result of the publication of his rating (Ravitch, 2010a).

As a consequence of the *LA Times* releasing the data, prospects for legal action will mostly likely ensue from individual teachers named in the article. The possible action could include libel, common law invasion of privacy, and constitutional right to privacy. Other suits are likely to follow from other teachers listed in the data base published online.

New York City School Chancellor, Klein, had attempted to make public the names of 12,000 public school teachers and their test results following the lead of the *LA Times* and its release of teachers names with ratings of effectiveness (Gonzalez, 2010). The teacher union sued and Klein waited in releasing the scores until after a November 2010, hearing in Manhattan Supreme Court (Gonzalez, 2010). However, the litigation may not continue as Klein resigned from his position on November 9, 2010, after eight years as Chancellor (Nazaryan, 2010).

Gordon, Kane, and Staiger (2006) found teachers did not need degrees, licenses, or certification to teach as these were not good predictors of quality teaching. To determine success, value-added measurement of student performance would identify those strong teachers. Gordon, a member of the Center for American Progress, a think tank, was one to recommend value-added measurements and merit pay to President Obama; ultimately he became the deputy director for education in the Office of Management and Budget and these ideas became part of Obama's education agenda (Ravitch, 2010b). However, these ideas were in opposition to the recommendations his chief campaign adviser, Linda Darling-Hammond, suggested (Ravitch, 2010b).

Multiple measures. Many of the opponents to merit pay believe linking compensation to one test score is inappropriate. The National Council of Measurement in Education (as cited in Brookhart, 2010) stated, "Persons who interrupt, use and communicate assessment results have a professional responsibility to use multiple sources and types of relevant information about persons or programs whenever possible in making educational decisions" (p. 8). This was echoed by Education Secretary, Duncan (as cited in Gratz, 2009b), as he addressed the 2009 NEA convention, "test

scores alone should never drive evaluation, compensation, or tenure decisions” (p. 76).

Multiple measures are defined as using different methods to monitor student progress and achievement (Brookhart, 2010). Using multiple measures allows for construct validity and decision validity (Brookhart, 2010). Construct validity is the attribute one is trying to measure (such as achievement) while decision validity is the multiple avenues to examine as related to why a student is performing a certain way (Brookhart, 2010). By using both methods, a more accurate picture of the student’s ability and achievement can be created (Brookhart, 2010).

According to Gratz (2009b), many assume standardized test scores accurately measure student achievement; however, corporate leaders in major companies have identified key skills indicating success in the workplace: critical thinking skills, problem solving, and teamwork. Yet, these traits or skills cannot be measured on a standardized test; schools must include these skills and others, such as the creative arts, to build well-rounded students (Gratz, 2009b). Gratz (2009b) commented, “A system that rewards schools, students, and teachers only for test scores will get mostly test scores” (p. 79).

Accomplished teaching pathways. Accomplished teaching pathways, or A-PATH, is a compensation program which departs from the traditional salary schedule and seeks an alternative focused on improving student achievement while rewarding the educator (Educator Compensation Institute, 2007). The A-PATH has four main objectives:

1. To attract highly-talented people into the profession of teaching.
2. To retain that talent.
3. To improve teaching skills and knowledge.

4. To add to the collective body of knowledge about effective teaching practices.

(Educator Compensation Institute, 2007, p. 1)

A-PATH resembles a tiered program. A teacher can progress through levels as requirements are met. Residency, step one, is designed for first-year teachers who are assigned to part-time teaching positions and given opportunities to observe master teachers, reflect, and model lessons (Educator Compensation Institute, 2007). Salary at this stage starts at \$35,000 (Educator Compensation Institute, 2007). Upon completion of step one, teachers can move to step two, Initial Educator (Educator Compensation Institute, 2007). Teachers may remain at this step up to four years by completing a portfolio consisting of evidence of professional growth in the area of teaching standards, creating a professional development plan, demonstrating collaboration with colleagues, and developing an assessment plan to improve student learning (Educator Compensation Institute, 2007). The salary increases to \$50,000 at this step (Educator Compensation Institute, 2007). Teachers can remain for the duration of their career at step three, Professional Educator (at a salary of \$60,000-65,000) (Educator Compensation Institute, 2007). In the final stage, Master Educator, teachers are required to obtain National Board Certification and as a result earn between \$75,000-80,000 (Educator Compensation Institute, 2007).

Like Career Ladder programs, A-PATH encourages professional development in district sponsored workshops, university course work, evidence of collaboration with colleagues, or action research. Each of these activities allows participants to earn additional compensation. Completing other tasks, such as serving as teacher leaders or working in hard-to-serve schools, can lead to supplementary pay.

Summary

The growing body of research has shown teacher quality influences student achievement (Danielson, 2009; Goe, Bell, & Little, 2008; Marzano, 2007; Marzano et al., 2004; Rothstein, 2009; Schmoker, 2006; Stronge, 2002; Stronge, 2007; Stronge & Hindman, 2006). The traditional salary schedule has been the predominate method of paying teachers for many years (Hurley, 1985). As changes have occurred in the economic situation of districts, there are reasons to doubt the efficacy and effectiveness of the traditional salary schedule. The pay in public schools verses the private sector is an indicator teachers will gravitate toward positions which pay more. Half of all new teachers leave the profession in the first five years due to working conditions or salary (Gratz, 2009a; Lambert, 2006; Moulthrop et al., 2005). Yet, views differ on how to pay teachers (Gratz, 2009a; Johnson & Papay, 2009; NEA Department of Collective Bargaining and Member Advocacy, 2008a). Many feel merit pay systems adversely affect professional collegiality and collaboration. Additionally, merit pay systems are not conducive to promoting the exchange of best practice strategies which increase student learning and professional growth.

Merit pay programs have been successful and unsuccessful (Mellon, 2010; ProComp, 2010; Stutz, 2009; Viadero, 2009d). Numerous states are considering merit pay as a method to compensate teachers, and legislators are assisting states by sponsoring and passing legislation. President Obama has supported merit pay and has implemented merit pay into the *Race to the Top* incentive program (Obama, 2009). Alternatives to compensate education employees include Career Ladder programs, tiered systems, and raising the starting salary for education personnel (Johnson & Papay, 2009; NEA

Department of Collective Bargaining and Member Advocacy, 2008a). As the issue of salary continues to be examined, the bottom line remains; education systems must attract and retain highly-qualified teachers and provide fair, equitable wages.

In Chapter Three, the methodology of this study was presented and a detailed description of the design and participants was offered. The instrumentation used for this study included surveys and interviews which were detailed as well. The analysis of data and findings in Chapters Four and Chapter Five were comprised of demographic information of participants and the responses from the interviews and surveys. Graphs and charts were included to illustrate the results of each survey question. Narrative excerpts gleaned from the interviews and open-ended questions from the surveys were intertwined throughout the analysis. Chapter Five concluded the study with implications and recommendations.

Chapter Three: Methodology

Merit pay has become a topic of discussion as educational issues are considered by stakeholders. Over 96% of school districts across the nation utilize a traditional salary schedule, rewarding educators with years of experience and educational attainment; however, there are reasons the system is outdated and inefficient (Gratz, 2009a; Hurley, 1985; MODESE, 2010). Educators, legislators, government officials, community members, and others have conflicting views of merit pay and its effectiveness. Researchers, as well as education organizations, maintain there are alternatives to merit pay which would be fair and equitable (Gratz, 2009a; Johnson & Papay, 2009; NEA, 2009b).

In Chapter Three, the methodology of this study was discussed. This mixed-methods design included both qualitative and quantitative data. The population and sample for this study were identified, and explanation on the creation of the instrumentation used to collect data was given. Survey questions were utilized to gather data from 219 educators from across Missouri. Accounts of how the surveys were developed, field-tested, and refined were included. The process of creating the interview questions was defined, as well as how the questions were field-tested and revised for clarity. Interviews were then conducted with 10 state education leaders. Then, the data from surveys and interviews were examined to determine the perceptions of educators and education leaders about merit pay. A *t*-test was applied to compare the perceptions of tenured teachers regarding merit pay to the perceptions of non-tenured teachers regarding merit pay.

The participants in this study included certified public school teachers, superintendents, assistant superintendents, principals, assistant principals, and directors. The perceptions of state-level educational leaders and professional organization leaders were also examined in regard to merit pay. This group included educational leaders from the professional organizations in Missouri (MAFT, MSTA, and MNEA), state board members, and legislators. Originally, the commissioner of education for Missouri was slated for an interview; however, the commissioner was unavailable. The secondary purpose of this study was to examine the perceptions of educators on the impact of merit pay on recruiting and retaining highly-qualified teachers.

Research Questions

The following questions were designed to obtain the perceptions of merit pay from educators, state education leaders, and legislators:

1. What are the perceptions of teachers toward merit pay?
2. What are the perceptions of school administrators toward merit pay for teachers?
3. What are the perceptions of state education leaders toward merit pay for teachers?
4. What are the perceptions of professional organization presidents and legislative directors towards merit pay for teachers?
5. What are the perceptions of educators on the impact of merit pay on recruiting future educators?
6. What are the perceptions of educators on the impact of merit pay on retaining highly-qualified teachers?

Population and Sample

The population of this study was comprised of educators and educational leaders in Missouri. The sample included 214 public school educators, five public school administrators, five professional organization leaders, two state board members, and three legislators. The sample included educators attending educational conferences or meetings in Missouri during the fall of 2010, the presidents of three statewide educational groups (MAFT, MNEA, and MSTA), two of the professional organization legislative directors, two state board members, and three legislators with experience in education or in presenting legislation on merit pay. In order to examine the perceptions of an equal group of tenured and non-tenured teachers, a random number generator was used to select 25 teachers in each group. The utilization of a *t*-test offset the larger number of tenured teachers who completed the surveys.

Instrumentation

Surveys. The purpose of the survey was to gather data to examine the perceptions of teachers and administrators toward the merit pay system and the impact on recruiting and retaining highly-qualified teachers. Surveys were distributed at state education conferences (see Appendix A). Due to the low return rate, surveys were later distributed to local schools hosting professional development activities.

Utilizing prior knowledge and research regarding criteria on how to create surveys, the survey was developed to gather educators' opinions using a Likert scale and open-ended questions. According to the National Business Research Institute (n.d.), a typical survey should be 20-125 questions in length and contain both open-ended questions as well as rating type questions. The first part of a survey should have questions

posed to gather demographic information (National Business Research Institute, n.d.; Tingley, 2004). The next section of a survey should contain questions or statements in which respondents rate their agreement using a 5-point scale. Using a 5-point scale allows for two positive, two negative, and one neutral response. Through the use of open-ended questions, usually the last section of a survey, participants are given the opportunity to express their thoughts on specific topics as well as provide information which might have been overlooked in other questions (National Business Research Institute, n.d.; Tingley, 2004).

Upon the completion of an overview of the topic of merit pay, survey questions were created. According to Driscoll and Brizee (2010), questions need to be clear and unbiased. After the survey was created, it was field-tested by 20 teachers selected at random in southwest Missouri. These educators were affiliated with two of the three professional organizations, the MSTA and the MNEA, or were not members of any educational organization. These teachers mainly represented elementary and middle school grade levels and were all female. Upon collection of the surveys and analysis of the comments and statements, survey questions were revised for clarity and understanding. In addition, the dissertation committee also suggested changes to refine the questions.

The final revision of the survey consisted of 25 questions. The first seven questions elicited responses of demographic information on each participant. The next grouping of questions was answered by reading a statement and providing a response using a Likert Scale: strongly agree, agree, neutral, disagree, and strongly disagree. A sixth choice, not applicable, was available on a limited number of questions due to the

nature of the question. The third grouping of questions allowed participants to circle answers and write personal responses. The remaining questions allowed participants the opportunity to provide written responses regarding their perceptions of merit pay.

Each survey was accompanied by a Letter of Participation explaining the purpose of the study and a brief introduction of the researcher (see Appendix C). In addition, an Informed Consent form (see Appendix D) was attached to the survey packet. The survey packets were distributed across the state at education conferences or meetings. Educators were handed a survey packet as they entered the meeting hall or a survey was placed at their seats. Surveys were collected at the end of each conference or meeting in collection boxes provided by the researcher. A total of 996 surveys were distributed. The rate of return was 22%, or 219 surveys. To ensure confidentiality and anonymity, the surveys did not contain any identifying information. A data coding system was used to further assure anonymity and encouraged each participant to respond honestly and openly about merit pay.

Interviews. The purpose of the interviews was to gather data to examine the perceptions of state-level educational leaders toward the merit pay system and the impact on recruiting and retaining highly-qualified teachers. This group consisted of 10 individuals: presidents of three professional organization and the legislative directors from two of the professional organizations in the state, two state board members, and three legislators. The legislators selected for this study had prior experience in education or had introduced legislation regarding merit pay.

The interview questions were developed in a semi-structured format to gather information on how each individual perceived merit pay. According to Gay and Airasian

(2000), a semi-structured interview allows for open-ended questions to be presented in a certain order while the interviewer records the essence of each response. The interview questions were based on questions in the survey for the educators. Thus, the alignment of the two instruments permitted the research to be cohesive and the data collected to be comparable.

The first draft of the interview consisted of 10 questions. Upon review by the dissertation committee, the interview questions were refined and amended for clarity. The final interview consisted of 12 open-ended questions to gather perceptions and opinions of education leaders across the state.

The interview questions were sent electronically with a Letter of Participation explaining the purpose of the study and a brief introduction to each participant (see Appendix E). In addition, an Informed Consent form (see Appendix F) was attached in each electronic mail to request contact information, a date, time, and preferred location for an interview. Four of the participants chose to have phone interviews, while six chose to be interviewed via electronic mail. Those participants who requested interviews via electronic mail were sent a revised Informed Consent form (see Appendix G) reflecting agreement to participate via electronic mail rather than face-to-face interviews.

Participants were assured anonymity allowing the ability to speak freely, honestly, and openly about merit pay. Each interviewee was assigned a pseudonym selected from a list of the most common surnames in the United States to refer to in the analysis of data to maintain confidentiality.

Limitations of the Findings

Several limitations were identified in this study. A field-test was completed prior to distribution of the surveys which allowed for some questions to be revised and additional questions added. A review by the dissertation committee composed of professional educators, provided advice to refine and clarify interview questions.

Many surveys distributed were not returned, and only a fraction of Missouri educators participated in this study. Due to a poor return rate, surveys were disseminated again to gather more input. Upon completion of the data collection, a total of 219 surveys were collected out of 996 circulated. Surveys were distributed at education conferences hosted by the MNEA and the MSTA, thus members of these associations in attendance received the surveys to complete. Teacher members not in attendance did not have the opportunity to provide thoughts or perceptions. In addition, the MAFT did not hold a fall conference; therefore, teachers within the organization did not provide any perceptions of merit pay. A few additional teachers received surveys through in-service meetings in buildings selected for a second distribution of surveys to gather additional perceptions of educators. Some of the surveys were returned with unanswered questions resulting in incomplete surveys.

The majority of the teachers completing the surveys were tenured. To overcome bias, a random sample of tenured and non-tenured teachers was selected. A *t*-test was conducted with 25 survey results from each group to determine if there was a difference in opinions and perceptions regarding merit pay.

School administrators were surveyed to provide data for research question two: What are the perceptions of school administrators toward merit pay for teachers?

Unfortunately, only four of the 219 participants surveyed were in administrative positions; therefore, findings regarding perceptions of school administrators were limited.

Data Collection

Surveys. A mixed-methods design was utilized to conduct this study. The quantitative data were collected from a written survey consisting of 25 questions. The educators surveyed were attending the fall conferences of two state professional organizations: MNEA and MSTA. At the MNEA conference held in Kansas City, 381 surveys were distributed with a return rate of 160, or 42%. At the MSTA conference, also held in Kansas City, 500 surveys were distributed with a return rate of 22, or 0.04%. Surveys were distributed a second time to school personnel as a result of the low return from the two conferences. Attempts were made to contact administrative colleagues to determine when teachers would be attending in-service or organizational meetings. Administrators at one elementary school and one middle school had meetings scheduled and were willing to allow surveys to be distributed. The second round resulted in 110 surveys being distributed with a return rate of 37, or 32%. Overall, 219 surveys were returned with a final return rate of 22%.

An Excel spreadsheet was utilized to record participants' responses to the survey questions. Quantitative data are data in a numerical form or in statistics (WriteWork, 1995). Questionnaires and structured interviews are typical methods used when gaining quantitative data as the results are easily transferable to a numerical form which is best recorded in spreadsheets (WriteWork, 1995). The spreadsheet was customized to allow for multiple columns and rows to record the data collected. The columns were labeled to match each corresponding question and responses from the survey. Each row was

numbered to correspond with a survey matching the same number and the responses were entered under the appropriate columns. Upon completing the data entry process, the results were summed. This process allowed for a quick tally of each participant's response to each question.

Additionally, to compare perceptions of tenured teachers and non-tenured teachers, a random sample of completed surveys was selected and a *t*-test was conducted. According to Gay and Airasian (2000), the best way to obtain a representative sample is to use a simple random sampling. This method allows all individuals in the defined category to have an equal and independent chance of being selected (Gay & Airasian, 2000). Each teacher was identified with a corresponding number written on his or her survey upon completion of the data entry process. Utilizing a random number generator, a sample was selected consisting of 25 tenured teachers and 25 non-tenured teachers. Twenty-five members of each group were selected to offset the larger number of tenured teachers who completed the surveys.

Interviews. Qualitative data were collected from interviews with the following: two Missouri state board of education members, the president of each of the three professional organizations in Missouri, two legislative directors from two professional organizations in Missouri, and three current legislators. The participants were selected for their expertise and experience as education leaders in their organizations or professions. The interview consisted of 12 open-ended questions allowing the participants to respond freely about their perceptions and opinions of merit pay.

Data Analysis

The interviews and surveys provided perceptions and opinions of those in the field of education regarding the value of merit pay. In addition, the perceptions were analyzed to determine the impact of merit pay on recruiting and retaining highly-qualified teachers. The data represented both educators in the field as well as education leaders from across the state.

Quantitative data. Quantitative data were obtained through the survey responses. In order to understand quantitative data analysis, the following subheadings emerged: descriptive statistics, inferential statistics, internal reliability, and validity. Descriptive statistics examined how the responses were tabulated and illustrated. The inferential statistics identified the purpose and definition of the *t*-test. Internal reliability was achieved through conducting a field-test.

Descriptive statistics. Once the responses were recorded on the spreadsheet, the results were summed. Utilizing the capabilities of Excel, graphs, tables, and charts were created to depict the demographic. The data were explained in visual as well as written form.

Inferential statistics. A *t*-test was used to determine the perceptions of a selected group of educators to conclude if there is a significant difference in perceptions of merit pay between groups of educators. A *t*-test is defined as “a parametric test of significance used to determine whether there is a significant difference between two independent samples” (Gay & Airasian, 2000, p. 629). The *t*-test “makes adjustments for the fact that the distribution of scores for small samples becomes increasingly different from a normal

distribution as sample sizes become increasingly smaller” (Gay & Airasian, 2000, pp. 483-484). The significance level was $p = < .05$.

Internal reliability. Merit pay was selected as the topic of the paper due to the interest of the researcher. Upon selecting the topic, the research questions were designed. Based on the purpose of the study, which was to determine how Missouri educators felt about merit pay, the questions were created for a specific audience: educators and educational leaders.

A field-test was completed by 20 educators randomly selected to complete the survey. As a result of the comments collected, several questions were rewritten for clarification. After review by the dissertation committee additional survey questions were refined to reflect the research questions.

Qualitative data. Qualitative data were collected through interviews with state-level education leaders across the state. According to Gay and Airasian (2000), “Qualitative research seeks to probe deeply into a topic in order to understand the way things are, why they are that way, and how the participants perceive them” (p. 16). Qualitative data were collected in the form of narratives or verbal responses (Gay & Airasian, 2000). Analyzing and focusing on key terms, data were evaluated to determine common words and phrases as well as opposing views. By applying a rich description, or narrative text, from the interviews, quotations were used to communicate the voice of the participants.

