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**Teacher Bonuses for
Extra Work: A Profile
of Missouri's Career
Ladder Program**

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CHAPTER I

BACKGROUND

A. POLICY PROBLEM AND RESEARCH QUESTIONS

Public school teachers are usually paid according to two objective criteria: their years of experience and their educational attainment (certificates, degrees, or coursework). This system, known as the uniform salary schedule, has received criticism for its unfairness, its failure to reward effort or skill, and its inefficiency in not encouraging hard work or talent (Hanushek 1981).

Education policymakers seeking to reform the system of teacher compensation have tried many times, often without success, to tie teacher compensation more closely to the quantity and quality of teachers' work. An influential 1983 report by the National Commission on Excellence in Education, entitled *A Nation at Risk*, spotlighted the problem and spurred a wave of reform during the mid- to late 1980s. Many of the reforms included career ladders for teachers. Career ladders allow teachers to advance in salary based on factors other than seniority, such as demonstrated skills or performance. Most of the reforms enacted in the mid- to late 1980s did not last long (Glazerman 2004), but the present study focuses on one exception: a teacher career ladder program started in Missouri in 1986 that continues to operate today more or less unchanged.

Missouri's Career Ladder program set forth two primary goals: to improve student achievement and to attract and retain effective teachers. The program offers opportunities for teachers to earn extra pay for extra work and professional development, with eligibility for these opportunities based on a combination of seniority and subjective performance evaluation. It is the intent of Missouri policymakers to improve academic services, programs, and student learning outcomes both by encouraging teachers to engage in productive activities and by attracting and retaining effective teachers through the extra pay associated with those activities.

1. Research questions

This report is one of three from a study conducted by Mathematica Policy Research, Inc. (MPR) of the Missouri program, which posed the following broad research questions:

1. How does the program operate in theory and in practice?
2. What effect does the Career Ladder have on student achievement?
3. What effect does the Career Ladder have on teachers' career decisions, specifically their decision to remain in their district or in teaching?

This report directly addresses the first research question while providing some teacher and district perspectives on the second and third research questions. Two companion reports (Booker and Glazerman 2008a; 2008b) address the second and third questions by providing a quantitative analysis of the relationships between Missouri's Career Ladder and student and teacher outcomes. The goal of the present report is to document everything we were able to learn about the program that might help readers interpret the two companion reports. We use qualitative data to understand how districts came to be in the program, how teachers decided to participate, and how teachers qualified for and earned payments. We also explored the mechanics of the program, its oversight and accountability, and the possible pathways by which it could produce beneficial outcomes.

2. Data

This report draws on the following three types of data:

1. We reviewed all the relevant **official program documentation** that might tell us how the program works, including state legislation, regulations issued by the Department of Elementary and Secondary Education (DESE), and other program documents, such as the set of annual reports issued by DESE. We also queried a longitudinal dataset that DESE provided covering teacher and district participation in the program since 1991.
2. We conducted four **focus groups** with teachers who were participating in Career Ladder. We conducted each focus group in a separate school district, selected to provide diversity of settings (urban, suburban, rural). It is important to keep in mind that the focus groups were designed to elicit stories about how teachers came to participate in the program and how they might have experienced it, not to generalize about all teachers who ever took part in Career Ladder. Therefore we report on experiences without particular regard to the number or percentage of teachers who had each particular experience or impression. We spoke with teachers in grades K-12 who were at various stages of the Career Ladder.
3. We conducted **telephone interviews** with officials from 15 randomly selected participating school districts. The interviews were aimed at understanding how districts came to participate in the program and at how program operations look from a district level perspective. We intended to interview a district administrator, but always asked to speak with the most knowledgeable person on the district's Career Ladder participation. In most cases, this led us to the person who chaired a local Career Ladder committee, often a senior teacher.

Appendix A describes the data and methods used for this study. The telephone interview guide is attached as Appendix B and the focus group protocol as Appendix C.

3. Previous research

To date, policymakers have had little evidence on which to base answers to the above questions about Missouri's Career Ladder program. The only evidence that we were able to find on the effectiveness or even the operation of the program was limited to two reports on early program implementation (Schofer et al. 1987; Taylor and Madsen 1989), two single-district studies from the program's early years (Ebmeier and Hart 1992; Henson and Hall 1993), and a brief set of tabulations by the Missouri Department of Elementary and Secondary Education (DESE) that used 1999 test score results for a subset of the state's districts (Phillips 2000). Our qualitative analysis aims to understand program implementation. We drew on teacher perceptions of career effects elicited in focus groups with participating teachers as well as on interviews with program administrators, thereby producing a comprehensive picture of how Missouri's Career Ladder program operates and how it has evolved over more than two decades.

B. OVERVIEW OF THE MISSOURI CAREER LADDER PROGRAM

For background purposes, we describe the program as it operates in theory according to available program documents and published literature. Later chapters of the report examine program operations in more detail, presenting relevant information based on first-hand data collected for this study.

Program Structure and Operations. Through the Career Ladder program, teachers who meet statewide and district performance criteria are eligible to receive supplementary pay for Career Ladder responsibilities, which may take the form of extra work or participation in professional development activities. The program supplements the regular salary schedule but does not replace it. Career Ladder responsibilities must be academic in nature and directly related to the improvement of student programs and services. Career Ladder involves three stages based on years of experience and other factors. To move up the ladder, teachers must undergo an assessment at each stage through periodic observations and evaluations of documentation. Each successive stage offers the opportunity to receive more supplementary pay for Career Ladder responsibilities: up to \$1,500 for Stage I, \$3,000 for Stage II, and \$5,000 for Stage III. Out of more than 65,000 teachers in 524 districts statewide, more than 17,000 teachers (26 percent) from 333 districts (64 percent) participated in Career Ladder during the 2005–2006 school year.

The Missouri program is distinctive among the nation's teacher compensation reforms in that it is the most mature program. It has been operating since 1986, outlasting dozens of programs that were introduced around the country at the same time. In addition, the Missouri Career Ladder is unusual in how it mixes teacher performance, tenure, and extra responsibilities to define salary supplements. Teachers must advance along the Career Ladder based on tenure and progress in performance as rated by classroom observers, yet they receive bonuses for taking on extra responsibilities.

District Participation. Missouri’s program operates statewide, and districts must choose to participate and provide matching funds. Districts interested in implementing a Career Ladder program must submit a District Career Ladder Plan (DCLP) to DESE, which is responsible for approving plans that meet state guidelines for improving student academic services and programs. Districts share the cost of the program with the state. Poorer districts as well as smaller districts receive a higher percentage of state matching funds. The three possible matching rates are 60/40, 50/50, and 40/60.

Teacher Eligibility and Qualifications for a Bonus. To enroll in Career Ladder and qualify for bonuses, teachers must develop a Career Development Plan (CDP) associating each Career Ladder responsibility with either a designated plan or some other instructional improvement. The teacher then submits the CDP to the district Career Ladder Review Committee, which is made up of educators (selected by teachers) and administrators and charged with approving CDPs.

To receive a salary supplement, teachers must spend a specified amount of time on a certain number of responsibilities outside of their contracted time. Examples of extra responsibilities assumed by Career Ladder teachers include extra work—providing students with opportunities for enhanced learning experiences, remedial assistance, and various extended day/year activities—and professional development activities—participation in professional growth activities, including college classes, workshops, and professional organizations.¹ Teachers must also meet milestones for years of teaching and program experience, along with certain performance benchmarks on the state Performance-Based Teacher Evaluation (PBTE) system. The district’s Career Ladder Review Committee evaluates the teachers to determine if they have carried out their responsibilities and should receive supplementary pay. Except for the case of the Kansas City and St. Louis school districts, which operate their own retirement benefits plans, supplemental pay counts as salary for the computation of retirement benefits throughout the state.

Drawing on a series of interviews with district leaders and other stakeholders as well as on the results of focus groups with teachers, the remainder of this paper examines how Career Ladder has operated in practice. We discuss program operations at the district level in Chapter II. Chapter III reports on the teacher-level analysis of program operations. Chapter IV discusses the mechanism by which Career Ladder might have impacts. Chapter V offers some conclusions and discussion of conclusions and their implications for policy.

¹ DESE recommends that teachers should not spend more than one-third of Career Ladder hours on college classes and workshops.

CHAPTER II

THE ROLE OF THE DISTRICT

The Missouri Career Ladder is a state-level policy with funding and guidelines emanating from the state government, but it is locally implemented, with school districts deciding to participate and making decisions that shape how the program truly operates. This chapter explores the role of the district in relation to the state. Given that the decision to participate in the Career Ladder program necessarily first rests with the school district, we sought to understand how some Missouri districts came to participate in the program. The participation decision explains whom the program does and does not serve, helps illuminate district policymakers' program expectations, and could help state policymakers understand how state support and rulemaking affect intended participants. We sought to explain which districts participate and why, but we also explored the oversight role of the state and the district's own oversight body, called the Career Ladder Review Committee.

A. THE PARTICIPATION PROCESS

1. District Career Ladder Plan

To become eligible for state Career Ladder funding, a school district must first submit a District Career Ladder Plan to the state. The DCLP outlines the program's purpose, compensation levels, eligibility requirements, guidelines for teacher performance, and guidelines for acceptable (reimbursable) program activities.

The state guidelines for the DCLP specify a series of administrative guidelines and required tasks. Teachers, administrators, and community members are required to be involved in the development of the DCLP. Districts are directed to form a Career Ladder Review Committee, consisting of teachers and administrators, that is responsible for reviewing materials and approving payment to participating teachers. Under the direction of the school board and with assistance from assorted stakeholders, districts must also periodically review the Career Ladder program.

The state provides districts with a model Career Ladder plan and most of the districts where we conducted interviews followed the model plan closely when crafting their own DCLP. Consequently, most of the district plans we reviewed for the study were similar to

the state template (and, by extension, to each other. However, some districts enacted additional eligibility requirements for teachers or restricted the activities eligible for compensation, making their requirements more stringent than the state guidelines.