Once the interview responses were transcribed, an open and axial coding process was applied to identify common words and phrases. As a result, categories and themes began to emerge. To establish the credibility of the research study, multiple sources

served to triangulate the data. According to Gay and Airasian (2000), “Triangulation, a form of cross-validation, seeks regularities in the data by comparing different participants, settings, and methods to identify reoccurring results” (p. 252). From the data collected via interviews, surveys, *t*-test results, and review of literature, conclusions were drawn based on the perceptions of educators and education leaders regarding the topic of merit pay.

Ethical Considerations

The Lindenwood Institutional Review Board reviewed the application for research and approval was granted (see Appendix H). Suggestions were offered to enhance the research project. Confidentiality was explained to the participants in the Letter of Informed Consent form. Each interviewee was assigned a pseudonym to maintain confidentiality. At no time were the participants subject to harm, and professional integrity was upheld through the entire process allowing for an accurate collection and analysis of data.

Summary

Merit pay has become a major topic of discussion by educators, researchers, and politicians. Perceptions about merit pay were collected through the use of surveys distributed to education personnel throughout the state including certified public school teachers, superintendents, assistant superintendents, principals, assistant principals, and directors at the district level. Through interviews with state-level educational leaders, educational leaders in the three professional organizations in Missouri, state board members, and legislators, perceptions of merit pay were identified. The perceptions of

merit pay and the impact on recruitment and retention of highly-qualified teachers were examined.

In Chapter Four, the quantitative and qualitative data were analyzed. The responses from the surveys were tallied, and the results were depicted through visuals to ensure understanding of the data. Intertwined throughout Chapter Four and Chapter Five are personal responses from the surveys and interviews as relevant to the research questions. In Chapter Five, the findings of the study, implications, and recommendations were discussed.

Chapter Four: Analysis of Data

Education reformers believe merit pay, if implemented, will ensure the recruitment and retention of highly-qualified teachers. In addition, these same reformers believe paying educators based on student test scores will dramatically increase student achievement. *Race to the Top* and recent legislation in other states have caused merit pay to become a topic of interest in Missouri. Currently, over 96% of all school districts across the nation utilize a traditional salary schedule rewarding educators with years of experience and educational attainment (Gratz, 2009a; Hurley, 1985). A few districts have implemented merit pay systems with mixed results. This has led to conflicting views of merit pay among educators, legislators, government officials, community members, education leaders, and others.

The primary purpose of this study was to examine the perceptions of educators regarding the merit pay system. This group included certified public school teachers, superintendents, assistant superintendents, principals, assistant principals, and directors. The aforementioned groups were presented with surveys to gather their perceptions and opinions on the topic of merit pay. The perceptions of state-level educational leaders and professional organization leaders were also examined in regard to merit pay. This group included educational leaders from the three professional organizations in Missouri (MAFT, MSTA, and MNEA) as well as state board members, and legislators. The abovementioned groups were interviewed via electronic mail or phone conversation regarding perceptions and opinions of merit pay. The secondary purpose of this study was to examine the perceptions of educators on the impact of merit pay on recruiting and retaining highly-qualified teachers.

Descriptive Analysis—Demographics

The first seven questions of the survey were designed to collect demographic information on each participant. Participants were prompted to identify their gender, years of experience, job title, work assignment, and position. In addition, the participants identified their district size and association affiliation. This information was disaggregated into groups to determine subgroup responses.

Survey question 1: Identify gender. The surveys were distributed to educators across Missouri with 219 returned out of 996 circulated. This was an overall return rate of 22%. Of the surveys collected, 39 were male educators and 180 were female.

Survey question 2: Indicate your current level of experience as an educator. The majority of the survey participants had 11 to 15 years experience, followed closely by teachers who had 26 or more years of experience. The smallest group represented in the survey was teachers who had less than five years of experience. The participants represented a fairly-balanced group based on years of experience (see Table 1).

Table 1

<i>Years of Experience</i>		
Years of Experience	Survey Results	Percentages
0-5 years	22	10%
6-10 years	37	17%
11-15 years	55	25%
16-20 years	29	13%
21-25 years	29	13%
26 or more years	47	21%

Note. Percentages are rounded to nearest whole number and do not total 100%.

Survey question 3: Indicate your category as an educator. Teachers who had earned tenure comprised the largest group of participants. Seventy-nine percent were tenured while 19% were non-tenured. Only 42 of the 219 educators were non-tenured, while four identified administration as the selected response. It is not known if the administrators were tenured as teachers. One participant wrote *other* in the margin and did not further identify the category (see Table 2).

Table 2

Category as an Educator

Category	Survey Results	Percentages
Tenured	171	79%
Non-tenured	43	19%
Administrator	4	1%
Other	1	1%

Note. Other category responses included one higher education and one student teacher.

Survey question 4: Indicate your work assignment. Educators identified their work assignment by selecting a category which reflected the position in which they worked. The work assignments were comparable in number for elementary, middle, and secondary schools. The categories consisted of 76 elementary educators, 70 middle school educators, and 55 secondary school educators. Early childhood and combination assignments were much lower with 17 educators out of the 219 working in these areas (see Figure 1).

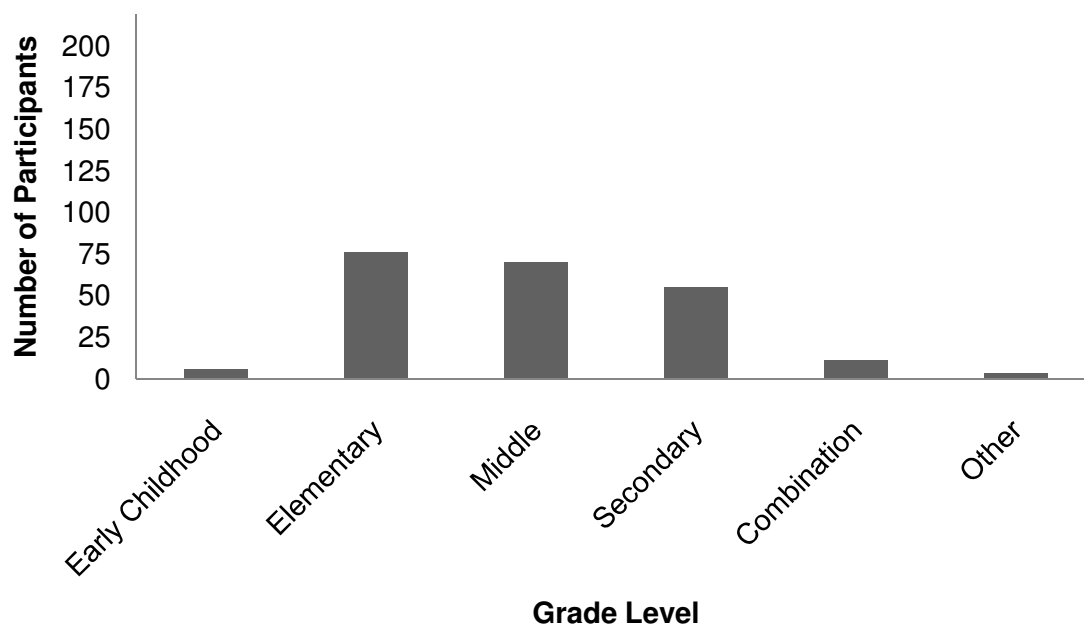


Figure 1. Participants' work assignments by building level.

Survey question 5: Indicate your current position. Classroom instructors were the largest group in this study. Surveys were completed by 219 individuals, and of those, 209 participants served in some capacity of classroom instruction. These educators either taught the core subjects, special education, library or media courses, or other specialized areas such as physical education, art, and French. Four participants served in administrative roles as superintendent, principal, assistant principal, or director. There were five educators who worked in roles which included higher education, nurses, and technical support personnel (see Table 3).

Table 3

Current Positions of Participants

Current Position	Survey Results	Percentages
Classroom Teacher	135	62%
Specialty Area	39	18%
Library/Instructional Media	8	4%
Special Education	27	12%
Superintendent	1	0.5%
Principal	1	0.5%
Assistant Principal	1	0.5%
Director	1	0.5%
Other	5	2%

Note. Percentages are rounded to nearest half point to equal 100%.

Survey question 6: District size (based on student population). The participants were prompted to select their district size based on student population. Three choices were available for selection: less than 1,499, 1,500-2,999, or over 3,000. The majority, 188 of the 219, were employed in districts with over 3,000 students. This represented 86% of the group. Those participating who were employed in districts with student enrollments of 1,500-2,999 included 18, or 8% of those surveyed. The remaining 12 participants were employed in districts with less than 1,499 students (see Figure 2).

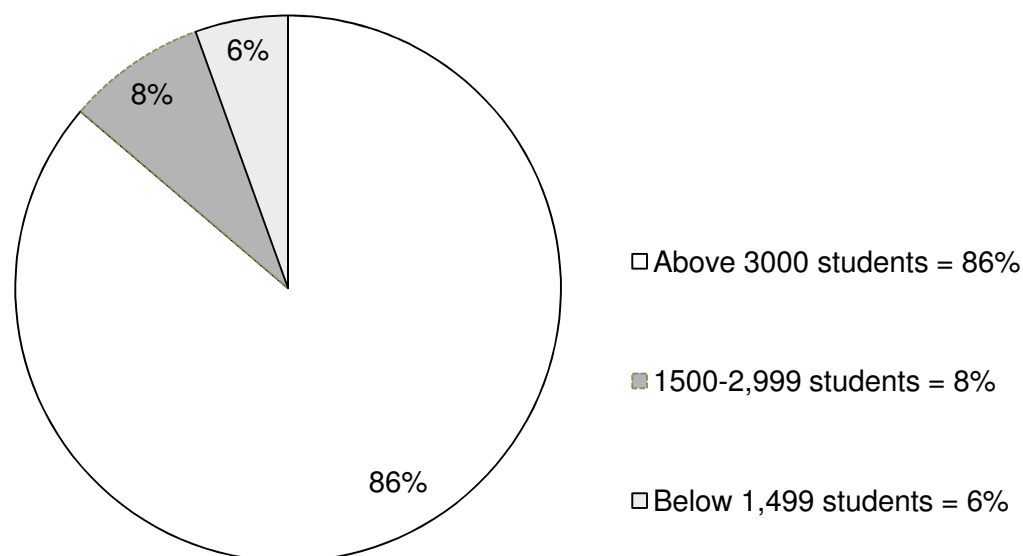


Figure 2. District size by student population.

Survey question 7: Association affiliation. The Missouri educators who were surveyed maintained membership in several education associations. Those surveyed were affiliated with the MNEA, MSTA, National Association of Secondary School Principals (NASSP), or did not have any association affiliation. Missouri NEA (MNEA) serves 35,000 public school teachers, other education personal, administrators, and faculty in colleges and universities (MNEA, 2002). The MNEA is affiliated with the NEA which has over 3.2 million members (MNEA, 2002). The MSTA serves 44,000 educators across the state and is comprised of local Community Teachers' Associations (CTA) in school districts (MSTA, 2005). The NASSP is an organization with 30,000 members including middle-level and high school principals, assistant principals, and aspiring school leaders from across the United States and in 45 countries around the world (NASSP, 2010).

Educators who belonged to the MSTA represented 19% of the total surveyed, while 79% of the participants belonged to the MNEA. The remaining 1% belonged to either NASSP or another organization which was not listed. Only 1% of the participants did not belong to any education organization. Due to the fact the MAFT did not hold a fall conference; there were not any participants from this group (see Figure 3).

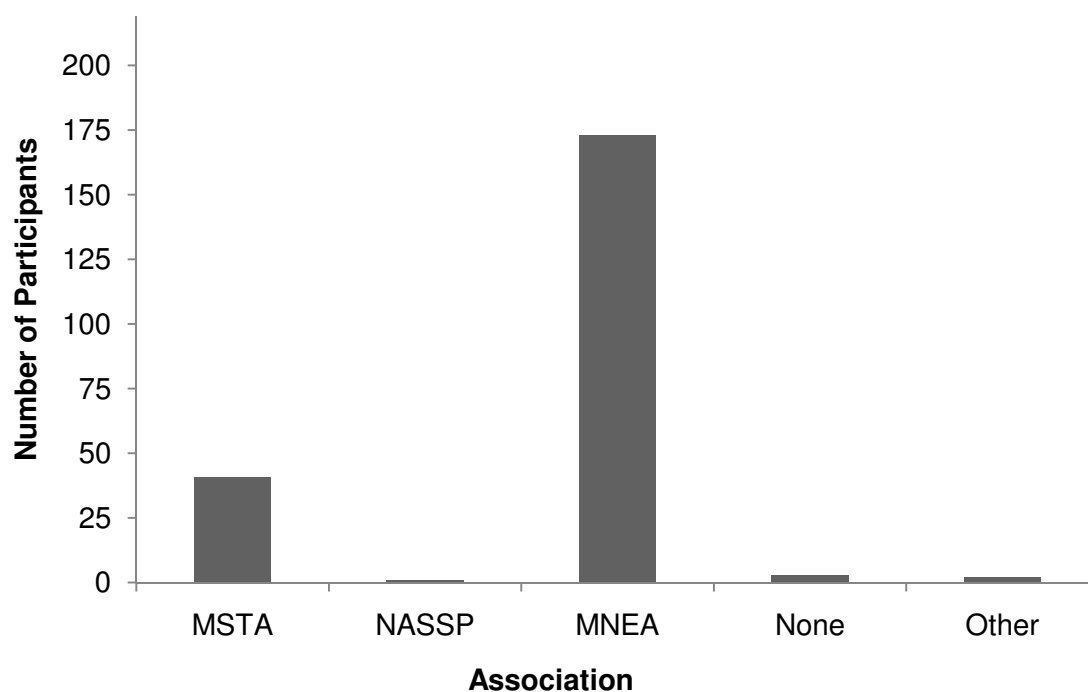


Figure 3. Participants' education association affiliation.

Survey question 8: The current pay structure (salary schedule) is an adequate way to pay educators. According to Hurley (1985), the traditional salary schedule has proven to be the most viable method for compensating teachers. Currently, 95% of the school districts across the United States utilize the traditional salary schedule (Wisconsin Center for Education Research, 2008). The majority of the educators agreed the current

pay structure was adequate. Seventy percent strongly agreed or agreed compared to 22% who disagreed or strongly disagreed the current pay structure was adequate. There were 13 educators, or 6%, who were neutral on the issue (see Figure 4).

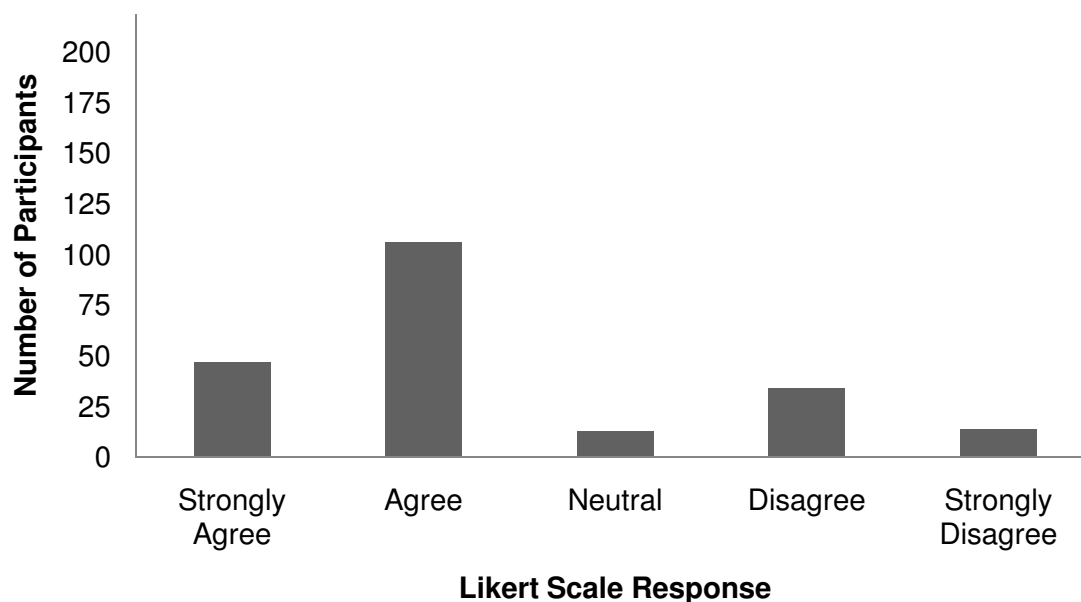


Figure 4. Current salary schedule is an adequate way to pay educators.

Survey question 9: I would consider working in a district that offered merit pay.

As shown in Figure 5, the majority of the educators would not consider working for merit pay. Of those surveyed, 140, or 64%, disagreed or strongly disagreed to working in a district offering merit pay. Only 19%, or 41 educators, agreed or strongly agreed to working in a district offering merit pay.

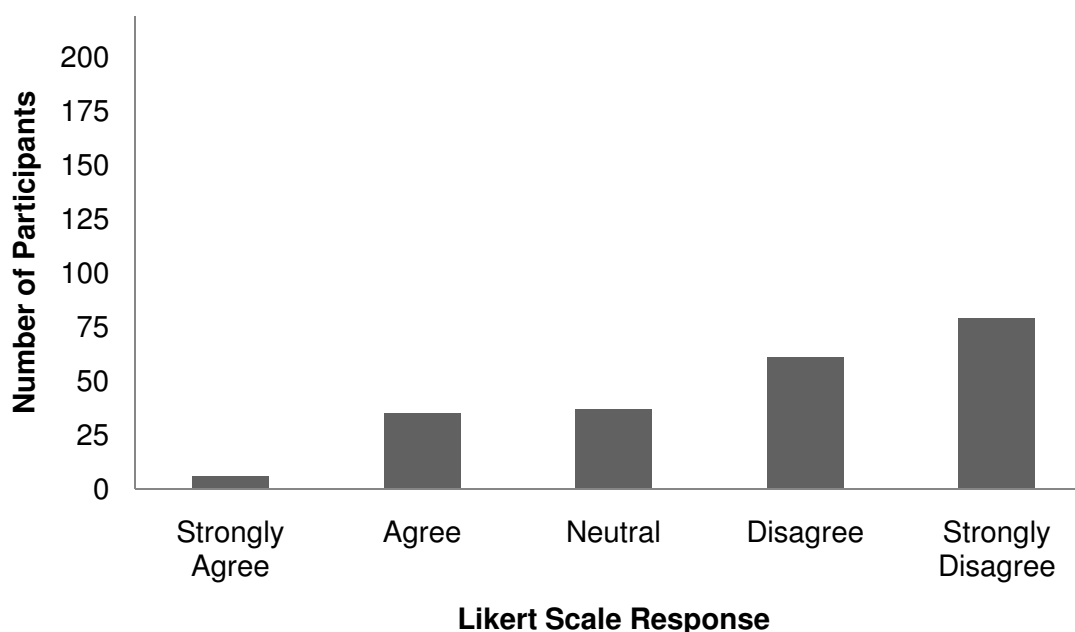


Figure 5. Would consider working for merit pay.

Survey question 10: I would work for merit pay if only based on student test scores. When teachers are paid based on test scores, pressures to teach-to-the test occur. Additionally, focus can be placed on students who score near the mandated proficiency level, or there is a lack of focus on other students deemed unable to reach proficient or advanced on state tests (NEA Department of Collective Bargaining and Member Advocacy, 2008a; Ravitch, 2010b). Both the MNEA and the MSTA opposed merit pay which includes the use of standardized test scores or other subjective criteria as a method to determine salary increases (MSTA, 2010; NEA Department of Collective Bargaining and Member Advocacy, 2008a). Contrary to educators' views are the views of parents. In 2005, over half of the participants (parents) in the Phi Delta Kappa Gallup Poll believed test scores should be a measure of a teacher's performance (Gratz, 2009a).

In this study, educators overwhelmingly responded they would not work for merit pay based only on student test scores. Of those surveyed, 210 educators, or 96%, believed merit pay based only on student test scores was not acceptable. The remaining 4% were either neutral on the issue of working for merit pay tied to student test scores or this question was not applicable to the position they held (see Figure 6).

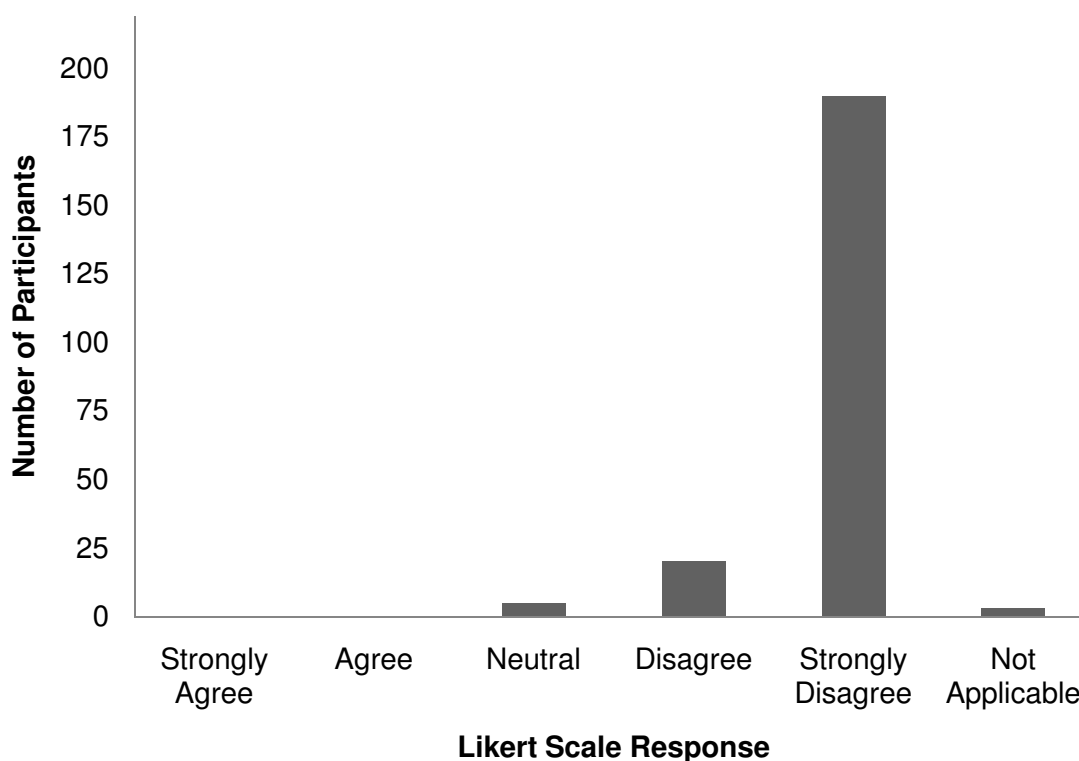


Figure 6. Would work for merit pay if based on student test scores.

Survey question 11: I would work for merit pay if tied only to the performance of students in my classroom (individual growth, portfolios, targeted growth, etc). Many people assume every teacher has an equal opportunity for success; however, that is not true. Teachers do not have control over some issues in the classroom, such as student

assignment, student background, or courses taught (Amrein-Beardsley, 2009; Ravitch, 2010b). Less than 20% of the educators surveyed would work for merit pay based on the performance of students in their classrooms. Over 70% disagreed or strongly disagreed they would work for merit pay based on their students' performance. The remaining 9% were either neutral on the issue or this was not applicable to their position (see Figure 7).

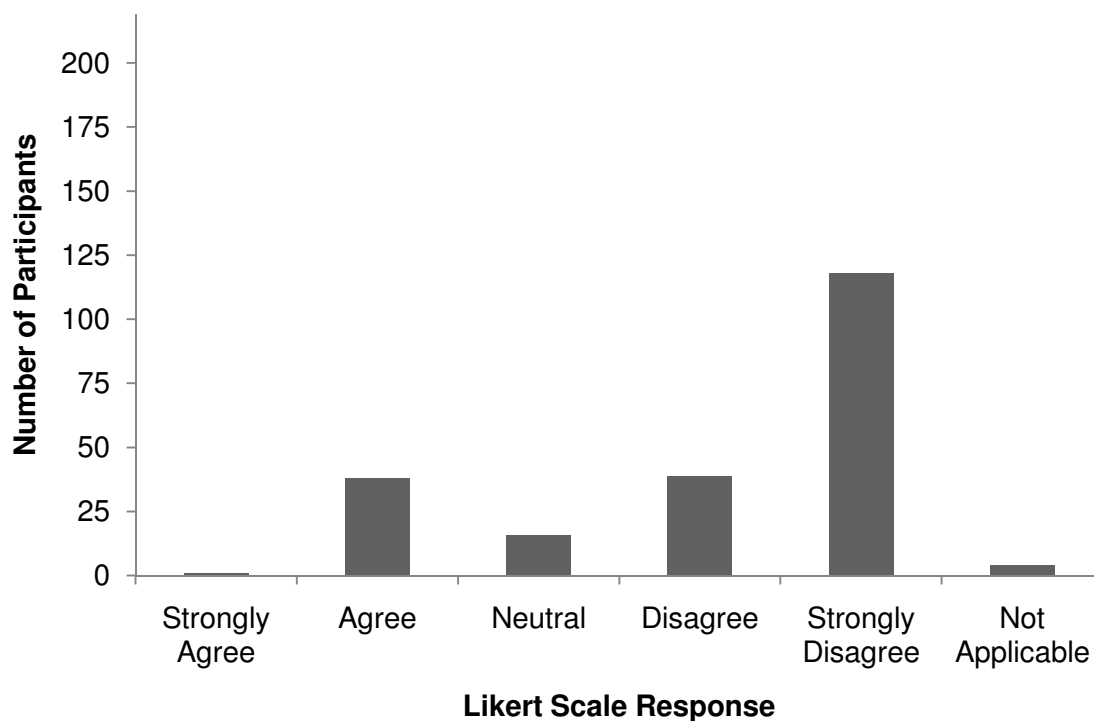


Figure 7. Would work for merit pay based on the performance of my students only.

Survey question 12: I would work for merit pay if tied to building-wide performance criteria. The AFT has determined that a well-designed compensation system should be voluntary, school-wide, and promote a collaborative work environment (AFT, 2010). New York City paid school-wide bonuses if test scores rose, and a committee decided who earned a bonus and the amount (Ravitch, 2010b). The idea of a

school-wide bonus does not limit the bonus to just teachers, but includes all staff including non-teaching personnel (Ravitch, 2010b). Support for merit pay continues to be absent even if the criteria for a building-wide plan includes participation by the entire staff. In this study, only 7% felt they would be willing to work for merit pay if tied to building-wide performance criteria while the remaining 77% disagreed or strongly disagreed to working for merit pay based on building-wide performance (see Figure 8).

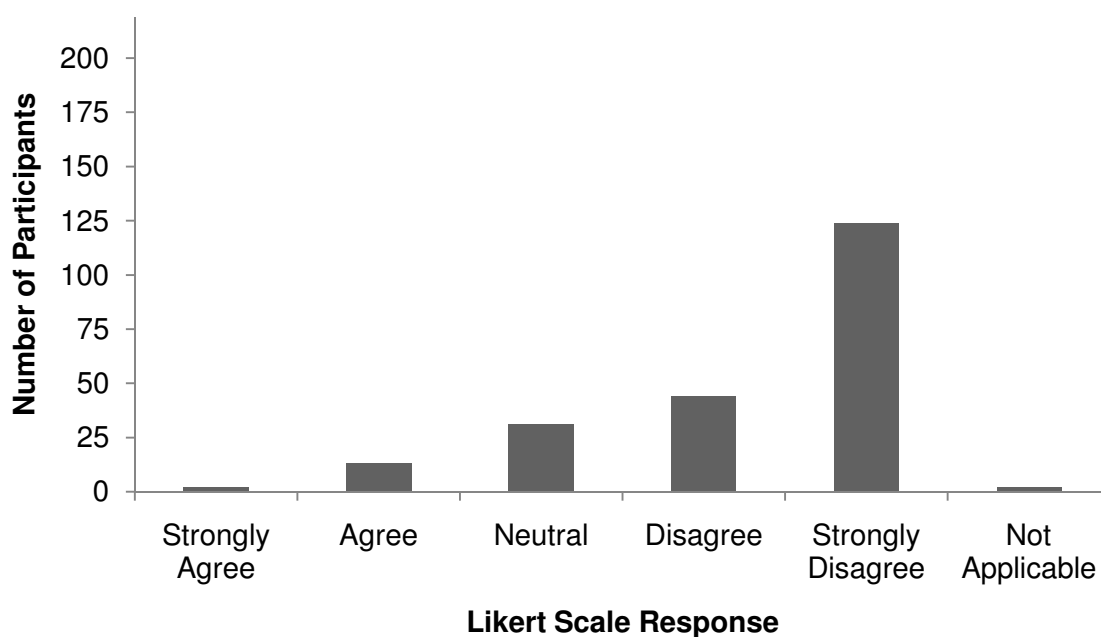


Figure 8. Would work for merit pay based on building performance.

Survey question 13: Merit pay is the best option to increase teacher wages.

There is support for alternative methods of compensation for education personnel ranging from paying teachers for extra duties, earning national certification, or offering a tiered plan (AFT, 2010; Johnson & Papay, 2009; NEA Department of Collective Bargaining and Member Advocacy, 2008a; Rothstein, 2001). Ideas vary on the methods to which

these pay plans should be created and evaluated. This was evident in the survey results. An overwhelming majority of educators, 90%, disagreed or strongly disagreed merit pay was the best option to increase teacher wages. Only 3% agreed merit pay was the best option, and the remaining 6% were neutral on the issue (see Figure 9).

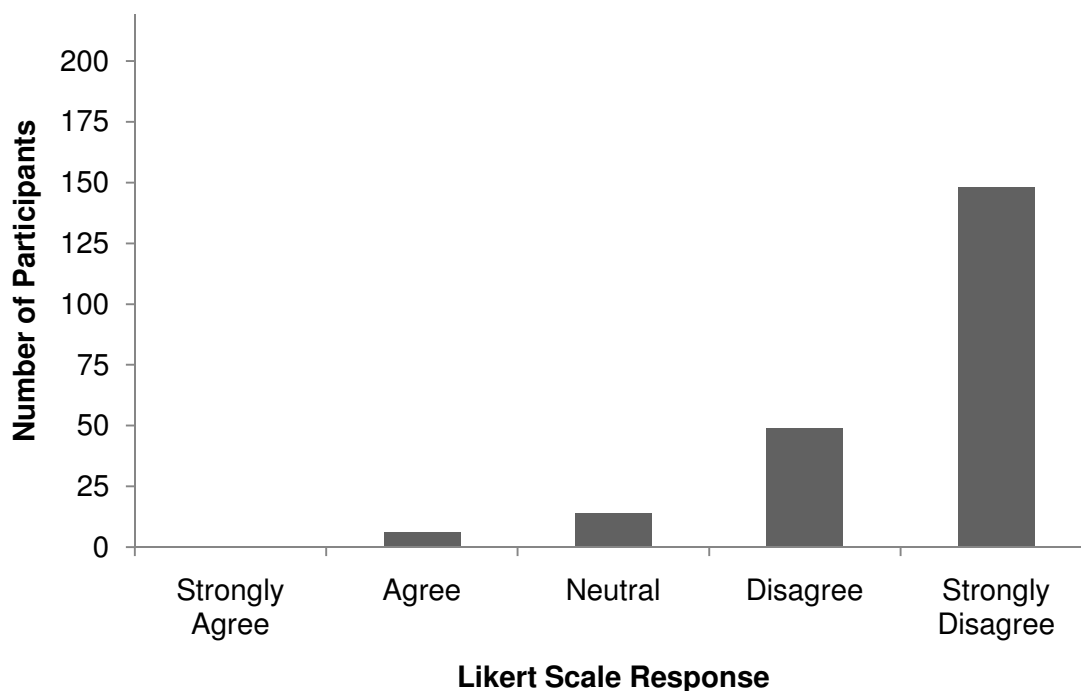


Figure 9. Merit pay is the best option to pay educators.

Survey question 14: Merit pay is a fair way to measure teacher performance. As shown in Figure 10, almost 90% of those surveyed believed merit pay was not a fair way to measure teacher performance. Only 2% agreed that merit pay was a fair way, and 17, or 8%, of those surveyed were neutral on whether merit pay was a fair way to measure teacher performance.

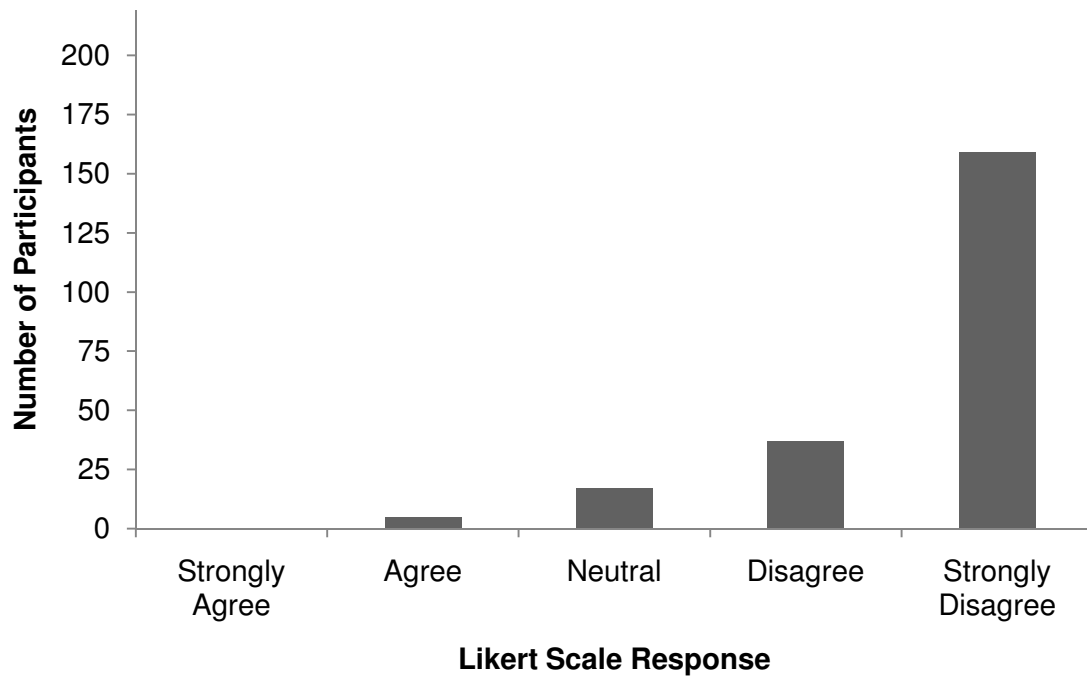


Figure 10. Merit pay is a fair way to measure teacher performance.

Survey question 15: I am concerned my district will move to merit pay during the remaining years of my career. Educators were almost evenly divided regarding concerns over their district moving towards merit pay during their careers. Those educators who strongly agreed or agreed (41%) only slightly outnumbered those who disagreed or strongly disagreed (34%). Over 20% were neutral on the issue (see Figure 11).

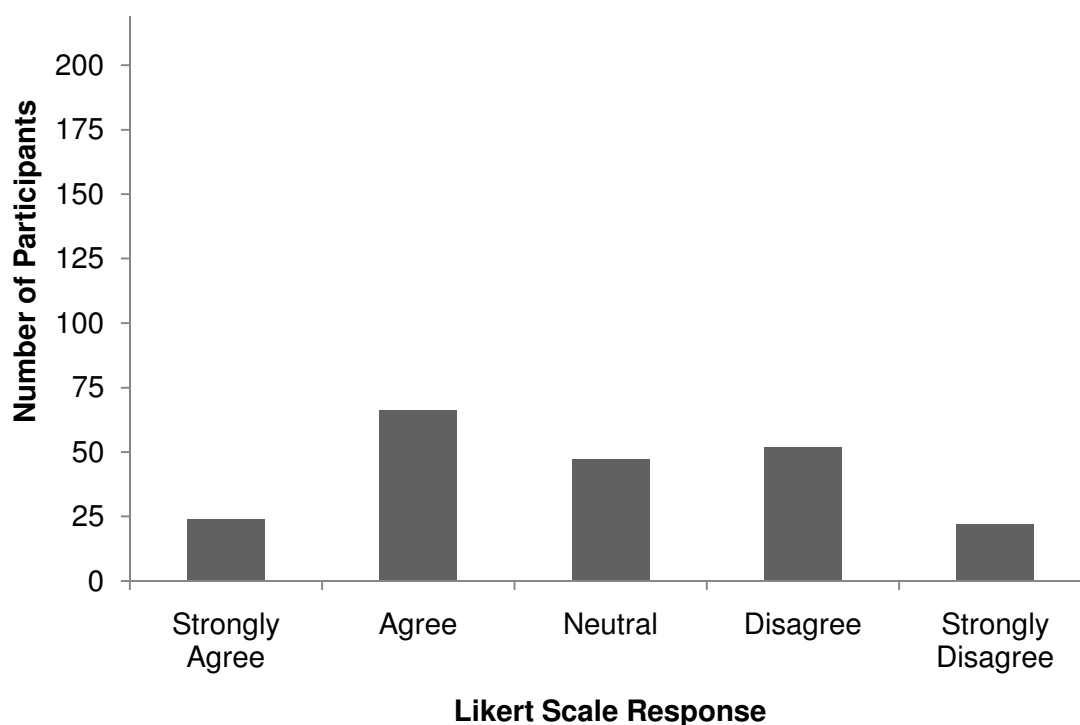


Figure 11. Concerned my district will move to merit pay during my career.

Survey question 16: My beliefs regarding merit pay are influenced by my professional association's beliefs. As mentioned earlier, 99% of those surveyed were members of education associations across Missouri. Despite this large number, 48% disagreed or strongly disagreed their beliefs about merit pay were influenced by the association and its beliefs. On the other hand, 34% strongly agreed or agreed association beliefs influenced their viewpoints. The remaining 16% were either neutral on the issue, or the statement was not applicable (see Figure 12).

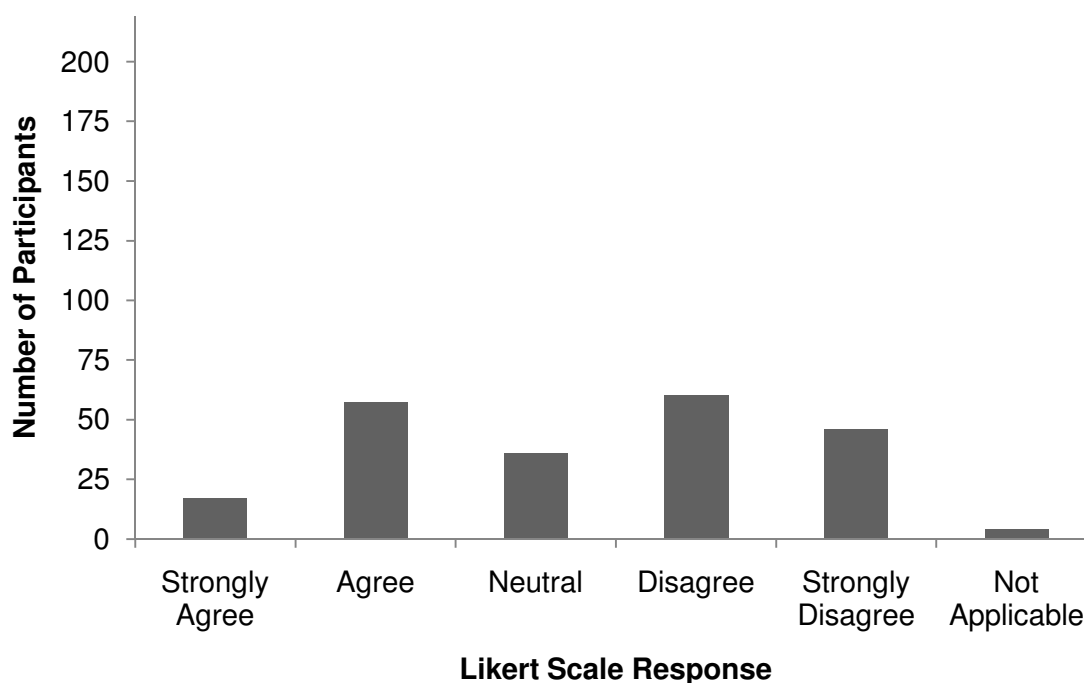


Figure 12. My beliefs are influenced by my professional organization.