After submitting their initial DCLP, districts must resubmit their plan only if they modify it; otherwise, their existing plan remains in effect. Some district representatives that we interviewed indicated that the Career Ladder Review Committee periodically discusses whether to alter the allowable activities under the program, but they mentioned no other potential revisions to the DCLP. In some cases, districts have sharpened the focus on student achievement, subsequently requiring more work in activities such as tutoring.

2. State Support and Oversight

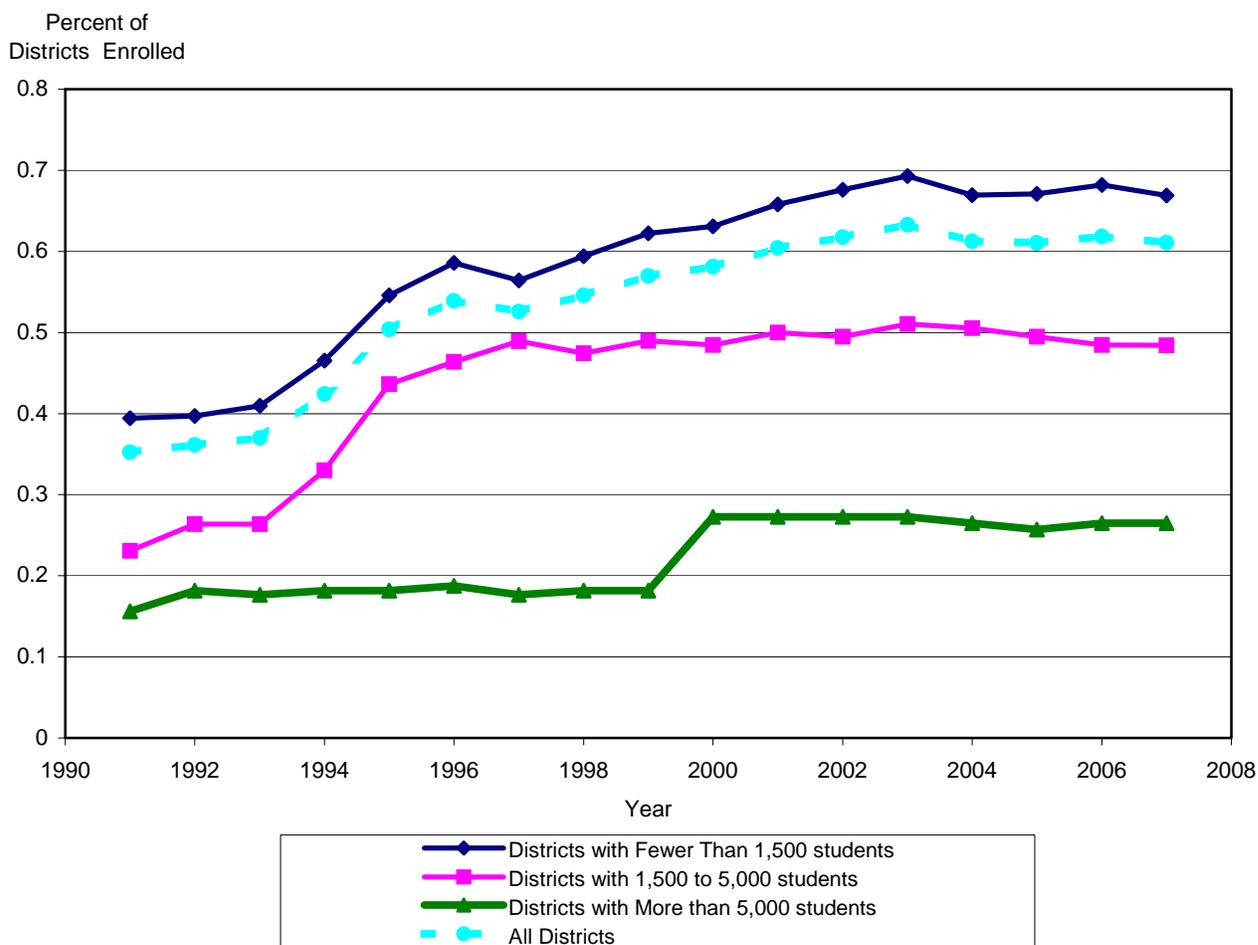
In addition to providing districts with guidelines and requirements for participation, the state has imposed other mandates on participating districts. By April 15 of every year, each participating district must provide the state with the exact number of participants for the following program year. Each district must then verify the count of participants midway through the school year. DESE stipulates other deadlines for confirming participants and a date for submitting a summary of Career Ladder program activities for the previous year.

The state undertakes several activities to assist districts with Career Ladder operations. DESE conducts technical assistance visits during the fall to a subset of participating districts; in 2007, it scheduled 62 such visits,, with 76 scheduled in 2008. However, most interviewees mentioned that the visits involved a review of their Career Ladder plans rather than technical assistance.

Our interviews with district and DESE representatives suggested that interaction between the district and the state was greater in the initial years of Career Ladder participation and then declined, perhaps reflecting a need to overcome start-up barriers. Some respondents indicated that the state previously offered districts assistance in the form of workshops during the summer. Most district staff thought that state oversight was effective; a number noted that DESE staff were readily available to answer questions and provide program guidance and that communication with the state was unproblematic.

B. PARTICIPATION TRENDS

The Career Ladder program has steadily grown over the years. In recent years, the number of districts participating in the program has risen to 328, or 60 percent of districts in the state. The number has generally been rising, from 63 districts (about 18 percent of the state) in the program's first year to 32 percent in 1991, the first year for which we have detailed data, to a peak of 62 percent in 2003, roughly the level at which participation remains today (see Figure II.1). The sharpest increase in participation came during the early 1990s.

Figure II.1. District Participation Rates

Once districts decide to participate, they typically do not discontinue participation. The only declines in the participation rate—in 1997, 2004, 2005, and 2007—have totaled less than 2 percentage points, with some of the declines, including the most recent one (from 61 to 60 percent), resulting from an increase in the number of districts in the state rather than from a decline in the number of participating districts.

State union and government officials told us that Career Ladder was designed with the aim of helping raise salaries in mainly small, rural school districts, as is largely borne out by participation trends. Figure II.1, which shows overall district participation trends since 1991 also shows trends for different types of districts broken into categories of small, medium, and large based on student enrollment. While participation has reached nearly 70 percent for small districts (defined as those with fewer than 1,500 students), it has hovered closer to 50 percent for medium-sized districts (having 1,500 to 5,000 students) and has remained under 30 percent for districts with more than 5,000 students.

C. EXPLAINING DISTRICT PARTICIPATION DECISIONS

1. Who Decides?

It may help policymakers understand why districts participate in Career Ladder to know that teachers are the driving force behind district participation decisions, according to people we interviewed. While school boards must allocate the local share of funds for participation, we often heard that teacher interest was the driving factor behind program participation. In one large district, the teacher's union wanted the program. In two other districts, a group of teachers interested in the program persuaded the school board to vote for participation despite the board's initial reluctance. In another district, the central administration—specifically, the superintendent—drove the participation decision, but teacher interest helped spur the decision.

2. Rationale for Participating: What Did Districts Hope to Achieve With the Program?

District representatives, many of whom were classroom teachers who had taken on special duties helping to run the local Career Ladder program, cited numerous program benefits as the rationale for program participation. Interviewees from nearly all of the districts said that increased teacher compensation was the primary goal for instituting the program. Many added that the increased pay was a means to achieve other goals, such as increased teacher satisfaction, teacher retention, and, ultimately, student achievement. Most thought that increased tutoring or other activities would lead to achievement gains; some respondents also perceived such activities as an inherently beneficial, that is, regardless of any potential impact on achievement. Representatives from one district mentioned improved classroom instruction through professional and curriculum development as an initial factor motivating the participation decision.

District representatives also cited cost factors that played into the participation decision. For districts, the cost is a primarily a function of the number of participating teachers and the level at which they participate—both of which determine the amount of bonuses to pay out—as well as the local matching rate. Districts may have other costs related to program administration, such as the initial effort of submitting and, if necessary, revising a DCLP and the ongoing efforts of evaluating teachers, reviewing plans, making local rule changes, and overseeing program operations. Next, we discuss the critical ingredient in determining the cost to a district, its matching rate for state funding.

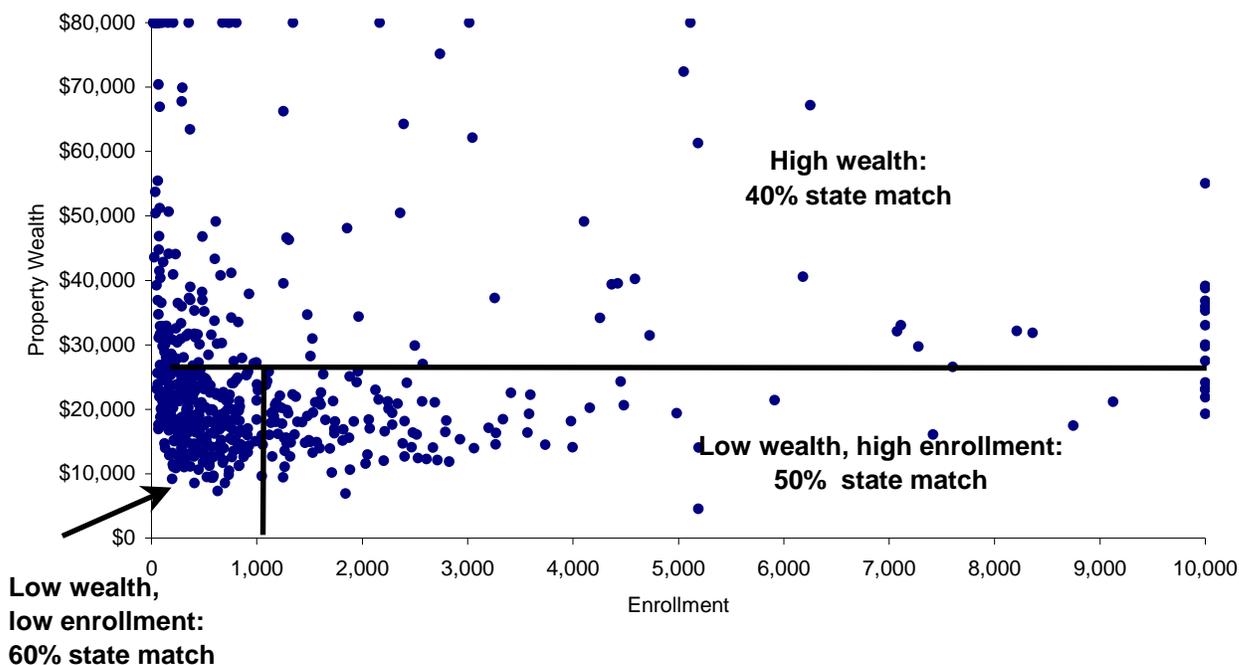
3. Matching Rate

Perhaps the most important factor in a district's decision to participate in Career Ladder is the generosity of the program, which is a function of the state matching rate. The higher the share of state funding per dollar of local funding, the more likely we expect that a district will participate, all other things equal. Matching rates vary by district, and the rules for determining matching rates have changed.

The matching rate formula in effect from program inception through the 1995–1996 school year was based entirely on the district’s assessed property value per pupil. Districts were ranked on this measure from lowest to highest and divided into 12 groups. Districts with the lowest assessed property value per pupil received 90 percent state funding for program expenses. For each successive group of districts, the state funding share declined by 5 percentage points, with the district in the highest group receiving 35 percent state funding.

Legislation enacted in 1996 significantly changed the funding formula by making the funding distribution narrower with fewer distinct matching rates; it also added total enrollment as a ranking factor. The current formula involves an initial sorting of districts by assessed property value per pupil, with the top 25 percent of districts on this measure categorized as Group 1. The remaining 75 percent of districts are then rank-ordered according to total enrollment from highest to lowest; the highest one-third of districts constitute Group 2, and the remaining two-thirds constitute Group 3. The first group receives 40 percent state funding, the second 50 percent, and the third 60 percent. Figure II.2 shows the current matching rate by district wealth (property value per pupil) and size (K-12 student enrollment), with the outliers “top-coded” (assigned to a maximum value of \$80,000 per pupil and 10,000 students) to make the figure easier to read. We used 1986 property valuation data and 1991 enrollment data for illustration because data from those years were most readily available.

Figure II.2. Matching Rate Factors



Notes: Calculations from data provided by the Missouri Department of Elementary and Secondary Education. Each dot represents one school district. Property wealth values are top-coded at \$80,000 per pupil; enrollment is top-coded at 10,000 students.

The revised funding formula reduced the influence of district property values per pupil while providing less state funding for districts with greater assessed wealth per pupil. It narrowed the range of state matching rates but added a component that gives weight to smaller, primarily rural, districts. To make the rate change more gradual, districts participating at the time of the legislative change and with a state matching rate higher than that specified by the new formula saw their state matching rate decrease by 5 percentage points per year until it reached the mandated level.

The rule change might have driven districts away from the program, but no interview respondents reported any effects of the funding formula change on their district's program participation. Several noted that the change had no effect whatsoever; others simply indicated that the district came up with any additional funds necessary to continue participation. For one district, the change caused the administration to re-evaluate the program and its costs/benefits; ultimately, the district decided to continue participation.

The 1996 legislative change also contained a "grandfather" clause specifying that teachers participating in the program at the time of the change and continuing to participate in the program thereafter would have their Career Ladder payments matched at the same rate that was in effect before the change, thereby reducing district expenditures for certain teachers. When asked, no district reported any effects of this provision.

D. PROGRAM OVERSIGHT WITHIN THE DISTRICT

Oversight within the district is primarily the responsibility of each district's Career Ladder Review Committee, whose members review teacher materials and approve payments to participants. According to DESE, the committee's mandate is broader still. "The local committee is responsible for the quality of the program at the district level," and its members "are required to adhere to the minimum standards established by" DESE.² The committee is also responsible for any additional standards that may be established.

1. Composition and Leadership of the Career Ladder Review Committee

The Career Ladder Review Committee is typically a teacher-led body composed of teachers and administrators, with some districts extending membership to community members or school board members. Committee members for districts in our sample numbered between 3 and 30, with an average of 11 members per district. Each committee was chaired by a teacher, except for one district's committee, which was headed by an administrator (the superintendent). Typically, however, the administrator was a non-voting member. Teacher committee members were generally more experienced teachers than the overall pool of participants.

² DESE Career Ladder Frequently Asked Questions. Available online at: <http://dese.mo.gov/divteachqual/careerladder/FAQs.htm>

2. Committee Responsibilities

The committee's primary responsibility is to oversee teacher-participants by reviewing teacher CDPs and requesting revisions/corrections as necessary, analyzing program hours, settling disputes, reminding teachers about deadlines, and answering program-related questions.

In ten of the twelve currently participating districts where we conducted interviews, the Career Ladder Review Committee made an annual presentation to the local school board on the state of the program. The weight attached to the presentation varied from district to district.

In six districts among the current participant districts in our sample, Career Ladder Review Committees were involved in recruiting teachers for the program. Sometimes, school building representatives, who may or may not be committee members, participated in recruitment activities. Building representatives are teachers selected from each school within the district to help answer questions from potential and current program participants.

In a few districts we studied, the Career Ladder Review Committee was heavily involved in authoring the DCLP. In three of the currently participating districts where we conducted interviews, the committee held discussions about the program's current standards and made decisions about whether priorities should be revised or requirements increased. In some cases, such discussions related to committee members' authorship of the DCLP.

CHAPTER III

TEACHERS' EXPERIENCES

This chapter delves into the school districts to explain how teachers come to participate in the program, how they become eligible for Career Ladder payments, and what they must do to receive the payments.

A. TEACHER PARTICIPATION

A district's decision to participate in the Career Ladder program opens opportunities for teachers to join the district's program voluntarily and become eligible for supplemental pay. Teachers must have at least five years of public school teaching experience in Missouri before becoming eligible for Career Ladder. Then, they must submit and obtain approval of a teacher Career Ladder plan. Next, they must pass an evaluation, typically by a principal, called the Performance-Based Teacher Evaluation (PBTE) and, finally, complete and document the activities specified in the plan.

1. Enrollment Process and Timeline

To be eligible for supplementary pay under the Career Ladder program, teachers in participating districts must be serving on a regular-length full-time contract and must have Missouri teacher certification; they also must formally enroll in the Career Ladder program. To enroll in Career Ladder and qualify for awards, teachers must develop a CDP that associates each Career Ladder responsibility with either the teacher's Professional Development Plan or a designated improvement plan such as the DCLP, Curriculum Development Plan, School Improvement Plan, Missouri School Improvement Plan, or some other instructional improvement. The Career Ladder Review Committee must then approve the teacher's CDP.

Teachers must submit CDPs either at the end of the school year preceding participation or at the beginning of the school year to which the plan applies.³ The Career Ladder Review Committee may ask teachers for revisions. When prompted, few of our focus group participants or district interviewees mentioned any involvement of district staff in CDP review. Most teachers felt that the enrollment process was routine, although a few mentioned difficulty with the initial process of crafting a CDP and enrolling in the program.

Forecasting the takeup and completion rate can be a challenge for some districts trying to budget for future teacher pay supplements. Partly as a way to forecast Career Ladder payments for budgeting, one district in our sample required teachers to sign an “intent to participate” form in January as a condition of participation in the program. Unfortunately, the rule proved less useful than intended because many teachers completed the form just to maintain eligibility, regardless of their true intentions. The district in question has recently reduced hours and compensation to half the state-recommended level and has instituted more stringent paperwork requirements.