Survey question 17: Merit pay will impact the recruiting of future educators.

School districts that want to recruit and retain educators must offer compensation which reflects the community's respect for them as professionals (Ravitch, 2010b). Ravitch (2010b) pointed out districts would use merit pay to fill hard-to-staff areas, pay for extra duties, and for hard-to-staff schools. Merit pay would impact the recruitment of future educators, according to those surveyed. Over 80% strongly agreed or agreed merit pay would have an impact. However, many educators wrote on the survey the word *negatively*, implying the impact would not be positive. This is further explained in the study when question 24 is addressed. Only 10% stated they disagreed or strongly

disagreed merit pay would impact the recruitment of future educators. Nine percent were neutral on the issue (see Figure 13).

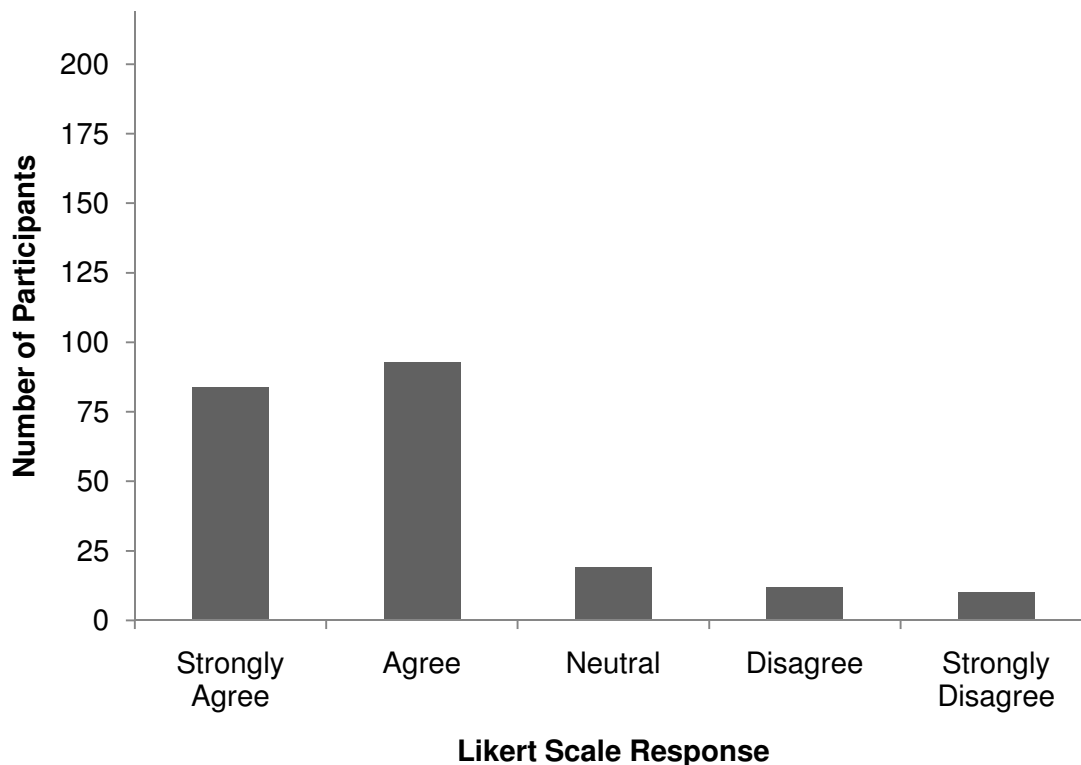


Figure 13. Merit pay will impact the recruitment of educators.

Survey question 18: Merit pay will impact the retention of highly-qualified teachers. Ravitch (2010b) stated, “If we fail to attract and retain teachers...will we produce a better-educated citizenry? Will our schools encourage the innovative thinkers who advance society? It’s not likely” (p. 194). Hess (2010) agreed a merit pay system would allow for the recruitment and retention of effective teachers.

The majority of those surveyed (76%) believed merit pay would impact the retention of highly-qualified teachers. Only 16% disagreed merit pay would impact the retention of teachers. The remaining 15% were neutral on this issue (see Figure 14).

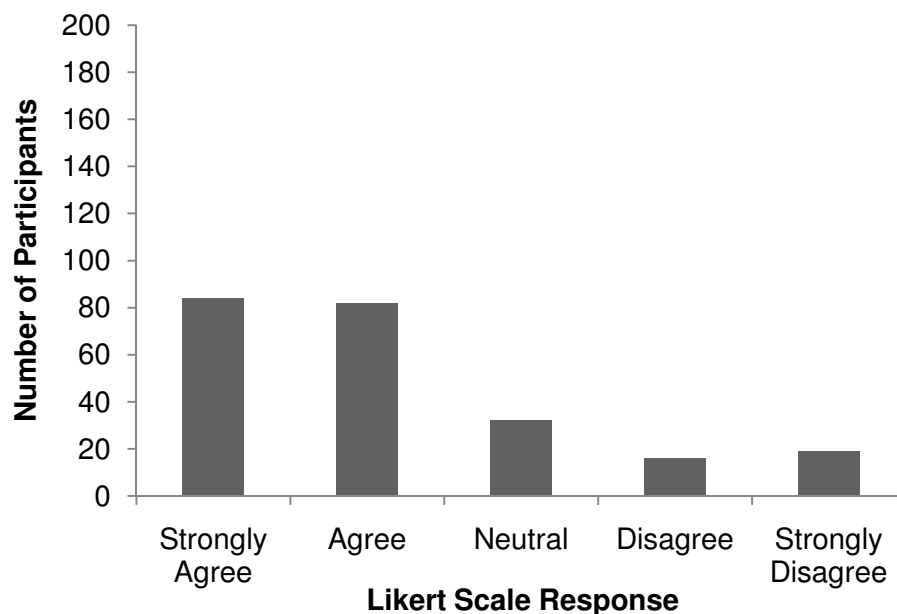


Figure 14. Merit pay will impact the retention of highly-qualified educators.

Survey question 19: Merit pay should be tied to. The participants were able to select from a list of criteria which ones should be tied to merit pay. Those surveyed were allowed to select as many criteria as they wanted or write in additional criteria. A total of 485 responses were recorded, and the most popular criterion chosen which should be tied to merit pay were portfolios with 102 votes. The second choice was principal evaluations with 88 votes and third was peer evaluations with 61 votes. The lowest named category from the list was district test scores, which garnered 38 votes. Additional votes were cast for the following criteria: gains in test scores (12), student improvement (13), student

evaluations (6), involved in school activities (5), union representation (2), professional development (4), teaching performance (6), and years of experience (3). Of the surveys returned, 24 were left blank (see Table 4).

Table 4

Merit Pay Should be Tied to the Following Criteria

Criteria	Survey Results	Percentage
State Test Scores	24	5%
District Test Scores	38	8%
Peer Evaluations	61	13%
Principal Evaluations	88	18%
Parent Evaluations	42	9%
Portfolios	102	21%
Other but not Listed	6	1%
None	48	10%
Did not Answer	24	5%
Attendance	1	0.2%
Gains in Test Scores	12	2%
Student Improvement	13	3%
Student Evaluations	6	1%
Teachers Involved in School Activities	5	1%
Union Representation	2	0.4%
Professional Development Activities	4	1%
Teacher Performance	6	1%
Experience	3	0.6%

Note. Participants could answer as many times as needed resulting in 485 total responses.

Survey question 20: If a merit pay plan were developed, who should be involved? The participants were able to select from a list of individuals they felt should be involved in developing a plan for a merit pay system. Those surveyed were allowed to select as many individuals as they wanted or write in other individuals who should be involved. A total of 920 responses were recorded, and the most popular choice was teachers with 204 votes. The second choice was professional organizations with 164 votes and third was administrators with 153 votes. Nine educators stated no one should be involved in creating a merit pay system as they were opposed to the whole process. Also, 21 educators marked *other* but did not identify which individuals should be involved. The least named from the list were business leaders which garnered only 15 votes. Additional votes were cast for the following: collective bargaining teams (2), school board members (1) and none (9) (see Table 5).

Table 5

Individuals Who Should be Involved in Developing a Merit Pay Plan.

Individuals	Survey Results	Percentage
Parents	78	8%
Students	55	6%
Teachers	204	22%
Administrators	153	17%
Community Members	43	5%
Business Leaders	15	2%
District Leaders	103	11%
State Leaders	23	3%
Professional Organizations	164	18%
Local Colleges/University	49	5%
Other	21	2%
None	9	1%
Collective Bargaining	2	0.2%
School Board Members	1	0.1%

Note. Participants could answer as many times as needed resulting in 920 total responses.

Survey question 21: If merit pay were implemented, who should monitor and evaluate the system? In a survey conducted by Scholastic and the Bill and Melinda Gates Foundation, 78% of the teachers responded principals are somewhat trustworthy when it came to rating job performance (Toppo, 2010). The participants in this study were able to select from a list of individuals identifying who should monitor and evaluate a merit pay system. Those surveyed were allowed to select as many individuals as they wanted or write in additional personnel they believed should help in monitoring and evaluating the

plan. A total of 708 responses were recorded. The most popular individuals selected to monitor and evaluate a merit pay system were teachers with 177 votes. The second choice was professional organizations with 139 votes, and third were administrators with 133 votes. Twelve educators stated no one should monitor or evaluate a merit pay system as they were opposed to the process. Four educators marked *other* but did not identify which individuals should be involved. Receiving the lowest number were business leaders which garnered only nine votes (see Table 6).

Table 6

Individuals Who Should Monitor and Evaluate a Merit Pay Plan.

Individuals	Survey Results	Percentage
Parents	39	6%
Students	25	4%
Teachers	177	25%
Administrators	133	19%
Community Members	29	4%
Business Leaders	9	1%
District Leaders	95	13%
State Leaders	16	2%
Professional Organizations	139	20%
Local Colleges/University	28	4%
Other	4	0.6%
None	12	2%
Collective Bargaining	1	0.1%
School Board Members	1	0.1%

Note. Participants could answer as many times as needed resulting in 708 total responses.

Survey question 22: In your opinion, what are the advantages of a merit pay system? Participants were able to express individual thoughts and opinions regarding the advantages of merit pay in this open-ended question. Analyzing and focusing on key terms, data were evaluated to determine common ideas. Using an Excel spreadsheet, key words were identified in participants' answers and entered into a spreadsheet. To tabulate the results of quantitative data, the data can easily be transferable to a numerical form, which is best recorded in spreadsheets (WriteWork, 1995). The spreadsheet was customized to allow for multiple columns to record grouping of related answers and tabulate responses of participants. Identifying the key words in all 219 participants' responses resulted in eight key ideas as advantages of merit pay (see Table 7). The key ideas which emerged from the survey results included: increased salary, improved lessons, encouraged teacher reflection, implementation of multiple assessments, application of data, elimination of poor teachers, encouraged teacher collaboration, and political in nature.

The most popular advantage of a merit pay system was helping teachers in the area of salary. The comments from educators revealed teachers could earn more money for a good job or for extra duties above teaching. Participant 84, a teacher in a larger district with 11-15 years of experience affirmed:

As a good teacher who puts in a lot of extra time (I don't show up at contract time and run out the door at the end of the day), and administration puts extra kids in my room (because I am a good teacher), merit pay could benefit me.

The second key to emerge as an advantage of a merit pay system was lessons

would improve. Participant 54, a teacher with over 26 years of experience, confirmed:

I think that the only advantage I can foresee would be if merit pay is based on teacher effort — by that I mean teachers who continue challenging their own ways of teaching, involvement in committees, etc. Teachers who continually grow in their craft as opposed to those who do the same thing year after year would be rewarded.

Participant 113, a teacher in the middle of her career responded, “Teachers who motivate their students and inspire them to think outside the box, problem-solve, and improve self esteem, should be recognized through merit pay.”

Other advantages of a merit pay system included teacher reflection, the use of data and multiple assessments. Participant 120, an educator with over 26 years of experience surmised, “[Merit pay] promotes quality education and opportunities for additional pay for highly motivated and quality teachers. [Merit pay] rewards those individuals and or grade levels who go above and beyond to help their students make growth.”

Conversely, 88 participants responded there were no advantages to merit pay.

Participant 5, a tenured teacher with 16-20 years of experience wrote:

It has none! It creates “lone rangers,” cheating, “climbing” over your colleagues to get to the top of the heap. It becomes a popularity contest! It creates dissension amongst our ranks as professional educators. Then there are those of us that don’t want to play the game!

Another Participant, number 40, a veteran teacher with over 26 years of experience

replied:

All the research has shown that merit pay systems do not improve instruction nor achieve high academic achievement. We have tried this numerous times in the history of education, and it did not accomplish the goals to improve education and retain and recruit teachers.

Participant 99, a career teacher, argued, “None as it exist. Merit pay should take into account difficulty of student population, amount of outside classroom time required for effectiveness, training time, time required for involvement with student homes and sometimes combat pay.”

In Table 7, the eight key ideas recognized as advantages of merit pay are presented. Because participants were able to list multiple advantages of merit pay, the total responses tallied 275. Several participants did not answer the question or stated there were no advantages.

Table 7

Advantages of a Merit Pay System

Advantage	Survey Results	Percentages
Helps Increase Teacher Salaries	106	39%
Improves Lessons	29	11%
Teacher Reflection	15	5%
Teachers Use Multiple Assessments	3	1%
Teachers Use Data	4	1%
No Advantages	88	32%
Did not Answer	14	5%
Eliminates Poor Teachers	11	4%
Allows for Teacher Collaboration	3	1%
Political in Nature	2	1%

Note. Participants could provide multiple advantages of merit pay resulting in more than 219 responses.

Survey question 23: In your opinion, what are the disadvantages of a merit pay system? Participants were able to express individual thoughts and opinions regarding the disadvantages of merit pay in this open-ended question. Identifying key words allowed for the creation of Table 8. Comments varied in length and opinion. Educators identified 16 key ideas as disadvantages of merit pay.

The most common disadvantage identified by the participants was school population or school makeup. Educators were extremely concerned about the factors in children's lives out of their control, such as socio-economic status, home life, race, parent involvement, and education home. In addition, the type of school educators were assigned to was a concern. Teachers do not always have a choice in which type of school

they are assigned. Participant 5, an educator with 16-20 years of experience, confirmed, “Unlevel playing field and lots of discriminators come into play, many of which we have no power or control over. Transient populations, absenteeism, lack of parental commitment to get their child to school and on time. Poverty of our families!” Participant 9, an educator and parent, was concerned about her child if placed in a classroom where a teacher might be penalized merit pay due to her child’s test scores. She worried:

As a parent of a student that has academic difficulties and low test scores, who would want to teach him? If a teacher would be penalized because they had him in classroom how could this be fair to them or HIM?

Two other major disadvantages identified by participants were competition between teachers and the lack of collaboration. Participant 54, a career teacher with over 26 years of experience, acknowledged, “Teaching should be a collaborative effort and many forms of merit pay seem to encourage competition rather than collaboration. Also if merit pay is based on student performance then this would discourage teachers to work with low-performing children.” Participant 67, a teacher with 6-10 years of experience, responded:

Merit pay could create a viciously competitive environment for teachers, thus toppling all the work to create collaboration and sharing for the best of our students. Collaboration is crucial to increasing student achievement. Merit pay could prevent teachers from sharing best practices with colleagues.

Participant 86, a non-tenured teacher with over 26 years of experience who just recently

moved school districts, echoed the same thoughts:

Merit pay would only create an atmosphere of mistrust, fear, and solitude.

Teachers would not collaborate with fellow teachers to create a positive atmosphere of learning. The real losers, if a merit pay system would take place, would be our students, our future leaders.

Participant 124 asked, “Why would I share my great lesson plans/ideas if it could possibly make another teacher look better than me?”

Evaluator bias was another disadvantage identified by 68 of the 219 participants.

Participant 125, a teacher with 11-15 years of experience, wrote:

Administrators would not be fair in their evaluations of all teachers. You might have an excellent teacher in the classroom, but because they are an advocate for teacher rights in the building or district level, they are frowned upon, etc. You know that will absolutely weigh in on an evaluation.

Participant 185, a teacher with more than 26 years of experience, responded, “In my school, the same three people are always chosen. The *young* man, the *young* woman, and the principal’s ‘snitch.’ So who do you think would get merit pay!!! I feel it would just be a popularity contest.”

Other areas identified as disadvantages included jealousy between staff, fear, and the process being unfair. Educators expressed concerns regarding cheating on the test, the extra paperwork, and basing merit pay on a poor quality test. Several participants replied teachers did not teach for money and good teachers might leave the profession. Several of the participants did not answer the question.

Table 8

Disadvantages of a Merit Pay System

Category	Survey Results	Percentage
Creates Jealousy	14	3%
Unfair	75	14%
Causes Fear	12	2%
Reduces/Eliminates Collaboration	80	15%
Evaluator Bias	68	13%
Varying Student Population/School Makeup	104	20%
Pits Parent Against Parent	5	1%
Stealing of Ideas	8	2%
Encourages Cheating on Test	15	3%
Creates Competition Among Teachers	89	17%
Robs the Salary Schedule	7	1%
Excessive Paperwork	4	1%
Poor Test as Evaluation Tool	19	4%
Hoop-Jumping for Educators	7	1%
Money not a Motivator	5	1%
Exodus of Good Teachers	5	1%
Did Not Answer	11	2%

Note. Participants could answer as many times as needed resulting in 528 total responses.

Survey question 24: In your opinion, what impact would merit pay have as a motivator for recruiting and retaining highly-qualified educators? Participants were able to express their individual thoughts and opinions regarding the impact of merit pay as a motivator for recruiting and retaining highly-qualified educators in this open-ended

question. Participants' answers were sorted into four categories: motivator for recruitment, not a motivator for recruitment, motivator for retention, and not a motivator for retention (see Figure 15). Comments varied in length and opinion.

Over all, the majority of the participants did not think merit pay would be a motivator to recruit and retain highly-qualified educators. One hundred-five participants thought merit pay would not be a motivator to recruit educators, while 113 participants responded merit pay would not be a motivator to retain highly-qualified educators. Those educators who responded merit pay would not be a motivator to recruit identified several ideas why. Participant 109, a female teacher with 21-25 years of experience, responded:

As students realize what lies ahead for them and how difficult it will be for them to increase their salary, they will find a different career. They will realize, that as new teachers, they traditionally get the lower level classes, and that will make it harder to increase their salary.

Participant 113, an educator with 11-15 years of experience, confirmed, "I am not sure it would be beneficial as a motivator. There are already so many stressors in the profession; it may be that merit pay will result in potential teachers choosing other professions."

Additional participants had multiple reasons why merit pay would not be a motivator to retain highly-qualified teachers. Participant 61, a female teacher with 11-15 years of experience, declared, "A highly-qualified teacher means educated, certified, and experienced in their craft. Highly-qualified teachers value collaboration with other teachers, not competition between teachers. Students do not win with teacher competition. Merit pay would repel highly-qualified teachers." Participant 67, an

educator with 6-10 years of experience, replied:

I think merit pay might decrease retention of highly-qualified educators, because if it is tied to test scores, you are penalizing teachers for having students that may either have difficulty taking tests or are below grade level, special needs, or struggle some other way. This is an unfair way to reward teachers if overall growth of students depends on teacher efforts. I do not have any thoughts on recruiting. Teachers teach because it is what we love to do, not for the money.

Fifty-five participants identified merit pay as a motivator to recruit educators. Participant 10, an educator with 11-15 years of experience, wrote:

It may help recruit, but it may be people who come into the profession for the wrong reasons. You should be a teacher for the kids, not the money. I honestly don't mind being underpaid — it shows the world why I do what I do.

Participant 48, an educator with over 26 years of experience, proposed, “Young people seem to be motivated by money, and merit pay might encourage young people to pursue teaching as a career. My goal as a young person was ‘to help children who need help’ not money.”