2. Trends in Teacher Participation

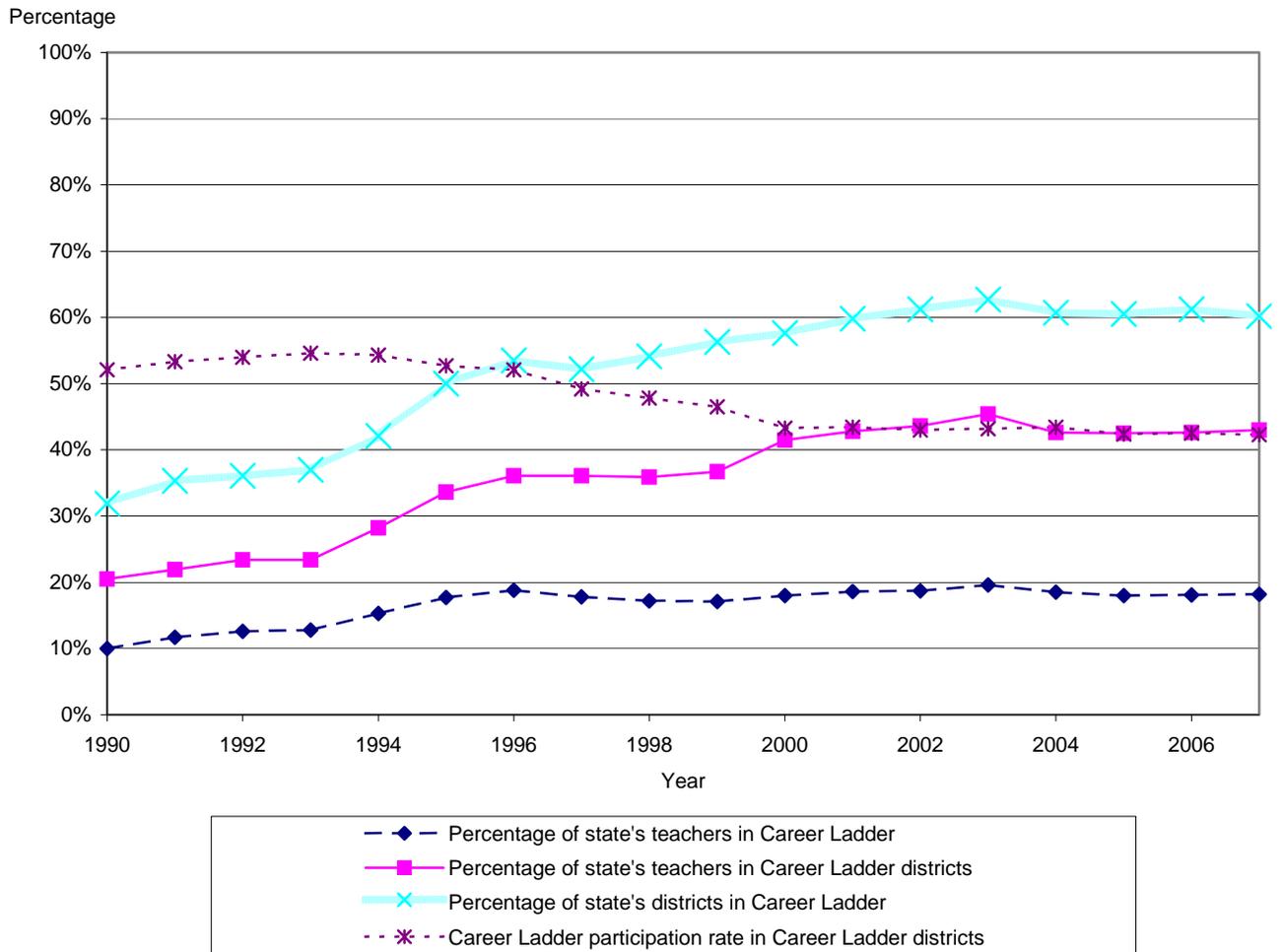
Participation by Missouri teachers in Career Ladder has been growing, though not as sharply as the rate of increase in district participation. Figure III.1 shows the rates at which district participation and teacher participation have increased. (The previous chapter discussed district participation trends). Teacher participation nearly doubled, rising from 10 percent of Missouri’s teachers in 1990 to 18 percent in 2007. The increase in both the number and size of participating districts is driving the overall growth of Career Ladder teachers. The figure shows a particularly sharp increase in the late 1990s in the number of teachers potentially eligible, that is, in participating districts. Not shown, but implied in the data, is another trend: Districts that more recently began participating in Career Ladder tend to be larger than districts already in the program. However, the take-up rate, that is, the percentage of teachers in Career Ladder districts who apply for and receive supplemental pay in the program, has been declining, from 52 percent in 1990 to 42 percent in 2007 as these larger districts have joined. This decline has been offset by a rise in the number and size of participating districts, producing overall only a slight increase in program participation.

Our analysis of administrative data on teacher receipt of Career Ladder payments from 1991 to 2007, the years for which data were available, shows that districts adhered to program rules. Fewer than 0.1 percent of teachers had been assigned to a Career Ladder stage without the statutory minimum years of experience. Table III.1 shows the percentage of participants at each stage by the experience level at which they began receiving payments at that stage. While 25 percent of participants who were ever at Stage I began that status with 5 or 6 years of experience, the rest had more experience than that when they started. The experience level among starting participants reflects the length of time needed to qualify, the possibility that the district had not been participating in Career Ladder until

³ For example, plan submission could extend from April to October 2007 for teachers interested in participating in the program during the 2007–2008 school year.

participant-teachers had already accumulated considerable experience, and the possibility that the program has attracted more experienced teachers to the district. For stage II, 79 percent had 10 or more years of experience when they started at that stage; for stage III, nearly all teachers had the required 10 years of experience.

Figure III.1. Teacher Participation Rates



We also examined the duration of each teacher's stay at a given Career Ladder stage to gauge the speed of progress through the program. Of participants who completed their careers within the 16-year period between 1991 and 2007, the average stay at stage I was 1.7 years; for stage II it was 2.1 years; for stage III, it was 5.6 years.⁴

⁴ We use those with complete careers in order to avoid undercounting stays cut off by the endpoints of the data.

Table III.1. Experience Level at Initiation of Each Career Ladder Stage

Teaching Experience	Career Ladder Stage		
	Stage I	Stage II	Stage III
Experience category (percentages)			
Fewer than 4 years	0.5	0.1	0.2
5–6 years	24.6	0.1	0.1
7–9 years	32.1	20.8	1.0
10+ years	42.9	79.0	98.7
Total	100.0	100.0	100.0
Average experience level (years)	10.9	15.2	18.6

Note: Data pertain to Career Ladder participants who began teaching in Missouri after 1990.

3. Decision to Participate: Do Districts Recruit Teachers?

Districts are not required to advertise or otherwise reach out to teachers to inform them about the program or to encourage eligible teachers to participate. Despite the state matching component for program funding, additional teacher participation represents an additional district financial burden; thus, for some districts, cost containment may be a reason to limit program outreach activities.

Districts varied in the extent to which they were active in making teachers, particularly new hires, aware of the program. Some interviewees reported that they use the program as a recruitment tool and advertise the program to potential hires, although this claim was rarely reflected in the comments of focus group participants despite our asking explicitly how the teachers had been introduced to Career Ladder and what messages they received in connection with the program. A number of focus group respondents recalled asking their prospective employer about Career Ladder opportunities when interviewing for their current position; some were Career Ladder participants in a previous district, and one was advised by her professors to ask about the program as she worked toward her education degree. A few focus group respondents questioned whether administrators, given their limited involvement with the program, could provide prospective teachers with accurate information about Career Ladder.

A consistent message from the telephone interviews with district representatives and from the in-person focus groups with teachers is that the program is largely teacher-driven; program recruitment and information provision were no exceptions. Word of mouth was perceived as a strong force in disseminating program information. Participating teachers, particularly Career Ladder committee members or “[school] building representatives” who may be responsible for handling questions, provide a large amount of program information. They are often involved in contacting eligible or newly hired teachers and informing them about the program. A number of districts make a point of mentioning the program during teacher staff meetings. Some participating teachers, particularly those involved in program oversight, encourage eligible teachers to participate; there was no indication that district

personnel encourage participation, aside from possibly advertising the program during the hiring process (as already described).

4. Decision to Participate: Why Do Teachers Participate?

Career Ladder participants mentioned additional teacher compensation as the primary motivating factor for program involvement. Many noted that the Career Ladder payment covers work or activities that teachers were already performing or would perform regardless of payment under Career Ladder (although, as required by the state, the activities must be performed outside of contracted teacher time). Some teachers noted that an additional incentive was the opportunity to perform work that they previously wanted to perform but were reluctant to undertake because of a lack of compensation. One district places a strong emphasis on student tutoring across the district, not just through the Career Ladder program. However, the average hourly wages under Career Ladder for tutoring are considerably higher than the wages paid by the district to non-participating teachers.

Except for the two districts in the state with independent pension programs, Career Ladder payments counted toward base salary for the purposes of determining defined benefit pension payments under the state's teacher pension plan. This arrangement makes Career Ladder payments further desirable, particularly for teachers close to retirement who, given experience requirements, are likely to receive the highest level of compensation under the program (discussed later).

5. Possible Barriers to Participation

Focus group participants consistently cited paperwork as a barrier to participation, particularly in some districts more than others. The basic Career Ladder paperwork can be lengthy, and the process of documenting hours, which some respondents observe as increasingly stringent in recent years, may be time-consuming. In some cases, districts' rigorous documentation requirements present an additional burden. In an attempt to document achievement growth, one district required student who were being tutored under the program to take pre- and post-tests. These fixed costs of program participation that cannot count as Career Ladder activities for the purposes of compensation lower the average compensation under the program.

B. QUALIFYING FOR AND RECEIVING AN AWARD

1. Advancement Along Career Ladder

Advancement to each of Career Ladder's three stages depends on a combination of years of teaching experience in Missouri, experience at the previous stage, and classroom performance. Table III.2 presents the state minimum qualification criteria for each stage of the career ladder. For Stages I, II, and III, respectively, the state requires 5, 7, and 10 years of teaching in Missouri public schools. The teacher must spend two years at Stage I before advancing to Stage II and three years at Stage II before advancing to Stage III. However, districts may (and, based on our interviews, do) waive most of these requirements, relying

only on experience and a single year at the previous stage. The PBTE, a statewide teacher evaluation system, measures classroom performance. Under the PBTE, an administrator rates the teacher along 20 criteria. For Career Ladder, a teacher must meet expectations in each criterion and, depending on the stage, exceed expectations on some fraction of the criteria.

Table III.2. Missouri Career Ladder, Summary of Program Features by Stage

Program Feature	Career Ladder Stage		
	I	II	III
Minimum eligibility requirements			
Experience teaching in Missouri	5 years	7 years	10 years
Experience at the previous Career Ladder stage ^a	N/A	1 year	1 year
PBTE criteria scoring expected or above ^b	100%	100%	100%
PBTE criteria scoring above expected ^b	0%	10%	15%
Minimum work requirements			
Number of Career Ladder responsibilities	2 activities	3 activities	4 activities
Hours of work (minimum)	60 hours	90 hours	120 hours
Bonus Payments			
Maximum bonus amount	\$1,500	\$3,000	\$5,000
Implied hourly rate (maximum bonus/minimum hours)	\$25.00/hour	\$33.33/hour	\$41.67/hour

Notes:

^aMinimum years at previous stages for Stages II and III are 2 and 3 years, respectively, but waivers are offered for teachers with 7 and 10 years of experience, respectively. Given that those experience levels are already minimums for each stage, the waivers would be the norm.