A report conducted by the Economic Policy Institute (NEA Department of Collective Bargaining and Member Advocacy, 2008a) compared teacher salaries to other professions which indicated teacher salaries were 15% lower. This is evident as many teachers are leaving the profession to earn higher salaries elsewhere. Through merit pay, school districts would be able to recruit and retain effective teachers (Hess, 2010). Forty-two participants of this study identified merit pay as a motivator to retain

highly-qualified educators. Participant 125, with 11-15 years of experience, answered:

For me, and I think for retaining highly-qualified educators would be that I would get some kind of recognition for how hard I work — continued with cutting edge professional development, recognition for the many hours I give outside my ‘contract time’ to make my lessons meaningful, motivating, and high quality. Time away from my own family.

Participant 118, an educator with 11-15 years of experience, added:

Highly-qualified educators would only work at schools with gifted or economically blessed students in order to receive high scores. Intelligent potential educators would choose a profession other than education, where their talent would be more fairly rewarded. Highly-qualified teachers at low income or special education schools would be very stressed, require more health services, and drop out of teaching.

Participant 123, an educator with 11-15 years of experience, worried, “Districts with the most money will keep the best teachers, thereby leaving smaller and rural schools out of the running.”

Several educators stated merit pay would not be a motivator for recruitment or retention. Participant 73, with 21-25 years of experience, expressed, “It would not be beneficial; it burns teachers out and eliminates friendships. It does instill a ‘cut-throat’ environment. No one wants to remain or come to a building where there is no collaboration.” Participant 106, an educator with 16-20 years of experience, agreed, “I don’t think it would be a motivator. Actually, I think it would deter people from choosing education as a profession. If the merit pay system were adopted, I certainly would not

recommend anyone to the education field.” Participant 116, a female teacher with 11-15 years of experience, pointed out:

Inner-city or title schools would have a harder time recruiting and/or retaining quality teachers due to the fact there are more obstacles to overcome to educate the children in these areas. The schools are not only responsible for educating the students, but also feeding, clothing, counseling, and basically taking care of a great deal of their basic needs not being met at home.

Participant 74, a male teacher with 16-20 years of experience, summed up compensation in one short thought: “If the pay is high enough, they will come and stay!” A total of 211 participants wrote a comment regarding the effects of merit pay on recruitment and retention of highly-qualified teachers. There were 18 participants who did not answer the question (see Figure 15).

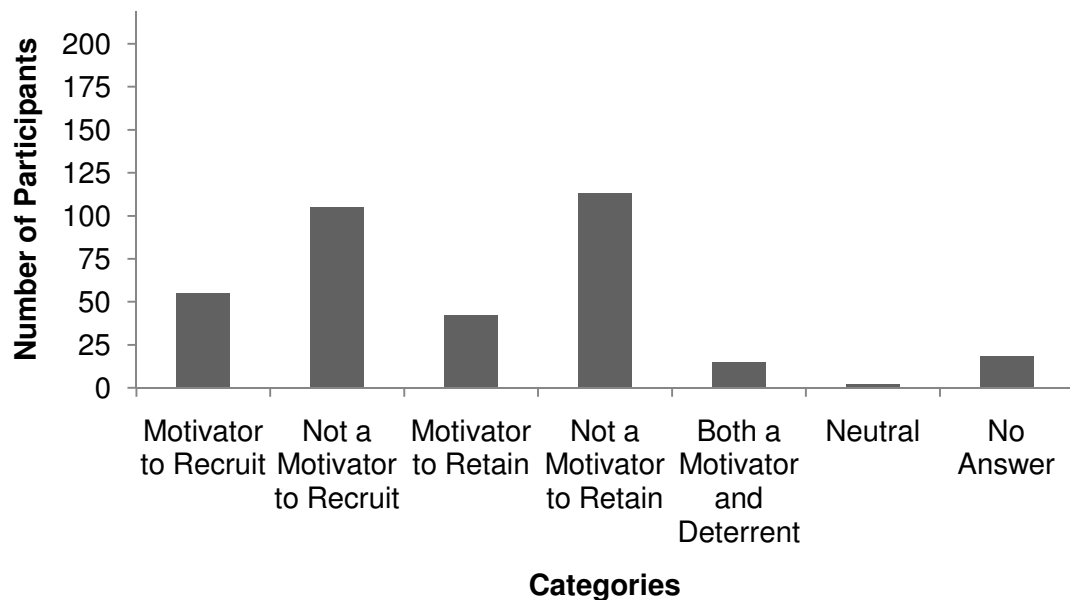


Figure 15. Impact of merit pay as a motivator for recruiting and retaining highly-qualified educators.

Inferential Analysis

Despite the high percentages of Generation Y teachers favoring merit pay, merit pay was rated last among 12 proposals for improving teaching by younger teachers (Viadero, 2009b). Hewlett (as cited in Pink, 2009) compared the Baby Boomer generation to the Generation Y group, and found neither generation rated money as the most urgent need to improve the profession. These two groups choose nonmonetary factors as priorities (Pink, 2009).

A *t*-test was used to determine whether there was a significant difference between two independent samples. The sample used in this *t*-test was a random selection of 50 participants from the original survey group. Group one consisted of 25 educators who had been granted tenure based on state statute. The other group consisted of 25 educators who had not yet been granted tenure based on the same state statute. Applying a point system to the Likert Scale, each response was given a value based on the scale: 5 points for strongly agree, 4 points for agree, 3 points for neutral, 2 points for disagree, 1 point for strongly disagree, and 0 for not applicable or no response. All responses for survey questions 8-18 were entered into a spreadsheet. A *t*-test assuming equal variance was then calculated for each question (see Table 9).

The *t*-test results from this study indicated there was not a significant difference between the beliefs surrounding merit pay of tenured and non-tenured teachers in this study. However, interesting results can be determined from the *t*-test. Forty-eight out of the 50 tenured and non-tenured teachers strongly disagreed they would work for merit pay if based on student test scores. The remaining two participants disagreed. The *p* value for question 10 was $p = 0.16$. Regardless of teacher status, tenured or non-tenured, the

majority of the teachers opposed merit pay tied to test scores. More of the tenured teachers were opposed to working for building-wide performance pay as non-tenured teachers. Four non-tenured teachers strongly agreed or agreed they would work for merit pay based on building-wide criteria compared to only one tenured teacher ($p = 0.07$). Another interesting finding dealt with teacher beliefs regarding whether merit pay was the best option to increase teacher wages (Question 13). Only six teachers selected neutral or agreed while the remaining 44 teachers strongly disagreed or disagreed ($p = 0.49$).

Table 9

t-test: Two Samples Assuming Equal Variance

Question Number	<i>P</i> values
8	0.15
9	0.45
10	0.16
11	0.81
12	0.07
13	0.49
14	0.22
15	0.22
16	0.24
17	0.10
18	0.26

Note: The *t*-test is based on 50 randomly selected surveys to represent 25 tenured and 25 non-tenured teachers. Significance level set at $p < .05$.

Descriptive Analysis—Interviews. Interviews were conducted with 10 educational leaders across the state. Each participant was randomly assigned a pseudonym to ensure anonymity. It is important, however, to understand the expertise and experience of the participants. This demographic information (see Figure 16) was obtained from each participant through establishing a relationship and rapport prior to the start of the interview. To interpret the figure, scan the columns to identify the interview participant’s pseudonym. Then, in the corresponding rows, an X in the box indicates the participant’s experience or expertise. For example, Mr. Taylor has had multiple experiences and expertise in the following categories: current or former educator, administrative experience, education association or union: membership and /or leadership, and legislative experience.

Pseudonym	Mr. Brown	Mr. Clark	Mrs. Davis	Mr. Evans	Mr. Harris	Mr. Jones	Mr. Miller	Mr. Smith	Mr. Taylor	Mrs. Wilson
Current or Former Educator		X	X		X				X	X
Administrative Experience		X							X	X
Local or State School Board Experience						X	X	X		
Education Association/Union: Membership and/or Leadership	X	X	X	X	X				X	X
Business Leadership Experience						X	X	X		X
Legislative Experience (Staff, Senator, Representative)				X			X		X	X

Figure 16. Interview participants provided experience and expertise during the interview process or via electronic mail responses.

Interview question one: What is your view or professional association's view on merit pay? Participants' views on merit pay varied greatly. Four participants: Mr. Brown, Mrs. Davis, Mr. Evans, and Mr. Harris expressed support for a merit pay system if bargained and established locally. These same four individuals declared merit pay should not be tied to test scores alone and should not be based on subjective criteria. Mr. Clark revealed, "My organization opposes merit pay including use of standardized test scores or any other subjective criteria as a method to determine future salary increases." Mr. Smith supported the idea of merit pay whether it was in the business world or the world of education. He responded, "In the corporate world where I live, we pay for results above the norm. I pay my 1500 employees on a bonus system with seven criteria to measure their performance." Mr. Jones did not express an opinion. Three participants: Mr. Miller, Mr. Taylor, and Mrs. Wilson, pointed out merit pay was an issue to be examined closely. They believed a plan had to be developed that was as good as the philosophy sounded. Mrs. Wilson believed there was a need for a clear cut definition of merit pay. This was essential so all the stakeholders involved were on the same page with the same language. Mrs. Wilson elaborated, "Once we have a clear definition, have defined what good is and what criteria will be used, then we can have a conversation."

Two of the participants referred to a position paper on Professional Compensation the MNEA created and approved during the April 2010 Representative Assembly (see Appendix I). The position paper was focused on "a strong, single salary schedule with school districts and employees collaborating to design a professional compensation structure that meets the needs of students, staff, and district officials through a collective

bargaining process” (Missouri NEA Education Transformation Task Force, 2009, p. 1).

Contained within the position paper were the following principles:

To advance these goals, the following principles shall apply:

1. Provide professional beginning salaries with a path for growth through a strong salary schedule.
2. Recognize and reward educators who attain and can demonstrate knowledge and skills that improve their professional proficiency.
3. Recognize and compensate improved teacher practice that is a factor in student learning and other student outcomes.
4. Provide an outline for career growth for educators who want to seek additional responsibility without leaving the classroom or work site.
5. Compensate all education employees on par with the salary, professional growth opportunities and career earnings of comparably prepared professionals.
6. An alternative compensation plan should be considered only after a district/education institution has, over time, implemented a strong salary schedule. (Missouri NEA Education Transformation Task Force, 2009, p. 1)

Interview question two: How have you gained information regarding teachers’ views of merit pay? All the participants had gained information regarding teachers’ views of merit pay through conversations with educators across the state. The educational leaders had read various research reports and articles regarding the topic of merit pay. Five participants interviewed had classroom experience. Mr. Miller worked on legislation in the past regarding a merit pay bill for the St. Louis School District when the district

became unaccredited. The bill would have allotted \$5 million dollars to the district to use if teachers declined tenure in exchange for merit pay. Despite the bill's passage, it was not enacted due to the lack of funding.

Interview question three: What are the advantages of merit pay? Why? The participants shared a variety of advantages of merit pay, except one. Mr. Clark expressed, "I see none. It does nothing to improve education." The most common advantage mentioned of a merit pay system was a reward for effective performance by teachers. Mrs. Davis responded:

Ideally, the advantage of a professional compensation system would recognize the hard work of educators in their efforts to increase student achievement. Ideally, it provides recognition for those educators who continue to improve their skills and knowledge. Ideally, it would hold participants accountable for meeting high standards of performance as measured by negotiated evaluation processes that are objective, fair, and understandable, and predictable.

Another advantage of merit pay mentioned during the interviews was merit pay could serve as a motivational tool for educators to keep working hard and to go above and beyond. Mr. Brown agreed, "The teachers that take the time to go above and beyond what is expected would have the opportunity to earn more money."

Keeping highly-qualified teachers in the classroom was an advantaged acknowledged by three participants. Mrs. Davis, Mr. Evans, and Mr. Taylor agreed merit pay was essential to keep highly-qualified teachers in the classroom and by compensating

teachers at a higher rate, many would remain in the classroom. Mr. Evans insisted:

Definitions of “merit pay” vary to the extent that a professional compensation system is styled as “merit pay” and...rewards educators who attain and can demonstrate knowledge and skills that improve their professional proficiency...recognizes and compensates improved teacher practice that is a factor in student learning and other student outcomes, and provides an outline for career growth for educators who want to seek additional responsibility without leaving the classroom or work site. Such a system could be a legitimate compensation plan for recruiting, retaining, and rewarding high-quality educators.

One participant with personal experience of applying merit pay in the business world, believed merit pay should not just be awarded to individual teachers but school-wide when the expected results were attained.

Interview question four: What are the disadvantages of merit pay? Why? Many disadvantages were identified by the participants. The main disadvantage identified by six of the 10 participants was competition would occur as a result of merit pay. Teachers would no longer collaborate or share best practices. Mr. Brown echoed these thoughts, “It also has the possibility of creating competition among teachers, thereby eliminating the willingness of teachers to share best practices.”

The main problem associated with the issue of merit pay is how to determine what is merit and how to evaluate it. Four participants indicated creating the system would be difficult and time consuming. One participant argued it needed to be fair and accepted by all involved. Mrs. Wilson worried, “It could result in a rural school district verses city

school district with the way the foundation grant provision is written. This could lead to conversations of school consolidation of smaller districts.”

Participants with educational experience identified a student’s assignment to teachers as a major concern. Educators have little control over which students are placed in their classroom nor do they have any control over outside factors which contribute to the life of a child. Mr. Clark expressed:

My class roster is not at my discretion. I don’t have the ability to choose my students, and I cannot guarantee that my parents see education as important as I do. I teach every year to the best of my ability. Some years I would get merit pay by how my students succeed, others I would not.

Several participants feared a merit pay plan in Missouri would limit the number of highly-qualified teachers in the profession. Mr. Brown emphasized, “I think merit pay will drive some people from the teaching profession. The money that goes into a merit pay program will mean there is less money for other educational programs that are important for students.”

Additional concerns included evaluator bias and merit pay plans only including teachers instead of all education personnel in a school building. Mrs. Wilson related, “The system is only as good as the evaluator. They will need training.” One participant specified merit pay imposed by those at a distance such as legislators, verses a plan created by local groups working together, would be a disadvantage.

Interview question five: How would merit pay affect the recruitment of teachers? Explain. Several of the participants believed merit pay would help with the recruitment of teachers. Participants suggested individuals who were competitive and

liked to be rewarded would like merit pay. Those districts with the most money would have the ability to pick from the best and brightest candidates when it came to hiring for the next school year. Mrs. Davis replied:

Ideally, a district would bargain professional compensation that would be competitive to neighboring districts in the area and would attract highly-qualified educators that would be interested in not only the beginning salary, but the district's ability and desire to continue to improve the salaries of educators in the district.

Another participant, Mr. Jones, thought it might possibly attract individuals to the teaching profession who would not otherwise consider it because of the pay structure. However, Mr. Brown and Mr. Evans disagreed. Mr. Brown did not think merit pay would increase the number of teachers in shortage areas, especially in the areas of special education and industrial technology. Mr. Evans insisted there first needed to be a strong salary schedule in place, and then a merit pay plan could be designed. He continued, "A good professional compensation plan that included compensation for hard-to-staff or hard-to-serve assignments could help recruit teachers to meet those needs".

Opposed to merit pay, Mr. Clark responded, "I think it would deter new teachers from joining the field. If I knew my pay was directly tied to my students' scores, I would not want to go into the profession unless I was guaranteed the best students."

Interview question six: How would merit pay affect the retention of highly-effective teachers? Explain. Opinions varied on the topic of retention of highly-effective teachers. Several participants thought merit pay would eliminate the teachers who were not highly-qualified. Several other participants believed teachers who were considered

average would work harder, learn from others, and become highly-effective later in their careers. Yet, Mr. Taylor worried some teachers, who have the potential of becoming great, will become discouraged and leave the profession before reaching their potential.

One participant suggested a district which bargained a plan recognizing educators' achievements and growth would be able to retain staff. Mr. Jones explained, "In theory, highly-qualified teachers would be better compensated, and that would lead to better retention." Mr. Evans saw this issue as both an asset and a detriment:

If the plan provides an outline for career growth for educators who want to seek additional responsibility without leaving the classroom or work site, it could help retain more effective teachers in the classroom, rather than forcing them to move to administrative position to seek higher income. On the other hand, if the plan is competitive rather than collaborative, and fusses on student scores, it will not encourage educators to seek additional responsibility by helping other educators.

However, Mr. Brown wanted a definition for the term, highly-effective. He believed without a universal definition of merit pay, there could not be a conversation, or better yet, implementation of a plan.

Mr. Clark knew many teachers who would retire early if merit pay was initiated in Missouri. He concluded, "Many teachers I know who are nearing retirement have stated that they will retire if merit pay goes through. They are great teachers but would be lost early because of this type of earnings system."

Interview question seven: What do you see as the future of merit pay in Missouri? The majority of participants believed a merit pay system would eventually be implemented in Missouri. Several of the participants blamed the legislature for pushing

merit pay as a way to reform education. Mr. Brown acknowledged, “I think the legislature will use this as a way to say that they are reforming education in Missouri, but the reality will be that very few, if any, districts will actually establish a merit system.” Another participant, Mr. Evans, agreed the legislature may mandate districts to revise their district pay plans and force them to include a merit pay component; however, funding is unavailable at the state level. One participant agreed the legislators wanted merit pay but had not done the research to understand the program. Mrs. Wilson indicated bills would be filed in January 2011 as the next legislative session began. She speculated, “Something will happen this year.”

Since funding is an issue at the state level, Mr. Taylor revealed, “With *Race to the Top*, there is a push for merit pay. Missouri would want to take advantage of the many grants and moneys available.” Mr. Miller responded, “Additional funding will be needed to implement merit pay in Missouri, but the money is not available right now.”

Mr. Smith noted, “Professional associations have a lot of power and influence. Merit pay holds people accountable, and they have to agree to be accountable.” Mrs. Davis, a former educator and association leader, replied:

I believe those in positions of power in this state have the belief that public schools should run more like a businesses and don’t realize the challenges that educators face. They don’t understand that we’re a public school, not a business, and children are our main concern!

Interview question eight: How do you respond to the opponents/proponents of merit pay, based on your views? Educational leaders interviewed insisted listening and asking questions were ways to learn more, especially from those who oppose their views.

Mr. Taylor acknowledged, “Anything we can do to motivate or retain teachers, we need to look at. We need to look at it with an open mind and study it carefully.” Mr. Smith added, “I would respond with questions and more questions.”

Merit pay is seen as another method for education reform. Mrs. Davis yielded, “Unfortunately, I believe that many of those in positions to make the decisions are not willing to listen to educators. They believe that they think they know better than those who spend their days in the classrooms and schools.” Another participant, Mr. Clark, deduced, “Merit pay is another idea that is trying to fix education. But if you truly look at the success of students, we are doing a great job. Let teachers teach, and we will give you great citizens for tomorrow.” Mr. Brown asserted, “Merit pay can work in the private sector where business can motivate the sales or production of a product. Teachers are in the people business, and it is much more difficult to measure increased production of a teacher.”

Interview question nine: How should a merit pay plan be written in Missouri?

Who should participate in this task? Several participants agreed a merit pay plan should be written at the local level with all stakeholders involved. Stakeholders were identified as students, teachers, administrators, legislators, policy makers, and community members. Mr. Smith advocated, “It needs to consist of a coalition of educators, thoughtful people. Those that will listen and not just represent a union view. Legislators need to be brought in, too...the leaders not the puppets.” Mr. Evan insisted, “Professional compensation plans should be locally-bargained...we oppose state mandates that will force districts to adopt merit pay provisions that are not agreed to locally.” Mr. Clark and Mr. Harris agreed merit pay should be established locally rather than statewide.

Mr. Miller suggested merit pay should be implemented into failing schools and districts first, “It must be voluntary for schools and teachers. We have to start small and then expand the program.” Mr. Taylor agreed, “It must be voluntary. If a district wants to try it, they should be allowed to.”

Interview question 10: What components should be part of the merit pay plan?

What should not be part of the plan? Educational leaders had multiple responses for this question. Comments frequently included: the graduation rate, objective data, measureable student growth, measureable performance component, professional development activities, and goals set by teachers. Mr. Miller pointed out, “The plan needs to be black and white.” Mr. Taylor revealed, “The secret to merit pay should be objective data: things that a teacher does or doesn’t do.” Mr. Brown described what a merit pay system should look like:

The best merit pay systems that I have seen have all been based on individual goals that teachers establish with their administrator. How well they accomplish these goals and the process they use to successfully complete a goal is how they get judged.