^bPBTE stands for Performance-Based Teacher Evaluation.

Teachers with National Board Certification (NBC), a voluntary advanced teaching credential offered by the National Board for Professional Teaching Standards, are automatically eligible to receive compensation under Stage III without any extra work. If a district does not participate in Career Ladder, an NBC teacher may petition the district to participate on a limited basis so that he or she may receive Career Ladder Stage III compensation.

At their discretion, districts may enact additional requirements at each stage per DESE regulations. Districts in our sample did so in a number of cases; some districts required teachers to complete graduate coursework at all stages or to work toward or attain a master's degree in order to move to Stage III. One district required one year of instruction in the district before participation regardless of any previous experience. Another district enacted more stringent requirements for performance on the PBTE. Districts also lowered requirements in several cases, specifically in terms of years of experience. Two districts

allowed teachers to waive one or more years of participation at Stage I or II if they possessed the requisite years of overall teaching experience either in Missouri or in general.

2. The Performance-Based Teacher Evaluation

Teacher performance, as measured by the PBTE, is an important component of Career Ladder, at least as designed by the state. In practice, the influence of performance evaluations on Career Ladder eligibility and advancement depends on the district and school principal.

The PBTE is designed to provide administrators and teachers with information and feedback regarding teaching competence and to help teachers improve on a continuing basis. Teachers in each district are rated on 20 criteria spanning the following six areas: (1) engaging students in class, (2) correctly assessing students, (3) exhibiting content knowledge, (4) professionalism in the school, (5) participation in professional development, and (6) adherence to the district's education mission.

As applied to Career Ladder, each eligible teacher must show evidence of performance at or above the expected level on each of the 20 rating criteria in order to maintain program eligibility. DESE regulations stipulate that qualification for Stages II and III must also involve performance above the expected level on 10 and 15 percent of the criteria, respectively, on the most recent PBTE. In addition, state guidelines for the program require DCLP to outline procedures for PBTE evaluator training, covering all of the main areas of the PBTE as well as consistency and reliability among evaluators.

Districts may, at their discretion, enact additional requirements at each stage, as provided under DESE regulations. Regarding the PBTE, one district in our sample required teachers to achieve a higher percentage of evaluation criteria above the expected level in order for teachers to qualify for Stages II and III (15 and 35 percent, respectively).

In the absence of a direct linkage between the evaluation ratings and student achievement, the PBTE guidelines and process represent an attempt to formalize what is inherently a subjective activity. The frequency of the evaluation process varies by teacher experience; non-tenured teachers are subject to annual reviews, whereas tenured teachers are reviewed on a five-year cycle. Teachers attain tenure after five years of teaching; accordingly, the evaluation process as applied to tenured teachers is the only one applicable to Career Ladder participants. According to the PBTE guidelines, all teachers should participate annually in professional development activities.

For tenured teachers, the evaluation process involves a minimum of one scheduled and one unscheduled classroom observation, along with professional development documents, work sampling (such as lesson plans), drop-in observations (shorter, more informal visits than classroom observations), and other materials such as lesson plans, with all data collected for the evaluation recorded and filed. An administrators meets with the teacher before (in the case of scheduled observations) and after observations. The administrator then develops a formal report that incorporates all data collected during the evaluation process and outlines the teacher's performance in relation to PBTE standards and criteria.

Districts are directed to develop a formal review and appeal process. The evaluation is designed to be ongoing throughout the school year, with periodic progress evaluations and criteria assessment.

The state PBTE materials represent guidelines for districts, not a formal mandate. Most districts we contacted, however, used the state forms and guidelines, with some notable variation and with one exception. The majority of respondents indicated that tenured teachers complete the PBTE every three years as opposed to every five years. Even though the DESE guidelines stipulate that PBTE performance should be measured from the most recent final evaluation for the PBTE, some indicated that teachers would need to undergo a formal evaluation if they planned to qualify for or advance in Career Ladder in the following year.

Both focus group participants and district interviewees frequently mentioned collaboration with administrators on PBTE components that influence Career Ladder eligibility or advancement. Some teachers told us they chose when the scheduled observation would occur and what lesson content would be observed. Some also stated that they suggested or identified areas in which they thought they would or should achieve a rating of above the expected level. District interviewees mentioned a number of accommodations for Career Ladder teachers; one refrain was that administrators wanted to avoid confrontations over PBTE ratings and thus would ensure that Career Ladder teachers met benchmarks for advancement, sometimes by correcting a poor evaluation or completing the PBTE with an eye toward the list of Career Ladder participants. However, some respondents cited a more pro-active approach of addressing problems before any conflict arose over Career Ladder eligibility.

According to focus group participants, administrators did not apply the PBTE guidelines uniformly. Teachers raised the concern that administrators' personal opinions about teachers could affect ratings. For example, teachers' accounts of their administrators' definitions of and approaches to the "above expected" level varied considerably between districts; some respondents were told by administrators that the rating pertained only to exemplary work while other administrators rated all teachers above the expected level. One teacher said, "I've known administrators to hold [the evaluation rating] over people's heads." Another said, "I think [the administrator] knows if you're doing your job, and your evaluations have been fine they just sign off on it and assume you're good to go for Career Ladder."

We also discovered examples of lax or nonexistent adherence to the state guidelines on the PBTE. One district in our sample stopped following the state PBTE guidelines several years ago according to our interview respondent. Instead, the school administrator simply recommends and approves teachers for Career Ladder participation.

3. Award Levels

State guidelines set a maximum level of compensation under Career Ladder: \$1,500 for Stage I, \$3,000 for Stage II, and \$5,000 for Stage III. Districts may designate payment

amounts lower than the state guidelines; however, “each stage shall contain responsibilities commensurate and adjustable to the compensation offered for that stage.” Therefore, the level of effort for each stage in terms of hours of work must be proportionally adjusted to reflect payment amounts lower than the state maximums. Districts may offer more than the state maximums, with the district paying 100 percent of the amount over the state maximum.

Among the districts we studied, the timing of payments to teachers varied. State payments to districts are made on July 20 as part of the normal disbursement to local districts of state education funds earmarked to underwrite Career Ladder activities from the preceding school year.⁵ Some districts distribute the state and local portions of the teacher bonuses separately, with the district-funded portion paid before July 20; other districts make one lump payment to participating teachers, sometimes before receiving payment from the state on July 20.

The compensation for each stage under the program has not been revised since the original authorizing legislation took effect in the 1986–1987 school year. As a result, the real value of the benefits has steadily eroded due to inflation. For example, the maximum payout of \$5,000 had the same purchasing power in 2007 as \$2,683 in 1987, a reduction in value of 54 percent.⁶

4. Work Hour Requirements

Each Career Ladder stage involves a prescribed minimum number of work hours that correspond to the maximum payment amounts previously described. The amounts are 60, 90, or 120 hours for Stage I, II, or III, respectively. For the 2006–2007 school year, the average number of hours spent for Stage I, II, and III teachers was 79, 109, and 144, respectively.⁷ The hours correspond, assuming maximum compensation under the law, to supplementary pay of approximately \$19, \$28, and \$35 per hour, respectively.

As of May 1 of each year, teachers may start logging hours for the next school year, although districts may amend activity start and end dates within this framework. In some cases, the date after which a teacher may start completing hours will fall ahead of the deadline for submitting a CDP, particularly in districts that require the CDP at the start of the school year. Nominally, under DESE regulations, teachers may not start logging hours for the next school year until they have completed all their previous year’s activities, including the Career Ladder Review Committee’s documentation review.⁸

⁵ Rule 5 CSR 80-850.030 § 8.

⁶ We used the consumer price index for urban consumers nationally. The U.S. Department of Labor does not publish a reliable rural price index based on goods purchased in Missouri over the same 20-year period.

⁷ Missouri Career Ladder Annual Report 2006–2007, DESE.

⁸ Career Ladder Frequently Asked Questions, DESE.

5. Activities Under Career Ladder

To be allowable under Career Ladder, activities performed by teachers must align with what the district has outlined as acceptable activities in its DCLP. A DCLP generally outlines the percentage of time to be devoted to student contact, allowable credit amounts for professional development activities, and hour limits for particular activities; it also prescribes methods for documentation. Some districts may emphasize certain types of responsibilities. In general, though, most plans appear to be relatively similar, closely following DESE's model career plan.

As with increasing requirements for performance under the PBTE, each successive Career Ladder stage incorporates a greater number of types of responsibilities or activities (two, three, or four activities for Stage I, II, or III, respectively). The requirements ensure that teachers expand and diversify the types of work they perform under Career Ladder as they progress in the program. DESE also recommends that districts set hour limits on certain activities that can easily extend into a commitment of time that, after a point, does not directly benefit students, such as Internet research or professional reading. All activities must be co-curricular in nature and related to existing priorities as outlined in district or teacher curriculum, development, or improvement plans.

Teachers must submit documentation of their Career Ladder activities to the Career Ladder Review Committee for verification and subsequent payment approval. The committee must compare teacher activity to the requirements of the teacher's stage and the activities outlined in the teacher's CDP. Almost all Career Ladder teachers receive their supplementary pay. Some respondents mentioned that committees have recently become more stringent in their requirements for documenting activities under Career Ladder. Many also noted that the state and/or district had recently moved to target more narrowly allowable activities under Career Ladder in order to focus more sharply on student achievement.

Some districts allow teachers to amend their plans during the school year if responsibilities or overall activity levels change; in theory at least, teachers may change stages during the year and/or may reapportion the responsibilities they outlined on their CDP to reflect activities completed.