One education association, the MNEA, created a position paper outlining the required components of a merit pay plan (see Appendix I). One participant believed a merit pay plan should be like the Career Ladder program; however, Mr. Harris insisted a merit pay system be available to all teachers, unlike the Career Ladder program in which only teachers who had taught five or more years in Missouri and were tenured could participate.

Most of the participants agreed a merit pay system should not be based on one test score. Mr. Taylor agreed, “Yes, there should be a performance component, but most of the plan should be measurable. If you do this, and the district rewards you.” Mr. Miller agreed, “One exam is too much emphasis. We do not want teachers teaching to the test.” Mr. Clark, opposed to merit pay, did not provide a list of components.

Interview question 11: In your opinion, what are alternatives to merit pay?

Participants mentioned several alternatives to merit pay including a Career Ladder plan, creating a strong base pay, and bargained contracts. Mrs. Davis suggested an alternative to merit pay was “a locally bargained, strong and competitive, sustainable contract.” Mr. Evans suggested a strong, single salary schedule as an effective compensation plan, while Mr. Clark believed, “Pay teachers for the jobs they currently do at a wage that will recruit and maintain good teachers.”

One alternative suggested again by multiple participants was to implement a Career Ladder system. Mr. Taylor affirmed, “Career Ladder was fair.” Through this program teachers were paid additional funds for completing additional tasks. However, Mrs. Wilson disagreed:

We don’t need to pay people for collecting tickets at a ballgame. We do need to raise teacher salaries across the state by changing the state statute. The value of a teacher should be equal to that of a legislator’s salary of \$31,000.

The minimum salary in Missouri was \$25,000 for the 2010-2011 school year and will remain until Missouri Statute §163:172 is revised (State Aid, 2009).

Two participants explained there were no other options besides implementing a merit pay system. Mr. Miller argued, “We can’t keep throwing money at a situation that

isn't working. If it isn't working now, don't throw more money to the same teacher." Mr. Jones agreed with Mr. Miller and indicated the only other option to merit pay was the "status quo" which was unacceptable.

Interview question 12: What other comments regarding merit pay would you like to share? Mr. Jones concluded, "If merit pay would truly impact education in a positive way, I would be supportive. No doubt additional funding would be required, and that is unlikely in our current environment," Another participant, Mr. Miller, responded, "We have some failing schools, and something needs to be done. Desperate times equal desperate measures." He continued, "Tenure is out-dated, ineffective; we need to reduce the need or desire for tenure." Mr. Taylor summarized, "I have three final statements: merit pay hurts collaboration, it puts pressure on administration, and if you do these things, you get the money. It can't solely be based on student performance."

Opposed to merit pay, Mr. Clark reiterated, "Merit pay will not fix education! Letting good teachers teach will fix education." Mrs. Wilson believed education groups in Missouri needed to unite to send a resonating and powerful voice to the legislature. By doing so, their influence could guide upcoming legislation; otherwise, the lack of collaboration and team work would help those who support merit pay as they pit one group against the other.

Summary

Opinions and perceptions of merit pay varied greatly among participants of this study. The research collected through interviews and surveys of Missouri educators indicated the majority of teachers and educational leaders opposed merit pay. Educators indicated teacher salaries were low, but other options should be explored rather than a

merit pay system. If a merit pay system was to be implemented, teachers and educational leaders want to be involved in the design, implementation, and evaluation of such a program. Teachers emphasized multiple criteria need to be examined instead of just test scores to determine compensation for educators. There was no significant difference regarding thoughts on merit pay between tenured and non-tenured teachers.

Educational leaders pointed out merit pay needs to be examined closely. A working definition needed to be determined to allow all participants to be on the same page with the same understanding. Many education leaders believed merit pay will become a reality in Missouri. Several educational leaders felt teachers needed to help craft legislation articulating what they would be willing to work for, rather than stand on the sidelines opposed to merit pay.

Teachers are rapidly leaving the profession due to salary, working conditions, and lack of respect; therefore, something needs to be done to recruit and retain highly-effective teachers. Many options are available in terms of compensating Missouri educators, and these alternatives included increasing the state minimum starting salary and developing a Career Ladder format similar to the one phased-out in 2010.

The overall concern was teachers are leaving the field of education for higher paying jobs, while young people are choosing other career paths. The end result will affect future citizens as highly-qualified teachers are no longer standing in the front of the classroom. Whether merit pay is implemented or another alternative selected, the participants agreed teachers want higher salaries but not through a merit pay system.

In Chapter Five the findings of this study were discussed. As a result of the study, conclusions about the perceptions of educators and education leaders on the topic of

merit pay were identified. The conclusions were assembled from the review of literature, surveys, and interviews. Additionally, implications for practice and recommendations were suggested in Chapter Five.

Chapter Five: Discussion, Conclusions, and Implications

Merit pay continues to be examined by legislators, teachers, professional organizations, and community members as a possible avenue to compensate educators. Due to the current economic crisis, public school districts are forced to make dramatic cuts in personnel and programs; however, districts must continue to meet federal and state mandates to increase student achievement (Adams, Heywood, & Rothstein, 2009; Associated Press, 2010b; Crump, 2010; Essig, 2009; MODESE, 2009; Williams, Oliff, Singham, & Johnson, 2010). Researchers have identified teacher quality influences student achievement (Danielson, 2009; Goe et al., 2008; Marzano, 2007; Marzano, Pickering, & Pollock, 2004; Rothstein, 2009; Schmoker, 2006; Stronge, 2002; Stronge, 2007; Stronge & Hindman, 2006). Therefore, many believe the traditional salary schedule, which has been the predominate method of paying teachers for many years, is outdated and ineffective (Gratz, 2009a; Missouri State Board of Education Meeting, 2009).

The primary purpose of this study was to examine the perceptions of educators regarding the merit pay system. This group included 219 certified public school teachers, superintendents, assistant superintendents, principals, assistant principals, and directors in the state of Missouri. The perceptions of state-level educational leaders and professional organization leaders were also examined in regard to merit pay. This group included 10 state educational leaders from professional organizations in Missouri (MAFT, MSTA, and MNEA), state board members, and legislators. The secondary purpose of this study was to examine the perceptions of educators on the impact of merit pay on recruiting and retaining highly-qualified teachers.

This mixed-methods design study included surveying teachers and interviewing 10 state educational leaders. Surveys were distributed to 996 educators with a return rate of 22%. The survey, which was field-tested and revised, consisted of 25 questions (see Appendix A). Data collected from the surveys included demographic information on each participant. Educators responded to statements about merit pay and provided a response using a Likert Scale: strongly agree, agree, neutral, disagree, and strongly disagree. Additional questions allowed participants to select answers they agreed with and write personal responses. Open-ended questions allowed the participants to include opinions or thoughts regarding merit pay. Following the collection of data, each participant was assigned a random number to ensure confidentiality. A *t*-test was conducted to compare the responses of tenured teachers to non-tenured teachers to determine if there was a difference in the opinions of merit pay between these two groups.

Interviews (see Appendix B) were conducted with 10 state-level educational leaders representing teacher organizations, legislators, and the state school board. All three of these groups had been involved in discussions regarding the topic of merit pay. The first draft of the interview consisted of 10 questions. The interview questions were refined and amended after review by the dissertation committee consisting of professional educators. The final interview consisted of 12 open-ended questions to gather perceptions and opinions of educational leaders across the state. Six of the interviews were conducted via electronic mail, and four of the interviews were conducted over the phone. Each participant was assigned a pseudonym to insure confidentiality.

In Chapter Five, each research question was answered based on the triangulation of the data collected through the literature review, surveys, and interviews. The results

included narrative text from participant responses from the open-ended questions. Perceptions of state-level educational leaders expressed during the interviews were presented. Conclusions from the study were listed in Chapter Five with implications and questions regarding the future of merit pay in Missouri. Chapter Five concluded with recommendations for future discussions and actions pertaining to the topic of merit pay.

Research Questions

The following questions guided this study:

1. What are the perceptions of teachers toward merit pay?
2. What are the perceptions of school administrators toward merit pay for teachers?
3. What are the perceptions of state education leaders toward merit pay for teachers?
4. What are the perceptions of professional organization presidents and legislative directors towards merit pay for teachers?
5. What are the perceptions of educators on the impact of merit pay on recruiting future educators?
6. What are the perceptions of educators on the impact of merit pay on retaining highly-qualified teachers?

Discussion of Findings

Research question one: What are the perceptions of teachers toward merit pay? The merit pay system has much opposition (Gratz, 2009a; Kohn, 2003; NEA, 2002a). This study found 70% of the 219 educators surveyed believed the current salary structure was adequate. Currently, 95% of all school districts across the United States

utilize the traditional salary schedule which indicates this method is widely supported. The traditional salary schedule is based on experience and training (Hess, 2010; Hurley, 1985). Teachers move vertically (down) the schedule with years of experience and horizontally (across) the schedule as they obtain hours of professional development or additional degrees (Hurley, 1985). Participant 10 stated, “Teachers aren’t the type of people who are motivated by money. If we were, we wouldn’t be teachers. I could make a lot of money in another field.” This was reiterated by Ramirez (2009) who suggested good teaching is not about money but about a sense of calling.

In national surveys, parents expressed teachers needed increased compensation for their jobs. Parents believed that teachers should have some accountability in order to earn a higher salary with some parents suggesting test scores were the way to evaluate teacher effectiveness. Other parents believed increasing the base salary was enough.

When asked about tying merit pay to test scores, a high percentage of participants were opposed to the idea; 96% of the educators would not work for merit pay if tied to test scores. One participant responded:

To base pay on the performance of a child on one test is completely inappropriate. If a child decides to do his very best on that particular day [it] will determine your career and livelihood. Outside factors need to be considered with each child.

The NEA agreed with educators as many expressed concerns: pressures to teach-to-the test, a focus only on students near the mandated proficiency level, and ignoring other students deemed unable to reach proficient or advanced on state tests (NEA Department of Collective Bargaining and Member Advocacy, 2008a). Survey Participant 204 explained, “Teachers are already overworked. How much more can I do? Test scores? I

work with at risk students. They're not going to score well, because they don't care about grades."

Money can be a motivational tool for some people, as well as recognition, achievement, advancement, and interesting work (Herzberg et al., 1959). However, merit pay could be either a motivator or not a motivator based on individual work ethic. Herzberg et al. (1959) believed many times salaries were obtained grudgingly, and this was expressed by teachers who had once participated in the Career Ladder program and are now still expected to perform many of the task without pay. Deci et al. (1999) and Pink (2009) ascertained the idea that money used as an external reward could cause a person to lose intrinsic interest and could often illicit more negative behavior and less desired behavior.

However, the NEA has believed there are justifiable reasons to pay bonuses to teachers: national board certification, teachers who assume additional responsibilities, and for teachers serving in hard-to-staff schools (NEA Collective Bargaining and Member Advocacy, 2008b). This was affirmed as a method to earn additional compensation in ProComp. Additionally, some states have rewarded teachers with supplementary income for achieving national certification. Another organization, the MSTA, has opposed merit pay (MSTA, 2010). The use of standardized test scores or other subjective criteria as a method to determine salary increases are not acceptable (MSTA, 2010). Participant 129 exclaimed:

The *worth* of a teacher cannot be reduced to a score. We are not stamping patterns, we are not cutting cookies, or working with machines. Children are

people with their own experiences, goals, cultures, and values. They each cannot be reduced to a score!

Survey results revealed 70% of those participating disagreed or strongly disagreed to work for merit pay based on student performance. Participants pointed to many factors regarding disadvantages of merit pay. The most common disadvantage identified by the participants was school population or school makeup. Educators were extremely concerned about the factors in children's lives which were out of their control, such as socio-economic status, home life, race, parent involvement, and education emphasized at home. Research by Baron (2004) highlighted that same belief of outside factors affecting the education of students. Participant 113 shared:

Teachers have influence on students only in the classroom. The home environment, peer pressures, disagreements with friends, and parents all have a strong influence on the students before they even enter the classroom. Adequate school books, electronic equipment, and materials to teach students are needed for students to learn and grow.

Participant 116 expressed her concerns:

When students come into your classroom, a teacher works very hard to educate each student. Some students come in with a great deal of knowledge and others with no or very little knowledge or language. We work very hard to reach all levels of students while at school. However, we also have to take into account the home life of students. Students with a stable home life with parents that care about education tend to do better than students with instability and/or parents that do/don't care about education.

However, the TIF grants emphasized a compensation system which rewards educators for increases in student achievement regardless of outside factors. Teachers and building-wide staff members could earn bonuses based on student achievement growth.

Additional issues impacting teachers included: class size, student assignment, and course load. Ravitch (2010b) pointed out children come to school at different levels with diverse backgrounds. Students are not always randomly assigned to teachers, as administrators occasionally assign the more difficult students to teachers who have the ability to handle them (Amrein-Beardsley, 2009). Parents may also request particular teachers based on the reputation the teachers have in the school community (Amrein-Beardsley, 2009). Participant 115 stated:

There are so many other factors that affect student education other than the teacher. An effective teacher may not have a positive impact on every single student, especially those students who are not taught to value education from the home. Teachers and students are individuals and have different types of personalities, learning styles, and teaching styles. Assessing all teachers according to a defined set of criteria is unfair to those students who learn differently than the chosen teaching style. Teachers can do all they can to reach every student, but there will be some students which will intentionally perform poorly in effort to hurt the “performance” of the teachers.

Many believed merit pay encouraged competition rather than collaboration among teachers, schools, and districts. The participants identified competition between teachers and the lack of collaboration as the second and third most common disadvantage of merit pay. This was verified by the belief of the NEA which has argued merit pay causes

distrust among colleagues, failure to share ideas, and forces teachers to compete with each other rather than cooperate (Ritter & Jensen, 2010).

Teacher collaboration has been identified as a strategy to improve student achievement. Participant 98 suggested collaboration would be difficult, “[Merit pay] fosters negative competition between teachers and penalizes teachers who work with at risk student populations.” Participant 83 affirmed, “I think merit pay would be a disadvantage as different students test in different ways. Some years would naturally be higher than others, and this would be hard to regulate.” Participant 95 acknowledged:

It would create a competitive environment instead of collaboration. Teachers would compete for the best classes and students. They would be less willing to share units developed for fear of others getting their reward. I think the students will suffer due to this competition.

One interview participant suggested all employees in a building should be rewarded with merit pay if school-wide increases in student achievement were achieved. These same thoughts were shared by Ravitch (2010b) who agreed all educators in a building should be rewarded through a school-wide bonus program. This was one element of the successful program in Houston, Texas. In this study, however, 77% of the educators surveyed disagreed and contended they would not work for merit pay if tied to building wide performance. In contrast with these educators, the AFT has determined a well-designed compensation system should be voluntary, school wide, and promote a collaborative work environment (AFT, 2010).

Educators want to be included in the development and evaluation of a merit pay plan should Missouri move in that direction. Teachers, administrators, and professional

organizations were the top individuals chosen to develop, monitor, and evaluate a merit pay system. Stakeholder participation has been identified as one of the strengths of ProComp in Denver. Teachers contributed the success of ProComp to active involvement of union members, community members, and taxpayers who voted for the tax increase to fund the plan. Missouri educators felt a merit pay plan should be tied directly to portfolios, principal evaluations, and peer evaluations. Yet, many educators expressed concerns about principal evaluations being unfair and biased. This issue was avoided in a plan created by the Midway School District in which the plan was based on 40% evaluation, 40% teacher development plan, and 20% on parent satisfaction (Ritter & Jensen, 2010). Criteria would need to be established for portfolios with components containing student work samples and professional work of educators. Based on the research collected, it is assumed teachers would also want to be part of the development of this evaluation system.

The overall idea of merit pay was not well received by Missouri educators with 90% of those surveyed agreeing merit pay was not the best option to increase teacher wages. Teachers are somewhat concerned about their districts moving to merit pay.

Participant 118 responded:

If the system is based solely on test scores, it will be unfair to teachers which will lead to fear, distrust, lower retention rates of teachers, fewer teachers entering the profession, etc. A teacher may be highly-qualified and be teaching to their highest potential but may have a set of students who score low on tests not because of the teacher but because of outside factors, such as lack of intrinsic motivators, family situation, learning disabilities, etc.

It was evident in the teacher responses, emotions ran high in regard to the idea of merit pay. Participant 196 exclaimed, “Let’s do a merit pay system with parents’ jobs. Their pay would reflect their own child’s performance in school. Now, that’s an idea that would work!”

Research question two: What are the perceptions of school administrators toward merit pay for teachers? Unfortunately, only four of the 219 participants were administrators in this survey. The group consisted of an associate superintendent, a director, a middle school principal, and an elementary assistant principal. This small group was made up of three females and one male who were employed by districts with more than 3,000 students. Three of the administrators were previously teachers granted tenure.

Two of the four administrators believed the current salary structure was adequate and would not consider working in a district which offered merit pay. All four of the administrators would not work for merit pay if tied to test scores, performance of students in classrooms, or school-wide performance. Not one thought merit pay was the best option to increase wages or a fair way to measure a teacher’s performance. Two of the four administrators were concerned the district they currently were employed in would move to a merit pay system during their career, while two were not concerned.

Two of the four administrators, or 50%, contended their beliefs were influenced by the association to which they belong. This was comparable to the teacher responses in which 52% revealed they were influenced by their association. The majority of the participants in this study, both teachers and administrators, belonged to one of three groups: MST A, MNEA, or NASSP.

All four agreed or strongly agreed merit pay would impact the recruiting of educators, while only three agreed or strongly agreed merit pay would impact the retention of highly-qualified teachers. Participant 38 pointed out, “Research has shown there isn’t conclusive evidence that merit pay motivates highly-qualified educators.”

Research question three: What are the perceptions of state education leaders toward merit pay for teachers? For this study, the following individuals participated in the interviews and were classified as state-level educational leaders: two Missouri state board of education members and three current legislators. The interview participants had varying opinions of merit pay, how it should be developed, and how it should be implemented into the state education plan.

One participant, Mr. Smith, supported the idea of merit pay, whether it was in the business world or the world of education. He responded, “In the corporate world where I live, we pay for results above the norm.” Through his personal experience, he believed merit pay was a workable system. Mr. Jones acknowledged, “If merit pay would truly impact education in a positive way, I would be supportive.” Agreeing with the teachers, several state-level leaders acknowledged the issue had to be examined closely. Mrs. Wilson indicated there was a need for a clear-cut definition of merit pay prior to any conversations so all stakeholders were on the same page with the same language.

At the national level, President Obama has presented his views of merit pay and is supportive of compensating highly-qualified teachers. The Secretary of Education, Duncan, voiced his support of a merit pay system. Through increasing the budget for TIF grants, more districts will be eligible for money to focus on teacher salaries and increases in student achievement.

All of the educational leaders interviewed gained information regarding teachers' views of merit pay through conversations with educators across the state. These educational leaders met with constituents on a regular basis and have heard many concerns regarding educational issues with merit pay being one of the most common topics. These leaders have examined many resources regarding the topic of merit pay including articles, reports, and studies written locally, regionally, and nationally. The participants believed they were well informed on the topic of merit pay. In contrast, association leaders did not believe the state-level educational leaders were informed well enough to make decisions on this topic.

Echoing concerns of teachers regarding evaluator bias and tying merit pay to test scores, Mrs. Wilson pointed out, "The system is only as good as the evaluator. They will need training." Mr. Taylor, who is a previous administrator, was concerned about the added stress administrators would feel when it came to fair and unbiased evaluations. He worried, "merit pay...it puts pressure on administration. It can't solely be based on student performance." Teachers surveyed feared biased and unfair evaluations.

The current financial outlook for school district budgets does not look favorable. Missouri Governor Nixon cut millions of dollars from the 2010-2011 fiscal budget (Associated Press, 2010b; Essig, 2009). Since funding is an issue at the state level, Mr. Taylor concluded, "Missouri will want to take advantage of the many grants and moneys available with *Race to the Top*." Mr. Miller confirmed, "Additional funding will be needed to implement merit pay in Missouri, but the money is not available right now."

Creating a merit pay plan would take time, energy, patience, and people willing to listen. Teachers agreed with the state-level leaders that all stakeholders needed to be at

the table. Mrs. Wilson suggested the teacher organizations (MSTA, NEA, and AFT) work jointly. She continued, “Advocacy groups working together, teacher groups. We have to be the ones to speak out, because it affects us.” ProComp was instrumental in gaining taxpayer support to fund a merit pay system by encouraging participation during the development, design, and implementation of the plan. Not only did the creators of ProComp ask for community input, unions were recognized as experts and asked to be involved.

As the state begins to create a plan for merit pay, there were several ideas education leaders suggested. Mr. Miller believed the plan needs to be black and white. Several participants wanted a clear plan identifying what teachers could do and could not do. State leaders agreed merit pay should be implemented into failing schools and allow districts to volunteer to participate in the merit pay system. Mr. Miller affirmed, “It must be voluntary for schools and teachers. We have to start small and then expand the program.” Mr. Taylor agreed, “If a district wants to try it, they should be allowed to.”

Legislation regarding merit pay surfaced when the St. Louis School District became unaccredited. Several of the interview participants believed the issue of merit pay would re-emerge this legislation session. The belief is some kind of action is inevitable in the foreseeable future. Legislation in Missouri may follow other states that have already examined this issue. Florida, Georgia, Indiana, as well as a multitude of other states, have either defeated merit pay plans or implemented them.

Another alternative suggested by multiple participants was to implement a Career Ladder system like Missouri had until 2010 when it was eliminated. Missouri educators earned extra pay through the Career Ladder program by completing required tasks with

benefits ranging from \$1500-\$5000 (MODESE, 2009). However, state leaders were divided on the idea of recreating a Career Ladder format or creating something new. While a few believed Career Ladder was fair and clear cut, others believed some of the criteria was not worthy of extra compensation. One opponent of the traditional salary schedule and the Career Ladder model concluded, “We can’t keep throwing money at a situation that isn’t working.”

The recruitment and retention of highly-qualified teachers is a must for the state of Missouri. State-level leaders agreed something needs to change in the way teachers are compensated. However, determining the correct method is the dilemma. There will be more discussion on the issue of merit pay by education leaders in the future. Mrs. Wilson concluded:

Education needs to be placed higher on our agenda. This is the next generation. We need to teach them to think; they need to make good decisions. They are our future leaders, and education for the next generation needs to be our focus!

Research question four: What are the perceptions of professional organization presidents and legislative directors towards merit pay for teachers?

The following participated in the interviews and were classified as professional organization leaders for this study: association presidents for each of the professional organizations in Missouri (AFT, MNEA, and MSTA), and two legislative directors representing two education associations.

Four of the five participants in this group supported higher salaries for educators, but if merit pay was to be incorporated it had to be bargained and established locally. These same individuals declared merit pay should not be tied to test scores alone and

should not be based on subjective criteria. Mr. Clark expressed opposition to merit pay including the use of standardized test scores to determine future salary increases. Two of leaders from one organization referred to a position paper on professional compensation their association created in 2010 (see Appendix I). The first issue the MNEA focused on was the need for districts to implement a strong salary schedule. Once this was accomplished, an alternative compensation plan could be considered. One of the guiding principles of the position paper was, “Districts need to provide professional beginning salaries with a path for growth through a strong salary schedule.” (Missouri NEA Education Transformation Task Force, 2009, p. 1). This was reiterated as the majority (70%) of the teachers surveyed agreed that the current pay structure was adequate.

Based on their leadership roles in associations, these leaders have traveled around the state discussing with members current issues facing education. Reading various research reports and articles regarding the topic of merit pay has provided education leaders with additional information. The participants related a variety of advantages of merit pay except one. Mr. Clark saw no advantages. The most common advantage acknowledged was rewarding the effective performance of teachers, which in turn, could serve as a motivational tool for educators to keep working hard and to go above and beyond. Mrs. Davis responded, “Ideally, the advantage of a professional compensation system would recognize the hard work of educators in their efforts to increase student achievement. Ideally, it provides recognition for those educators who continue to improve their skills and knowledge.” Mr. Brown agreed, “The teachers that take the time to go above and beyond what is expected would have the opportunity to earn more money.”

Many disadvantages were identified by the participants. The main disadvantage identified was competition resulting from merit pay. Teachers would no longer collaborate or share best practices. Mr. Brown echoed these thoughts, “It also has the possibility of... eliminating the willingness of teachers to share best practices.” The NEA and the MSTA opposed wages tied to performance evaluations of employees (MSTA, 2010; NEA Department of Collective Bargaining and Member Advocacy, 2008a). This aligned with responses by the educators surveyed and some of the state-level educational leaders interviewed. Since evaluations are highly subjective, connecting monetary rewards to performance evaluations is inappropriate (NEA Department of Collective Bargaining and Member Advocacy, 2008a). Rothstein (2008) noted, “Supervisory evaluations may be tainted by favoritism, bias, inflation...supervisory evaluations are flawed tools for objective evaluation of performance” (p. 67). Mr. Brown believed differently:

The best merit pay systems that I have seen have all been based on individual goals that teachers establish with their administrator. How well they accomplish these goals and the process they use to successfully complete a goal is how they get judged.

Keeping highly-qualified teachers in the classroom was an advantaged stated by multiple participants. They agreed it was essential to keep highly-qualified teachers in the classroom, and by compensating them more the teachers would remain in the classroom instead of leaving the profession or moving into administration. Mr. Evans reaffirmed the need for recruiting, retaining, and rewarding highly-qualified educators, and a merit pay system would be a legitimate compensation plan to “provide an outline for career growth

for educators who want to seek additional responsibility without leaving the classroom or work site.”

Participants mentioned several alternatives to merit pay including a Career Ladder plan, creating a strong base pay, and bargained contracts. Mrs. Davis identified an alternative to merit pay was, “a locally bargained, strong and competitive, sustainable contract.” Mr. Evans suggested a strong, salary schedule as an effective compensation plan. Mr. Clark added, “Pay teachers for the jobs they currently do at a wage that will recruit and maintain good teachers.” Contrary to the beliefs of state-level educational leaders, association leaders believed merit pay should be created at the local level and not statewide.

Participants with education experience stated students assigned to teachers were a major concern. Educators have little control over which student are placed in their classroom nor any control over outside factors which contribute to the life of a child. Mr. Clark expressed, “My class roster is not at my discretion. I don’t have the ability to choose my students...Some years I would get merit pay by how my students succeed, others I would not.”

Several of the participants believed merit pay will help with the recruitment of teachers. Participants acknowledged some teachers would like merit pay, while districts with the most money will have the ability to hire the best. Mrs. Davis replied, “A district would bargain professional compensation that would be competitive to neighboring districts in the area and would attract highly-qualified educators.” Another participant worried about rural communities and their quest to hire teachers if other districts were able to offer more competitive salaries.

Several participants were fearful a merit pay plan in Missouri would affect the availability of highly-qualified teachers. Mr. Brown suggested, “I think merit pay will drive some people from the teaching profession.” Mr. Evans insisted there first needed to be a strong salary schedule in place before a merit pay plan could be designed. Opposed to merit pay, Mr. Brown argued, “I think it would deter new teachers from joining the field. If I knew my pay was directly tied to my student’s scores I would not want to go into the profession unless I was guaranteed the best students.”

Many of the participants believed there is a future for merit pay in Missouri. Many of the participants referred to the legislators as the ones pushing merit pay as a way to reform education. Mr. Brown acknowledged, “I think the legislature will use this as a way to say that they are reforming education in Missouri.” Others agreed the legislature may mandate districts to revise their district pay plans and force them to include a merit pay component. One participant suggested the legislators who wanted merit pay had not done the research to understand the program. This contradicts the feelings expressed by the state-level educational leaders who believed they were well educated and informed on the topic. Additionally, several of the state-level leaders interviewed were former educators.

Merit pay is seen as another method to reform education. Mr. Brown, criticized, “Unfortunately, I believe that many of those in positions to make the decisions are not willing to listen to educators....they think they know better than those who spend their days in the classrooms and schools.” He continued, “Merit pay can work in the private sector where business can motivate the sales or production of a product. Teachers are in

the people business, and that is much more difficult to measure increased production of a teacher.”

Research question five: What are the perceptions of educators on the impact of merit pay on recruiting future educators? Merit pay would impact the recruitment of future educators according to those surveyed. Over 80% strongly agreed or agreed merit pay would have an impact. Additionally, several of those interviewed also agreed merit pay would impact recruiting. However, many educators surveyed believed merit pay would negatively affect recruitment efforts.

Teacher salaries and the long term earning potential of teachers have been compared to other professions, and teacher salaries were found to be 15% lower causing many teachers to leave the profession to earn higher salaries (NEA Department of Collective Bargaining and Member Advocacy, 2008a). Merit pay would allow for the recruitment and retention of effective teachers according to Hess (2010). Ravitch (2010b) agreed and pointed out districts would use merit pay to fill hard-to-staff areas, pay for extra duties, and for hard-to-staff schools. The ASPIRE and ProComp programs, successful merit pay systems, were instrumental in retaining staff, placing educators in hard-to-staff schools, and recruiting future educators.

Several of the participants surveyed believed merit pay would help with the recruitment of teachers. One participant thought it might possibly attract individuals to the teaching profession who would not otherwise consider it because of the pay structure. Participant 209 reflected, “If the system is set up correctly and implemented in a fair way, then I believe it could help draw high quality educators to schools and keep the good ones there longer.”

However, interview participants disagreed. Mr. Brown did not think merit pay would increase the number of teachers in shortage areas, especially in the areas of special education and industrial technology. Pointing out merit pay would not impact recruiting, Mr. Clark added, “I think it would deter new teachers from joining the field.” Survey Participant 5 declared:

It would make the taxpayers happy because the personnel costs would go down—due to the new teachers every two to three years. It would undermine the idea that with experience comes quality teaching! There would always be someone hungry for your job and you would be replaced at will (even for only financial savings) nothing to do with performance!

Referring to some of the disadvantages described in both the interviews and surveys, Participant 85 responded, “It would be very negative. If someone is entering a profession for money, they should not be a teacher. Teachers depend on the collective efforts, talents of a shared desire to improve individual student’s lives for our country’s benefit.”

Supporting the traditional salary structure, a system used in 95% of school districts (Johnson & Papay, 2009), survey Participant 131 noted:

Given a choice, I believe teachers would prefer to apply for a position and/or stay employed in a district where salary is known and predictable. We all prefer the stability of knowing from year-to-year what our salary will be. New teachers in particular may be intimidated by a merit pay system due to their inexperience and comparative lack of confidence due to that lack of experience.

Agreeing, Mr. Evans believed a strong salary schedule should be in place before a merit pay plan is designed.

The idea of merit pay is clearly in the forefront of education issues. Yet, Participant 75 clearly had a different perspective as she stated, “I hadn’t thought about this question before. However, I wouldn’t want to imagine my life as a teacher under such stress and pressure that merit pay surely entails.”

Research question six: What are the perceptions of educators on the impact of merit pay on retaining highly-qualified teachers? Researchers have agreed the recruitment and retention of effective teachers could occur if merit pay were implemented. Retaining highly-qualified teachers is essential according to several of the education leaders and the majority of the educators surveyed. Seventy-six percent of those surveyed indicated merit pay would impact the retention of highly-qualified teachers. Teacher recruitment and retention were goals established in Denver, Colorado’s ProComp, which has been one of the most successful merit pay programs in the United States.

By paying highly-qualified classroom teachers more, through a merit pay system, they might remain in the classroom instead of leaving the profession or moving into administration. Additionally, several participants thought merit pay would eliminate teachers who were not highly-qualified and who needed to find another occupation. Numerous other educators surveyed believed the teachers who are average may work harder; learn from others, thus becoming highly-qualified. Another participant agreed, “If the system is set up correctly and implemented in a fair way, then I believe it could help draw high quality educators to schools and keep the good ones there longer.”

Unfortunately, the NEA has found half of all new teachers leave the field of education within the first five years due to working conditions and salaries (Lambert, 2006). Additionally, Missouri was ranked 46th nationwide in educator's salaries. Mr. Evans viewed the issue of merit pay as a double-edged sword:

If the plan provides an outline for career growth for educators who want to seek additional responsibility without leaving the classroom or work site, it could help retain more effective teachers in the classroom....On the other hand, if the plan is competitive rather than collaborative,...it will not encourage educators to seek additional responsibility by helping other educators.

One participant worried some teachers who have the potential of becoming great will become discouraged and leave the profession before reaching their potential.

Several participants wanted to know the definition of the term *highly-qualified*. One interview participant urged, "We must use the same definitions, know what they are, and define them clearly." Undoubtedly, highly-qualified teachers by any definition must be retained. When it comes to merit pay, one interview participant insisted, "You can't argue with the philosophy. You pay your best." The question remains, how is this accomplished?

Conclusions

Merit pay is almost inevitable as states look for funding in a tight economy. Districts are looking for ways to recruit and retain teachers. Educators must provide input on this important issue and be part of the conversation. It is essential the issue of merit pay be looked at closely. From the data collected in this study, educators in Missouri do not support merit pay. Mrs. Wilson determined, "We need to come up with a plan that

teachers will support and place it on the table. Educators cannot appear to oppose merit pay but identify what they are willing to work for to earn incentives and bonuses.”

Looking closer at this issue, all stakeholders must be a part of the conversation. Stakeholders were identified as teachers, administrators, community members, and professional organizations. Buck (2010), a fifth grade teacher advocated, “We can achieve this goal if we work with policymakers and elected officials to frame this debate, rather than letting others frame it for us.”

Implications

Teachers have been the targeted audience for merit pay consideration; however, superintendents have not been included. Why? This question was raised by the editorial board of the Springfield News-Leader (Our Voice, 2010). One urban superintendent’s raises are not based on factors related to performance, although he is a supporter of merit pay (Our Voice, 2010). A study by the Show-Me Institute (as cited in Our Voice, 2010), found only 65 of the 451 superintendents in Missouri had salary increases tied to performance. Many educators do not like tying test scores to pay, but is fair and equitable when the top officials of school districts are not evaluated on student scores as well? This topic deserves more research and perhaps a study on the criteria used to determine superintendents’ salaries should be conducted.

Many discussions about the revisions to the salary structure have included the redesign of teacher evaluation processes. Legislators have wrestled with the idea of rewriting the tenure laws and requiring the state education department to redesign the evaluation system for educators. As proponents of merit pay suggest, student achievement must be part of the criteria to evaluate and reward teachers through a merit

pay system. Yet, are teachers included in the redesign of the evaluation process? If they are not, they should be. One of the main concerns regarding merit pay is evaluator bias. In order to overcome this issue, principals and assistant principals would need to be accurately trained on how to evaluate solely on the criteria and leave out any other personal opinions or bias.

Another issue is the discussion of discontinuing tenure. Some believe if merit pay is offered, teachers need to relinquish their tenure. More research needs to be conducted on this issue, and more questions need to be asked. Can a merit pay system co-exist with tenure? What are the benefits? What are the disadvantages?

Recommendations

Any discussion regarding education reform should begin with an essential question. The question regarding the topic of merit pay is: Is the compensation system, whether a traditional salary schedule or an alternative form, actually designed to improve teaching and learning, or is it to appease those who believe the old system is outdated and ineffective? There are many individuals and groups outside of education who are trying to reform education but do not understand the terminology or how schools work. Education reformers and stakeholders need to have dialogue with educators regarding the issues they face in the classroom.

The first goal must be to open the lines of communication and listen to the advantages and disadvantages. The second goal is for all involved to be fully educated on the topic and work from the same definition. The term merit pay needs to be clearly defined to allow everyone to be on the same page. As one interview participant questioned, “What is your definition of merit pay? Until we have established that, our

conversation cannot continue.” The third goal must be to work together. If one of the barriers to merit pay is the lack of collaboration, then stakeholders must collaborate on the creation of a merit pay plan. Participant 213 explained, “I do not feel one’s job should be based on one aspect alone. Evaluations, job performance, analyses of test scores, ethics, pursuit of continued learning, and years of service should be considered as a blend of salary level achievement.” Once a compensation program is designed, it should be voluntary. Teachers, schools, and districts should determine if they want to be a part of the system.

Additional research needs to be conducted regarding the perceptions of Missouri educators regarding merit pay. This study was limited to educators attending professional conferences or in-service activities leaving a number of teachers and professional organizations excluded. Only 219 teachers in two professional organizations and two schools were included in this study. A broader group of educators would allow for rural educators and those not attending professional meetings to voice their perceptions and opinions.

If merit pay is not the answer, then other options should be considered. The president of the Economic Policy Institute shared his view about merit pay. Mishel suggested, “There are a lot of people who talk very simply about merit pay. Let’s move beyond a discussion of merit pay...and have a full-bodied discussion of other, more promising ways of changing teacher compensation systems” (as cited in Orr, 2009, p. 2).

Summary

Merit pay is, and will continue to be, a very controversial topic. From the research conducted, it is evident the Missouri teachers included in this study are opposed to merit

pay. Teachers do not believe a single test score gives an adequate picture of students' or teachers' abilities. There are many additional factors affecting students and their educational attainments. All of these factors need to be taken into consideration when determining the skills of educators. Multiple criteria should be included in any compensation plan created to determine the effectiveness of a teacher. Educators and education leaders agree something needs to be done to recruit and retain highly-qualified teachers. However, good teaching is not about money but a sense of calling (Ramirez, 2010).

While some educators believed the current salary structure is effective, others want to reform the compensation system. Educators believed there are better methods to compensating teachers instead of a merit pay system. Suggestions were given for alternative methods such as Career Ladder formats, tiered plans, and bonuses for additional responsibilities and achievements. Utilizing ideas from successful and unsuccessful plans would allow for a future plan to be created. Educators want to be involved in the development, implementation, and evaluation of such a plan.

As reformers of education make changes, create legislation, and redesign school systems, it is essential educators are at the table. This effort should be collaborative in nature. As a result of teamwork, a fair way to compensate the teachers of Missouri can be created.

Appendix A

Educator Survey Questions Regarding Merit Pay

Demographic Information: This is for the purpose of analyzing the results by various groups.

Please circle your selection:

1). Gender: Male Female

2). Indicate your current level of experience as an educator:

0-5 years	11-15 years	21-25 years
6-10 years	16-20 years	26 or more years

3). Indicate your category as an educator:

Tenured Teacher	Non-tenured Teacher	Administrator
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4). Indicate your work assignment:

Early Childhood	Elementary	Middle	Secondary	Combination
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5). Indicate your current position

Classroom-core subject (communication arts, math, science, social studies)

Specialty area (art, physical education, music, vocational, business)

Library/instructional media

Special Education

Superintendent

Principal

Assistant Principal

Director

Other (please state): _____

6). District size (based on student population):

Below 1,499	1500-2,999	Above 3,000
-------------	------------	-------------

7). Association Affiliation:

MAFT	MNEA
MSTA	MAESP
NASSP	OTHER _____
NONE	

Definition of Merit Pay for Survey Reference:

Merit pay. A term describing performance-related pay. Through a merit pay system, bonuses are provided for workers who perform their jobs better, according to measurable criteria.

Rate each statement:

Strongly Agree, Agree, Neutral, Disagree, Strongly Disagree, Not Applicable

8). The current pay structure (salary schedule) is an adequate way to pay educators.

Strongly Agree, Agree, Neutral, Disagree, Strongly Disagree

9). I would consider working in a district that offered merit pay.

Strongly Agree, Agree, Neutral, Disagree, Strongly Disagree

10). I would work for merit pay if only based on student test scores.

Strongly Agree, Agree, Neutral, Disagree, Strongly Disagree, Not Applicable

11). I would work for merit pay if tied only to the performance of students in my classroom (individual growth, portfolios, targeted growth, etc).

Strongly Agree, Agree, Neutral, Disagree, Strongly Disagree, Not Applicable

12). I would work for merit pay if tied to building-wide performance criteria.

Strongly Agree, Agree, Neutral, Disagree, Strongly Disagree, Not Applicable

13). Merit pay is the best option to increase teacher wages.

Strongly Agree, Agree, Neutral, Disagree, Strongly Disagree

14). Merit pay is a fair way to measure teacher performance.