According to focus group members and interview respondents, school districts placed emphasis on activities involving student contact; in fact, DESE recommends but does not mandate that one-third of time spent on Career Ladder should involve direct contact with students. Respondents mentioned tutoring as their primary Career Ladder work and frequently noted student clubs and enrichment activities. Other, slightly less frequent activities included workshop attendance, serving on various committees, and curriculum development. Respondents also mentioned professional development, particularly in districts with graduate hour or degree requirements. One district interviewee mentioned that its tutoring requirements provided a way to help fund tutoring activities mandated under No Child Left Behind.

CHAPTER IV

POSSIBLE EFFECTS OF CAREER LADDER

Once basic program operations are understood, it is natural to seek answers about what type of impacts Career Ladder might have had on students and teachers. This chapter reports on teachers' perceptions of the likely consequences of Career Ladder. It does not present estimates of program impacts based on objective data, although we did ask teachers in focus groups to be candid about whether and how they thought the program made a difference. We wanted to understand possible mechanisms by which the program might lead to positive (or unintended negative) outcomes.

A. DIRECT EFFECTS ON STUDENTS

Not surprisingly, focus group participants were confident that Career Ladder had considerable benefits for students. The main perceived benefit was improved student achievement. Their comments suggested that the program can raise student achievement through a combination of at least two possible routes. The most direct route is through Career Ladder activities themselves, principally tutoring, helping students learn. Regardless of whether the content of the tutoring promotes learning during the sessions, teachers reported that the time they spent with students outside of regular classroom hours was a useful way to become better acquainted with student needs and interests, making participant-teachers more effective with those students during the regular school day. Several teachers believed that the program disproportionately benefits at-risk students, who may be more likely to avail themselves of after-school activities such as tutoring and clubs.

Teachers in Career Ladder districts spent time in activities that they believed were productive; of course, even worthwhile activities do not guarantee a positive impact on students. The *net impact* that is most relevant for policymaking is the difference between the outcomes under Career Ladder and those that would have been realized in the absence of the program. According to DESE regulations, acceptable responsibilities are those that “exceed the norm for the profession;”⁹ that is, activities must take place outside of participants' contracted time such that, according to statute, Career Ladder activities must

⁹ Career Ladder Frequently Asked Questions, DESE.

not be part of a teacher's normal responsibilities. Does the availability of payments to teachers under the program lead to new activity, or would teachers undertake new activities even in the absence of the program?

Career Ladder teachers who participated in each of the focus groups stated that the program's primary purpose was to compensate teachers for work they were already performing or would otherwise perform. In other words, participants suggested that the activities they performed under Career Ladder were activities that they would have undertaken even if they had not been in the program. They perceived Career Ladder as simply a salary increase. If that were the case for all teachers and all activities, then the program would be expected to have no direct impact at all, although it could produce indirect impacts, as discussed below, resulting from the beneficial effects of higher salaries. In fact, one district administrator we interviewed for the study described the development of a "Career Ladder mentality" among participating teachers as a hidden cost of the program. He felt that teachers often would not perform activities that did not count toward their Career Ladder hours whereas they might have performed them before introduction of Career Ladder.

Focus group respondents said that they had no difficulty in meeting the hour requirements under Stage I but found the hour requirements under Stages II and III challenging. Furthermore, given that the number of responsibilities assumed by teachers increased with each stage, teachers had to diversify the types of activities they conducted as they progressed through the program. Some teachers already meeting the Stage III hour requirements but not yet on that stage because they had not qualified on other measures, had to think of still other ways to diversify their activities to progress to that stage.

Some teachers did mention activities that, in their opinion, would not take place without compensation under Career Ladder, such as extended enrichment activities that occur after the end of the school year. Many also observed that the amount of tutoring and number of after-school clubs had increased as a result of Career Ladder. Several focus group respondents reported that the work under Career Ladder represented a combination of old and new activities. Therefore, it would seem that, even though the program primarily compensates teachers for activities that many might otherwise perform, the aggregate amount of work completed by participating teachers may have increased; in fact, some activities, particularly the more atypical or burdensome programs such as summer enrichment, would probably not have taken place if not for Career Ladder. Further research using more systematic sampling and measurement is needed in order to make generalizable statements about the amount of work completed by Career Ladder participants.

B. INDIRECT EFFECTS

Regardless of whether the Career Ladder activities had direct impacts on student achievement, the program may produce beneficial impacts through two indirect routes. One is by making teachers better at what they do. We refer to this as a productivity effect. The other is by improving the average quality of teachers in the district through recruitment and retention. We refer to this as a composition effect.

As for the productivity effect, teachers reported that the quality of their teaching improved as they acquired new skills and undertook professional development, particularly in districts that required graduate school hours for program participation. Few, if any, however, mentioned any impact of curriculum development or improvements in course content, which are areas that Career Ladder is ostensibly designed to target.

1. Effects on Teacher Career Decisions

The other indirect route for Career Ladder to improve teaching and learning is through the composition effect, whereby good teachers are more likely to enter and remain in participating districts. Retention effects are likely to arise through increased teacher morale and job satisfaction. Most participants we spoke with said that the program improves teacher satisfaction, partly because of the increased compensation. Some participants said that the program activities increased their connection with students. Many thought that they learned and grew from the professional development process and, in some cases, from the other activities as well. They also mentioned improved staff cohesion as benefits.

Few of the focus group participants that we asked said that Career Ladder had any impact on their decision to remain in the teaching profession. Most felt that Career Ladder's compensation was too low to have any effect. Others stated that they intrinsically enjoyed teaching and that additional compensation was not a factor in their overall career path.

Participants more commonly said that Career Ladder affected their decisions about *where* to teach. Several long-serving teachers explained that the lack of Career Ladder in a neighboring district was a factor in their decision not to transfer. Newer teachers (to either the profession or the district) also offered stories suggesting a positive recruitment effect. A few teachers said that they learned of the program during the interview process, and others who were aware of the program made a point of asking about it when they were making employment decisions.

District interviewees cited retention effects, along with increases in student achievement, as program benefits. The district staff interviewed for the study outlined benefits similar to those cited by the teachers in focus groups. They viewed increased compensation and teacher satisfaction as resulting in improved teacher retention.

CHAPTER V

CONCLUSIONS

This report set out to profile the Missouri Career Ladder program by delving beneath the surface and comparing how the program works in practice (based on stakeholder accounts) with how it works in theory (based on published statutes and regulations). We found that in many respects the program operates as one might expect. Districts implement rules that tend to follow the state guidelines, with some local tailoring. Teachers of a given experience level must perform a set of allowed activities in order to receive payments at one of the three Career Ladder levels.

While Career Ladder provided opportunities to supplement salaries by offering extra pay for extra work, in most cases it would not qualify as a performance incentive program for teachers. The use of an evaluation tool (the PBTE) to promote teachers along the career ladder suggests that it should provide incentives for teachers to improve their practice. However, we found little evidence that the PBTE is applied rigorously or implemented uniformly in a way that would motivate teachers to raise their performance. Instead, Career Ladder payments were seen as a reward for longevity and completion (with documentation) of a set of allowable activities such as tutoring, after-school activities, or approved professional development.

We also sought to explain how districts and teachers came to be in the program. We found that district size matters. We documented the preponderance of small districts, which happen to be rural and poor, in the program despite the rise over time in the participation rates for medium and large districts. Larger districts in particular had low takeup rates, i.e. a low percentage of teachers who had submitted a Career Ladder Plan and received Career Ladder payments. A possible explanation for low takeup rates within a participating district might relate to the generosity of the program; Career Ladder benefits have lost nearly half of their value to inflation. In the large cities of St. Louis and Kansas City, where the benefits do not count toward retirement pay, the incentive is even weaker. Thus the levels may not be high enough for many teachers to justify completing the individual plans. Another obvious explanation would be related to years of experience and eligibility. Some districts may be eager to help their first-, second-, and third-year teachers, but the Career Ladder program does not apply to these early career teachers, since they would not have qualified.

Finally, a goal of the analysis was to identify the mechanisms by which Career Ladder might produce positive impacts. We identified plausible routes whereby the program could raise student achievement, improve teacher satisfaction/morale, and improve teaching via productivity and composition effects. Teachers reported that they get to know their students better as a result of tutoring them outside of class. They also reported that a district's participation in Career Ladder might influence them to choose to teach in that district over another district that did not have the program.

The activities that teachers in engage in, such as professional development workshops and student clubs, may be productive in terms of improving teaching and learning. However, there is reason to believe that the net impacts would be small as well. For example, several teachers confided to us that the activities performed under Career Ladder, at least those most commonly performed for Stage I, are similar to what the teacher would be doing regardless of the program.

Ultimately, the question of impact is an empirical one, which can and should be answered using the most rigorous quantitative methods available. The companion reports by Booker and Glazerman (2008a; 2008b) attempt to answer these questions about impact, albeit using existing data and relying on statistical adjustment to generate valid inferences about impacts. Nevertheless, the current report and its companions go a long way toward describing the Missouri Career Ladder and setting the stage for discussions of policy changes and for further research.

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APPENDIX A

DATA AND METHODS

For this report we consulted existing documents and collected primary data. The existing documents included state legislation, rules and regulations issued by DESE, and district-level documents such as District Career Ladder Plans, many of which are available on school district Web sites. Additional data for the study came from focus groups with Career Ladder teachers and structured interviews with district program administrators, state policymakers, and stakeholders. We also analyzed a longitudinal database on teacher and district participation in Career Ladder that we compiled from data provided by DESE.

A. PROGRAM DOCUMENTS AND ADMINISTRATIVE DATA

The first step in our study of the Career Ladder program was to review the state materials and legislation governing the program's operations and structure. The Career Ladder was first introduced in 1985 as part of the Missouri Excellence in Education Act, known as House Bill 463 and implemented in the following year. The program underwent some significant changes in 1996 under Missouri Senate Bill 795. We reviewed the text of both laws to describe the historical changes in the program, particularly as related to its funding structure. We also examined DESE's program rules delineated in the Missouri Code of State Regulations. The regulations provide additional guidance for districts interested in participating in the program, particularly in areas not addressed by the legislature, and set a timeline for the application process.