Strongly Agree, Agree, Neutral, Disagree, Strongly Disagree

15). I am concerned my district will move to merit pay during the remaining years of my career.

Strongly Agree, Agree, Neutral, Disagree, Strongly Disagree

16). My beliefs regarding merit pay are influenced by my professional association's beliefs.

Strongly Agree, Agree, Neutral, Disagree, Strongly Disagree, Not Applicable

17). Merit pay will impact the recruiting of future educators.

Strongly Agree, Agree, Neutral, Disagree, Strongly Disagree

18). Merit pay will impact the retention of highly-qualified teachers.

Strongly Agree, Agree, Neutral, Disagree, Strongly Disagree

For the next group of questions, mark all answers that apply:

19). Merit pay should be tied to:

State Test Scores (MAP or TerraNova) District Test Scores (district test)

Peer Evaluations Principal Evaluations

Parent Evaluations Portfolios

Other (please list): _____

20). If a merit pay plan were developed, who should be involved?

Parents Students

Teachers Administrators

Community Members Business Leaders

District Leaders State Leaders

Professional Organizations Local Colleges/Universities

Other (please list): _____

21). If merit pay were implemented, who should monitor and evaluate the system?

Parents

Students

Teachers

Administrators

Community Members

Business Leaders

District Leaders

State Leaders

Professional Organizations

Local Colleges/Universities

Other (please list): _____

For the next group of questions please write your thoughts and opinions:

22). In your opinion, what are the advantages of a merit pay system?

23). In your opinion, what are the disadvantages of a merit pay system?

24). In your opinion, what impact would merit pay have as a motivator for recruiting and retaining highly-qualified educators?

Appendix B

Interview Questions for State Board Members, Education Association Leaders (MAFT, MNEA, MSTA), and Legislators

- 1). What is your view or professional association's view on merit pay?
- 2). How have you gained information regarding teachers' views of merit pay?
- 3). What are the advantages of merit pay? Why?
- 4). What are the disadvantages of merit pay? Why?
- 5). How would merit pay affect the recruitment of teachers? Explain.
- 6). How would merit pay affect the retention of highly effective teachers? Explain.
- 7). What do you see as the future of merit pay in Missouri?
- 8). How do you respond to the opponents/proponents of merit pay, based on your views?
- 9). How should a merit pay plan be written in Missouri? Who should participate in this task?
- 10). What components should be part of the merit pay plan? What should not be part of the plan?
- 11). In your opinion, what are alternatives to merit pay?
- 12). What other comments regarding merit pay would you like to share?

Appendix C

Letter of Participation

Educator Survey

<Date>, 2010

Dear Educator,

I am writing this letter as a doctoral student at Lindenwood University to ask for your participation in my dissertation research. My dissertation focuses on the issue of merit pay. As an educator, I wholeheartedly understand the demands on your time and I appreciate your assistance in advance.

Attached is the Informed Consent Form for your review and signature. If you agree to participate in the study, please sign the consent form. The survey consists of 24 questions and will take 10-15 minutes to complete.

Your participation in this research study is voluntary and you may withdraw at any time. Confidentiality is assured. If you have questions, please call me (417) 582-0990 or e-mail (mma774@lionmail.lindenwood.edu). Once this study has been completed, the results will be available to you by request.

Sincerely,

Melissa Albright
Doctoral Candidate
Lindenwood University

Appendix D

**Lindenwood University
School of Education
209 S. Kingshighway
St. Charles, Missouri 63301**

Informed Consent for Participation in Research Activities
<Surveys>

The Merit of Merit Pay

Principal Investigator: Melissa Albright

Telephone: 417-582-0990 E-mail: mma774@lionmail.lindenwood.edu

Participant _____ Contact information _____

1. You are invited to participate in a research study conducted by Melissa Albright under the guidance of Dr. Sherry DeVore.

The primary purpose of the study is to examine the perceptions of teachers and administrators toward the merit pay system. This group will include certified public school teachers, superintendents, assistant superintendents, principals, assistant principals, and directors at the district level.

The perceptions of educational leaders within professional organizations will also be examined in regard to merit pay. This group will include leaders in the three professional organizations in Missouri: Missouri American Federation of Teachers, Missouri State Teachers' Association, and Missouri National Education Association, as well as the state commissioner of education, state board members, and legislators.

The secondary purpose of this study will be to examine the effects of merit pay on recruiting and retaining highly-qualified teachers.

2. a) Your participation will involve:
 - Completing a survey on your perceptions and opinions on the topic of merit pay.
 - All survey data will be secured for a three year period and then destroyed.
 - To ensure confidentiality and anonymity, the survey data will not contain any identifying information. A pseudonym will be created to further maintain confidentiality and encourage each participant to respond honestly and openly about merit pay.

b) The amount of time involved in your participation will be approximately 10-15 minutes to complete the written survey.

Surveys will be available to approximately 600 educators:

- Educators attending the fall conferences of the AFT (date to be determined);
- Educators attending the fall conference on November 12-13, 2010, of the MNEA; and
- Educators attending the fall conference on November 11-12, 2010, of the MSTA.

3. There are no anticipated risks associated with this research.
4. There are no direct benefits for your participation in this study. However, your participation may contribute to the knowledge about merit pay.
5. Your participation is voluntary and you may choose not to participate in this research study or to withdraw your consent at any time. You may choose not to answer any questions that you do not want to answer. You will NOT be penalized in any way should you choose not to participate or to withdraw.
6. We will do everything we can to protect your privacy. As part of this effort, your identity will not be revealed in any publication or presentation that may result from this study and the information collected will remain in the possession of the investigator in a safe location for three years and then destroyed.
7. If you have any questions or concerns regarding this study, would like a copy of the results, or if any problems arise, you may call the Investigator, Melissa Albright at 417-582-0990 or the Supervising Faculty, Dr. Sherry DeVore at 417-881-0009. You may also ask questions of or state concerns regarding your participation to the Lindenwood Institutional Review Board (IRB) through contacting Dr. Jann Weitzel, Vice President for Academic Affairs at 636-949-4846.

I have read this consent form and have been given the opportunity to ask questions. I consent to my participation in the research described above.

Participant's Signature Date

Participant's Printed Name

Signature of Investigator Date

Investigator's Printed Name

Appendix E

Letter of Participation

Educational Leaders Interview

<Date>
<Title><First Name><Last Name>
<Position>
<Address>

Dear <Title><First Name><Last Name>,

Thank you for participating in my research study, *The Merit of Merit Pay*. I look forward to talking with you on <date><time> to gather your perceptions and insight into merit pay. I have allotted one hour to conduct our interview.

Enclosed are the interview questions to allow time for reflection before our interview. I have also enclosed the Informed Consent Form for your review and signature. If you agree to participate in the study, please sign the consent form.

Your participation in this research study is voluntary and you may withdraw at any time. Confidentiality is assured. If you have questions, please call me (417) 582-0990 or e-mail (mma774@lionmail.lindenwood.edu). Once this study has been completed, the results will be available to you by request.

Sincerely,

Melissa Albright
Doctoral Candidate
Lindenwood University

Appendix F

**Lindenwood University
School of Education
209 S. Kingshighway
St. Charles, Missouri 63301**

Informed Consent for Participation in Research Activities <Interviews>

The Merit of Merit Pay

Principal Investigator: Melissa Albright

Telephone: 417-582-0990

E-mail: mma774@lionmail.lindenwood.edu

Participant _____ Contact information _____

1. You are invited to participate in a research study conducted by Melissa Albright under the guidance of Dr. Sherry DeVore.

The primary purpose of the study is to examine the perceptions of teachers and administrators toward the merit pay system. This group will include certified public school teachers, superintendents, assistant superintendents, principals, assistant principals, and directors at the district level.

The perceptions of educational leaders within professional organizations will also be examined in regards to merit pay. This group will include leaders in the three professional organizations in Missouri: Missouri American Federation of Teachers, Missouri State Teachers Association, and Missouri National Education Association, as well as the state commissioner of education, state board members, and legislators.

The secondary purpose of this study will be to examine the effects on recruiting and retaining highly-qualified teachers.

2. Your participation will involve:
 - Verbally answering open-ended questions in a face-to-face interview on your perceptions and opinions on the topic of merit pay.
 - This interview will be videotaped/audio taped to verify your responses are transcribed accurately.
 - A pseudonym will be created to maintain confidentiality and encourage you to speak freely, honestly, and openly about merit pay.
 - All recordings will be secured for a three year period, and then destroyed.

***I give my permission for the interview to be videotaped/audio taped (participant's initials ____).**

- The amount of time involved in your participation will be approximately one hour to complete the interview.

The following will be invited to participate in a face-to-face interview:

- Two leaders from each professional organization in Missouri (MAFT, MNEA, and MSTA);
 - Missouri Commissioner of Education;
 - Two Missouri School Board members; and
 - Three legislators.
3. There are no anticipated risks associated with this research.
 4. There are no direct benefits for your participation in this study. However, your participation may contribute to the knowledge about merit pay.
 5. Your participation is voluntary and you may choose not to participate in this research study or to withdraw your consent at any time. You may choose not to answer any questions that you do not want to answer. You will NOT be penalized in any way should you choose not to participate or to withdraw.
 6. We will do everything we can to protect your privacy. As part of this effort, your identity will not be revealed in any publication or presentation that may result from this study and the information collected will remain in the possession of the investigator in a safe location for three years and then destroyed.
 7. If you have any questions or concerns regarding this study, would like a copy of the results, or if any problems arise, you may call the Investigator, Melissa Albright at 417-582-0990 or the Supervising Faculty, Dr. Sherry DeVore at 417-881-0009. You may also ask questions of or state concerns regarding your participation to the Lindenwood Institutional Review Board (IRB) through contacting Dr. Jann Weitzel, Vice President for Academic Affairs at 636-949-4846.

I have read this consent form and have been given the opportunity to ask questions. I consent to my participation in the research described above.

Participant's Signature

Date

Participant's Printed Name

Signature of Investigator

Date

Investigator's Printed Name

Appendix G

**Lindenwood University
School of Education
209 S. Kingshighway
St. Charles, Missouri 63301**

Informed Consent for Participation in Research Activities
<Interviews via Electronic mail>

The Merit of Merit Pay

Principal Investigator Melissa Albright

Telephone: 417-582-0990

E-mail: mma774@lionmail.lindenwood.edu

Participant _____ Contact information _____

1. You are invited to participate in a research study conducted by Melissa Albright under the guidance of Dr. Sherry DeVore.

The primary purpose of the study is to examine the perceptions of teachers and administrators toward the merit pay system. This group will include certified public school teachers, superintendents, assistant superintendents, principals, assistant principals, and directors at the district level.

The perceptions of educational leaders within professional organizations will also be examined in regards to merit pay. This group will include leaders in the three professional organizations in Missouri: Missouri American Federation of Teachers, Missouri State Teachers Association, and Missouri National Education Association, as well as the state commissioner of education, state board members, and legislators.

The secondary purpose of this study will be to examine the effects on recruiting and retaining highly-qualified teachers.

2. Your participation will involve:
 - Verbally answering open-ended questions in an interview on your perceptions and opinions on the topic of merit pay.
 - This interview will be audio taped to verify your responses are transcribed accurately.
 - A pseudonym will be created to maintain confidentiality and encourage you to speak freely, honestly, and openly about merit pay.
 - All recordings will be secured for a three year period and then destroyed.

***I give my permission for the interview to be audio taped (participant's initials ____).**

- The amount of time involved in your participation will be approximately one hour to complete the interview.

The following will be invited to participate in an interview:

- Two leaders from each professional organization in Missouri (MAFT, MNEA, and MSTA);
 - Missouri Commissioner of Education;
 - Two Missouri School Board members; and
 - Three legislators.
3. There are no anticipated risks associated with this research.
 4. There are no direct benefits for your participation in this study. However, your participation may contribute to the knowledge about merit pay.
 5. Your participation is voluntary and you may choose not to participate in this research study or to withdraw your consent at any time. You may choose not to answer any questions that you do not want to answer. You will NOT be penalized in any way should you choose not to participate or to withdraw.
 6. We will do everything we can to protect your privacy. As part of this effort, your identity will not be revealed in any publication or presentation that may result from this study and the information collected will remain in the possession of the investigator in a safe location for three years and then destroyed.
 7. If you have any questions or concerns regarding this study, would like a copy of the results, or if any problems arise, you may call the Investigator, Melissa Albright at 417-582-0990 or the Supervising Faculty, Dr. Sherry DeVore at 417-881-0009. You may also ask questions of or state concerns regarding your participation to the Lindenwood Institutional Review Board (IRB) through contacting Dr. Jann Weitzel, Vice President for Academic Affairs at 636-949-4846.

I have read this consent form and have been given the opportunity to ask questions. I consent to my participation in the research described above. I choose to respond to the questions via electronic mail.

Your consent is acknowledged by responding to the questions.

Melissa Albright
 Doctoral Candidate

Appendix H**Institutional Review Board Disposition Report****11-40
IRB Project Number****Lindenwood University
Institutional Review Board Disposition Report****To: Ms. Melissa Albright****CC: Dr. Sherry Devore**

The IRB has reviewed your application for research, and it has been approved with a comment/question that requires no response but is merely offered as a suggestion that may aid your research.

Is it necessary to assign a pseudonym to each participant, or would it be more efficient to simply assign a number for the purposes of keeping track of the participants? Is there a need to keep track of names to differentiate response of the survey?

Even assuming only 50% response there would be 300 unique names that you would have to assign. Random numbers may be more convenient as a record keeping tool.

It may well be reasonable to assign pseudonyms to the interviewed participants to discuss the responses in the final dissertation, but that represents a much smaller group than all of the participants.

Ricardo Delgado
Institutional Review Board Chair

11/08/10
Date

Appendix I Position Paper on Professional Compensation

Professional Compensation in Missouri

"The goal of public education is for all students to have access to a quality public school where they can develop the knowledge and skills to participate fully in our democracy and to succeed in this dynamic 21st century world."
--Missouri NEA Education Transformation Task Force (2009)

Education systems and structures are transforming to meet the demands of modern students, classrooms and communities. Compensation systems for education employees* are an important component of that transformation. A professional compensation system may be based solely on a single salary schedule or it may be an alternative compensation system that supplements or replaces a single salary schedule. Recruiting, retaining and rewarding high quality educators* are key goals of any legitimate education compensation system. School districts/education institutions and school employees need to collaborate in designing professional compensation structures that meet the needs of the students, the staff and the district/education institution through a collective bargaining process.

A strong, single salary schedule avoids many of the pitfalls that are found in a differentiated staffing plan. It does not impose a divisive hierarchy of jobs on a group of educators previously defined as equals. A strong, single salary schedule contains no quotas, and it supports the idea that education is a true profession.

The principles outlined below have been established to provide a framework for the transformation of professional compensation plans. Where developed and implemented well, these plans aid in the recruitment and retention of educators in Missouri's public schools.

To advance these goals, the following principles shall apply:

7. Provide professional beginning salaries with a path for growth through a strong salary schedule.
8. Recognize and reward educators who attain and can demonstrate knowledge and skills that improve their professional proficiency.
9. Recognize and compensate improved teacher practice that is a factor in student learning and other student outcomes.
10. Provide an outline for career growth for educators who want to seek additional responsibility without leaving the classroom or work site.
11. Compensate all education employees on par with the salary, professional growth opportunities and career earnings of comparably prepared professionals.
12. An alternative compensation plan should be considered only after a district/education institution has, over time, implemented a strong salary schedule.

**Throughout this document, the terms "educators" and "education employees" refer to teachers and education support professionals.*

Definitions for terms used throughout this position paper are included in a glossary.

In order for a local education association (LEA) to consider approval of an alternative compensation plan, the plan must include the following features:

I. Commitment to Student Learning

- a. Attract and retain quality staff.
 - i. The salary is competitive to neighboring districts/education institutions and other professional salaries in the area.
 - ii. Encourage teachers to stay in the classroom and ESP members to stay in the district/education institution.
 - iii. Attract teachers to hard-to-serve and/or hard-to-staff assignments.
 - iv. Recognize diversity of student needs in teaching assignment.
 - v. Include teaching and learning conditions that support student learning.
 - vi. Incentives should be significant enough to celebrate success but not punitive to those not receiving the incentive.
- b. Encourage staff collaboration and not competition.
- c. Include a broad curriculum for every student.
 - i. The program must encourage building students' skills in academic and non-academic areas.
 - ii. Non-tested subjects should not be devalued.
- d. Use multiple measures to assess student learning including teacher-made assessments.
- e. Support instructional improvements that increase student engagement.
 - i. The question, "Is the student truly being considered?" must be asked in the development and implementation of the program.
 - ii. The program must motivate students, not rely solely on their test scores.
 - iii. The program must respect the confidentiality of students.

II. Career Growth and Development

- a. Include a professional growth salary schedule accompanied by a bargained, quality evaluation system linked to the state licensure system and state teaching standards.
- b. Support instructional improvements with:
 - i. Time for collaboration and professional development for teachers and support staff.
 - ii. Quality professional development that follows standards such as those of the National Staff Development Council (NSDC).
 - iii. Professional development aligned with the learning needs of students and instructional needs of staff
 - iv. Professional development that includes reimbursement for tuition.
- c. Hold participants accountable for meeting high standards of performance as measured by negotiated evaluation processes that are objective, fair, understandable and predictable.
- d. Be flexible to include graduate degrees, advanced licensure, leadership responsibilities, length of day or year, tiered system or extracurricular activities.
- e. Be fair and justifiable, clearly written and provide confidential data for educators and students.

- f. Fully inform participants of the pay involved in program participation.

III. Collaborative and Transparent Development and Implementation

- a. Consider alternative compensation only after a strong base salary with adequate increases has been implemented with maximum salary achieved in 10 years.
- b. Include a locally bargained, collaborative process with the district/education institution and union involved in the decision-making--resulting in improved relationships with labor and management.
 - i. Include parents and stakeholders who:
 - 1. Are aware of the program and its ultimate impact on students
 - 2. Feel informed of the process and valued in the process of development and implementation of the program
 - 3. Are involved in discussions regarding the goals of the program
 - ii. Include an appeals process for the system.
 - iii. Include building-wide incentives, individual criteria or a combination of these (as locally bargained).
- c. Require an annual process of monitoring and evaluation that includes the LEA at all levels to make sure that the program is producing its intended goals/targets. This process should include:
 - 1. Monitoring systems developed and maintained to track valid, reliable and meaningful data.
 - 2. Monitoring systems developed and maintained to examine the effectiveness of old and new programs to prevent work overload
 - 3. A manageable administrative management system that does not hinder the district's/education institution's ability to benefit students or pay staff, or sacrifice students' instructional time.

Provide adequate and sustainable local funding sources, both initially and ongoing. Grants should be viewed only as temporary resources that will not sustain a career salary program.

Allow for voluntary participation of staff.

Guarantee current salary shall not be reduced for any educator.

Provide access for all staff without quotas or caps that arbitrarily limit the number of participants.

Include a process of training participants, evaluators and administrators.

Include a reasonable timeframe for developing, implementing and monitoring of the program.

Consider the possibility of a pilot or phase-in during the planning phase.

Conclusion: Education transformation for the 21st century will include varying plans to compensate education personnel. The position of Missouri NEA is that any alternative pay plan should be considered only after a district/education institution has, over time, implemented a strong salary schedule. Any pay plan must be collectively bargained by the local education association. Although some local education associations will choose to continue use of the traditional salary schedule, this position paper sets forth guidelines for those local associations who choose to embark upon the challenge of bargaining an alternative, professional compensation plan.

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Vita

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Melissa is a dedicated, resourceful, and flexible teacher with 22 years of classroom experience. She earned a Bachelor's of Science Degree in Elementary Education from Truman State University in 1989 and completed a Master's of Science in Education in Administration and Supervision from Northwest Missouri State University in 1993. She earned a Specialist in Education (Superintendent and Elementary Principal Administration) from Northwest Missouri State University in 1996. Melissa earned National Board for Professional Teaching Standards Certification in the area of Middle Childhood Generalist in 2004. She has taught in the St. Joseph and Branson public school districts in Missouri. Melissa currently teaches fifth grade for the Springfield Public School District, in Springfield, Missouri.