DESE publications are an additional source of useful program information. One such resource is a District Career Ladder Plan that DESE is required by state statute to provide as a template for local districts. These and other materials are available online. Web resources also include guidelines for teachers and districts, Career Ladder "frequently asked questions", sample program forms, a list of activities inappropriate for Career Ladder, and web-based Career Ladder reporting forms for teachers and districts.

DESE also provided us with electronic files that we used to construct longitudinal databases that proved useful in several ways. For example, we used data on district participation patterns and other characteristics to draw samples of districts for the focus

groups and telephone interviews. We also analyzed the state databases to measure district and teacher participation rates and trends over time.

B. INTERVIEWS

We selected a random sample of school districts in which to conduct telephone interviews that were aimed at providing the district perspective on the operation of the Career Ladder program and the district decision to participate (or end participation) in the program.

1. District Selection

We identified 16 school districts in which to conduct interviews, 15 of which had been participating in Career Ladder during the 2006–2007 school year and one drawn from a list of school districts that had ceased program participation within the last four years. We stratified the sample in several ways.

First, we divided the districts on the basis of their Career Ladder participation history:

Recent Entrants: Districts that began participating in Career Ladder during the 1999–2000 school year or thereafter. One of our goals for the study was to understand why districts participate in the program; recent entrants to the program would be best positioned to provide us with such information. We selected four districts from the cluster of recent entrants.

Long-Term Participants: Districts that had participated continuously since the 1995–1996 school year. The continuation of participation is another question of interest, and long-term participants appeared most able to provide relevant information. Operations in these districts may have settled into a predictable pattern, providing a more accurate picture of resulting program characteristics. Initially, we sampled 10 districts from this group.

Second, we stratified by urbanicity by using the National Center for Education Statistics locale codes from the Common Core of Data. Such stratification promised representation from all urbanicity categories, ensuring that we would capture variations in Career Ladder operations in different types of districts in terms of matching rates. The standard measure of urbanicity is also based on the size of the locality and thus was highly correlated with district size (e.g., enrollment). Therefore, we did not need to stratify explicitly on district size. The stratum (group) definitions were:

1. Large city
2. Medium-sized city, urban fringe of medium-sized city, urban fringe of large city
3. Large town, small town, rural

The two district types and three urbanicity categories define six possible combinations. We randomly selected districts within each of the combinations in order to get a diversity of districts and then added two more districts based on their participation patterns:

Districts with Odd Participation Patterns: Districts with an unusual or unexpected distribution of teachers across stages were of interest because such districts may provide insight into program adaptations. In the case we examined, approximately 98 percent of teachers were in Stage III of the program.

Recent Leavers: Districts that ceased participating in the program since the 2002–2003 school year were of interest. We randomly selected one such district, which had stopped participating in Career Ladder after the 2004–2005 school year.

For each district, we identified one or two potentially knowledgeable respondents. Although we initially expected that interviewees would be district administrators, we were directed in most cases to the teachers responsible for overseeing the program through their work on the Career Ladder Review Committee.

We tailored the interview protocol (shown in Appendix B) to each type of district. For example, we asked staff from districts that had recently left the program about why they ended their participation. We also divided interviewees into two categories: those with knowledge of current program operations (e.g., staff who currently oversee the program) and those with historical knowledge of the district’s decision to participate. In some cases, one individual fit both categories. In other cases, we conducted two or three interviews in the same district.

2. Completion Rates

We completed interviews with program administrators from 13 of the 16 districts we selected (82 percent); we also completed two state-level interviews. One rural district declined participation in both the district interviews and the focus group. We interviewed more than one respondent in several districts. The result was 23 completed interviews: 6 districts in which we interviewed one person, 6 districts in which we interviewed two people, one in which we interviewed three people, one interview with a state union leader, and one interview with a DESE official.

C. TEACHER FOCUS GROUPS

To gain teacher perspectives on the program, we conducted four focus groups with Career Ladder participants, each in a separate type of school district defined by district size and urbanicity. Teacher focus groups were designed to help us understand teachers’ decisions to participate in Career Ladder, the incentives offered by the program, and teachers’ general experience with and attitudes toward the program.

1. Site selection

From among the initial sample of interview districts, we selected four school districts for a focus group with participating teachers.¹⁰ To ensure a diversity of opinions and viewpoints, we stratified districts by size and urbanicity, following a method similar to that used for the district interviews. We divided districts into categories of large urban, suburban, and rural. We restricted the potential rural districts to those with district enrollment greater than 300 students, thereby ensuring enough potential participants to make focus group recruitment feasible.¹¹

With only one large urban district in our sample, we selected that district with certainty. To address logistical and cost concerns, we restricted the choice of a suburban district to be among the three five districts sampled in close proximity to the large urban district already selected and then randomly selected a suburban district from among this subsample. We initially selected two rural districts at random from among the sample of interview districts. As noted, one of the districts declined to participate in either the district interview or the focus group. Subsequently, we selected a replacement rural district at random from the district interview sample.

2. Recruitment and Completion

To recruit teachers for the focus groups, we used lists of participating teachers obtained from the selected districts. We stratified and randomly selected participating teachers along two dimensions: Career Ladder stage (I, II, or III) and grade level of instruction (elementary, middle, or high school). Hence, we had nine selection bins and drew an initial sample of two teachers from each bin. In one case, we released an additional recruitment sample as necessary.

We vigorously recruited focus group members, producing a sample that was diverse with respect to all grade levels, years of experience, and Career Ladder stage. Respondents received a \$40 incentive payment. Each focus group lasted about 90 minutes, followed an identical protocol, and included an average of almost eight respondents. The protocol is shown in Appendix C. The average experience level across all focus group participants was 15 years, ranging from 7 to 29 years. Of those whose Career Ladder stage we could identify, 23 percent were at Stage I, 46 percent at Stage II, and 31 percent at Stage 3.

¹⁰ Because we sought input from current participants in all stages of the Career Ladder, we excluded the district that recently left Career Ladder and the district with nearly all of its teachers in Stage III of the program.

¹¹ This restriction removed three rural districts from our pool of potential focus group districts.

APPENDIX B

**PROTOCOL FOR DISTRICT-LEVEL
INTERVIEWS**

SCREENING QUESTIONS:

- In what capacity are you involved with the Career Ladder?
- How long have you been so involved?
- What other staff members at the district (and/or teachers) are involved with the program?
- [At this point, can direct person appropriately to the different portions, and/or ask for additional contact information].

To streamline interviews, obtain and review the district's District Career Ladder Plan before calling the district.

SHORT-FORM INTERVIEWS

If district is long-term participant, complete section A.

If district is a recent Career Ladder program entrant, complete section B.

If district is a recent leaver, complete section C.

A. LONG-TERM PARTICIPANTS

The two interview sections may require two respondents, unless the person who currently oversees the program was involved with the initial participation decision. If this is not the case, then the interviewer needs to be directed to someone who was involved with the initial participation decision to administer section (b). As you

will note, there is overlap between the sections. If one person is completing both sections, adjust as necessary.

a. Current Implementation Status

1. What factors were involved in your district's decision to participate in the Career Ladder program?
2. Has the district experienced any benefits from participation in terms of student achievement or teacher retention? Have there been any other benefits? [Probe: If respondent unsure, then say: Such as teacher performance or satisfaction?] Have there been any drawbacks? Is this based on anecdotal, qualitative, or quantitative evidence?
3. Why does the district continue to participate? Does the district reevaluate its participation in the program? If yes, how often? [Probe: Are there mandated frequencies? Are there triggers (match rate change, budgetary issues, student achievement) in this regard?] If no, any particular reason why?
4. The state guidelines provide districts some leeway in a number of areas [Probe: Such as how teachers advance, compensation levels, etc.] How has the district adapted the program to better fit its needs?
5. What types of staff or individuals are involved in the operation of the career ladder?
6. Has participating been a largely positive or negative experiences? What do you see as the good or bad features of the program?

b. Historical Factors/Participation Decision

1. What factors were involved in your district's decision to participate in the Career Ladder program?
2. What benefits did the district expect to realize when it decided to participate? Did the district expect any benefits in terms of: teacher performance, student achievement, teacher retention, or teacher satisfaction?
3. Starting in the 1996-1997 school year, the state matching formula for the Career Ladder program changed. What impact, if any, did the change in match rates have on your district's level of funding contribution? Did this change force your district to reevaluate its participation decision? Why or why not?
4. Has participating been a largely positive or negative experiences? What do you see as the good or bad features of the program?

B. RECENT ENTRANTS

All of the “Recent Entrants” entered the program in 2000 or later. As such, the person who currently oversees the program may or may not have been involved with the initial participation decision. The interviewer must determine whether this is the case. If so, then both parts (a) and (b) can be administered to this person. If not, then the interviewer needs to be directed to someone who was involved with the initial participation decision to administer section (b). There is overlap between the sections. If one person is completing both sections, adjust as necessary.

a. Current Implementation Status

1. What factors were involved in your district’s decision to participate in the Career Ladder program?
2. Has the district experienced any benefits from participation in terms of student achievement or teacher retention? Have there been any other benefits? [Probe: If respondent unsure, then say: Such as teacher performance or satisfaction?] Have there been any drawbacks? Is this based on anecdotal, qualitative, or quantitative evidence?
3. Why does the district continue to participate? Does the district reevaluate its participation in the program? If yes, how often? [Probe: Are there mandated frequencies? Are there triggers (match rate change, budgetary issues, student achievement) in this regard?] If no, any particular reason why?
4. Has participating been a largely positive or negative experiences? What do you see as the good or bad features of the program?

b. Historical Factors / Participation Decision

1. Why did the district decide to *begin* participating in the Career Ladder in Year XXXX? [Probe: Teacher interest, availability of funds, expected benefits?]
2. What benefits did the district expect to realize when it decided to participate? Did the district expect any benefits in terms of: teacher performance, student achievement, teacher retention, or teacher satisfaction?
3. Can you describe what events occurred along the way, between the decision to participate and implementing the program? Were there any particular individuals or groups that were clear drivers in the decision to participate, the planning process, and implementation?
4. Legislation passed, starting with the 1996-1997 school year, which affected the program match rates for districts. Did this change in match rates have an impact on the district’s decision to participate?

5. Was the process of creating the District Career Ladder Plan easy or difficult? What level of guidance did you receive from the state? Is there any leeway provided in the process?
6. What have been the reactions of staff to the institution of the program? [Probe: if unsure of levels, specify at the district, school, and classroom levels].
7. Has participating been a largely positive or negative experiences? What do you see as the good or bad features of the program?

C. RECENT LEAVERS

For this interview section, it will likely be more difficult to identify the correct initial respondent. For the recent leaver district that has not reentered the program, we may have to simply ask who previously oversaw the Career Ladder program

1. Why did the district decide to *cease* participating in the Career Ladder in Year XXXX? [Probe: If unsure, ask: What were the primary factors behind the decision? Costs, dissatisfaction, etc.?
2. Were there any particular individuals or groups that were clear drivers in the decision? Did complaints move up the school hierarchy or was it largely a district decision?
3. Can you provide a timeline of the decision process leading up to exiting the program?
4. Did the district realize any benefits from the program while it was participating?
5. *2007 re-entrant:* At the time you left the program, did you expect to return to the program in a certain number of years? What factors were involved in these decisions?

D. DISTRICTS WITH ODD PARTICIPATION PATTERNS

1. How does the Career Ladder operate in your district? How does the district use the flexibility provided by the state? How is your program unique? Can you give an outline of the processes and decision makers involved?
2. It appears that ALMOST ALL participating teachers in your district are at Stage 3. Why is this the case? [Note: If all teachers at Stage 3, ask whether this is due to the Stage 1 and 2 exemption for teachers with National Board Certifications].
3. [If not due to National Board Certification issue]: Do you explicitly limit the program to certain teachers, or only publicize for certain groups of teachers?

LONG-FORM INTERVIEW

Note: Some of these questions may arise in some of the short form interviews, and in those cases we will omit from this script. Those instances are noted as needed.

A. TEACHER QUESTIONS

1. What are the rules for teacher eligibility; is there anything in place aside from the state guidelines?
2. Does the district/schools publicize the program? E.g. do they actively encourage teachers to participate or provide information about the program? Has the state undertaken any such activities?
3. Is the program competitive, either to become a Career Ladder teacher or to move up Stages?
4. Are there barriers to participation for teachers, besides those explicitly outlined by the state? [Probe: such as: long application forms, review of their submitted documents, etc.]
5. Is there any aging out of the program? For example, after a certain amount of time at Stage 3, do teachers have to leave the program?
6. How often do teachers fail to meet the criteria outlined for their Career Ladder stage, or in their individual Career Development Plan? What possible reasons are there for this (certification, failing to meet hour requirement, etc.)?
7. What is your perception of why teachers enter or leave the program?

B. PERFORMANCE-BASED TEACHER EVALUATION

1. Can you describe how the PBTE process operates in the district? Is there any possible variation between schools in how it operates?
2. What, for your district, is the relationship between the PBTE and the MCL? [Note: for long-term participants, we have the District Career Ladder Plan]. [Possible probe: Has the intersection of the PBTE and the achievement of MCL stage requirements created tension between administrative staff and participating teachers?]

C. FINANCES

1. What is your impression of the bonus levels as they are currently set? [Probe: Levels are \$1500, \$3000, and \$5000]. When Career Ladder funds were part of the school foundation formula (i.e. basic school aid), and the legislature did not

fully fund the formula, did you reduce Career Ladder payments accordingly or obtain funds to make up the difference?

2. When are monies distributed to teachers? Upon proof of successful completion? Mid-year? Beginning of the school year?
3. Have taxes been levied (as allowed for under the law) to raise money for the Career Ladder Program?
4. Does the MCL payment count towards teacher salary for the purposes of determining defined benefit pension payments? [Note: KC operates independent pension plan]
5. The 1996 legislative change stipulated that the district would have to provide the 1995-1996 matching level for teachers who participated during 1995-1996 and continued to participate in the program. Has this had any significant effect for the district?
6. A 1996 legislative change equalized payments for teachers within each stage across districts. This meant that all teachers in the district on the same Career Ladder stage received the same amount of award. Did this have any effect on teacher participation in the program? Did this change mean that there was any true practical change in the payments to teachers? [Only ask: if at district and involved in MCL since 1996 legislation change]

D. CAREER LADDER COMMITTEE AND PLAN

1. Can you give a description of the activities that the Career Ladder committee is involved in on a regular basis? [Note: Ask interviewee if they have any documents that they can share].
2. What is relationship between the local Career Ladder committee and the school board?
3. How are teachers chosen to sit on the committee?
4. What amount of leeway is given by the state in crafting the District Career Ladder Plan? What is your impression of the creation process, i.e. difficult, easy? [Note: Asked in the recent entrants interview]
5. Did the state provide you with a model career ladder plan as an example?
6. Have yourself and/or other staff attended any workshops or other events concerning the Career Ladder program? Does the state or any other entity provide technical assistance or other types of guidance?

APPENDIX C

FOCUS GROUP PROTOCOL

A. INTRODUCTION

My name is Tim Silman and I work for Mathematica Policy Research. Mathematica, an independent policy research firm with extensive experience in conducting education research. We have received a grant from the Ewing Marion Kauffman Foundation of Kansas City to conduct a study of the Missouri Career Ladder program. We are interested in learning more about the program and about your experiences as participants. This discussion is your chance to let us know how the program really works and how it relates to your career as a teacher.

PRIVACY: Everything you say here is private. We will not release any information that could be used to identify you. No individual staff member will be quoted by name. Our report will describe the range of views expressed by teachers across districts, but specific comments will not be attributed to specific individuals or districts. We hope that this will let you be as candid as possible in expressing your opinions.

CONFIRM DURATION OF THE FOCUS GROUP: 75-90 minutes

MECHANICS OF TAPING: I am taping our discussion so that I can focus on the conversation now and write notes later. No one outside of our research team will have access to the tape. It will be helpful if you speak up, speak clearly, and speak one at a time.

ROLE OF THE MODERATOR: I'm going to lead the discussion. We have a number of topics to discuss during the time we have for this discussion. At times, I may need to move the conversation along to be sure we cover everything.

There are no right or wrong answers. People may disagree, and that's okay. Please feel free to offer your opinions, whether positive or negative.

PARTICIPANT INTRODUCTIONS: To get started, please introduce yourself by telling me:

1. Your first name
2. What grade and subject you teach
3. How long you have been teaching; in total, in MO, and in the district
4. Your Career Ladder stage or level

B. PROGRAM PARTICIPATION

1. How did you first hear about the Career Ladder program?

Did anyone in your school or the district encourage you to participate in the Career Ladder? How did they encourage you?

How is the program marketed or advertised to teachers? To current teachers or prospective teachers? By subject or grade level, or on an individual basis?

2. Why did you decide to participate in the Career Ladder? What factors did you consider when making your decision?

PROBES:

The level of compensation?

The amount and type of additional responsibilities?

Something else?

3. [For teachers who started participating at some point after the program was implemented]: Was the Career Ladder program something you were aware of prior to meeting the eligibility requirements?

IF YES:

Did it influence your decision to stay within the district?

Or to move to a participating district?

4. Is the number of slots in the program in any way limited? Or can any teacher that meets the requirements participate? [COMPETITIVE?]
5. Why do you feel that eligible teachers do not or would not participate in the program?
6. The [Name] district has been participating in the program since XXXX. Were teachers, yourselves included, involved in any way with the district's decision to participate?

IF YES:

How, or in what ways?

C. CAREER LADDER COMMITTEE AND PLANS

1. Can you provide an outline or timeline of the Career Ladder application process?

Does the first year process differ significantly from that in later years?

What do you think about the application process? Easy? Difficult? Quick? Lengthy?

2. Tell me about your interactions with the Career Ladder committee.

PROBES:

How often are you in contact with the committee?

Is the committee only involved with reviewing individual career ladder plans? Or do they perform other functions?

3. How are teacher representatives chosen for the Career Ladder committee?
4. How is your Career Ladder plan evaluated by the committee? Are there any factors involved besides the responsibilities/activities it outlines and their overall and relative amounts?
5. What has been your experience with the process of advancing up the Career Ladder?

Have any of you received any sort of waiver for the Career Ladder requirements?

IF YES:

For which component?

6. Can you describe the Performance-Based Teacher Evaluation?

PROBES:

How does the process work?

Who is involved in the evaluations?

How involved are teachers in the process of their evaluations?

Are there other evaluations of teachers that you have to undergo?

7. What are your thoughts on the linkage between the Career Ladder and the PBTE?

PROBE:

For example, to qualify for the Career Ladder there is a mandated level of performance on the PBTE. What is your opinion of this?

D. ACTIVITIES UNDER THE CAREER LADDER

1. How do your Career Ladder activities relate to your Career Development Plan?
2. How much time during the year do you spend doing Career Ladder activities? [How far above the minimum requirements do you end up going in terms of hours?]
3. What types of responsibilities or activities do you complete under Career Ladder?
4. What proportion of your time do you spend in these areas?
5. How does this vary by Career Ladder stage?
6. Teachers do a lot of things outside of the classroom. Are the activities you do for Career Ladder the types of things you did before participating in the program? Or do you do different types of activities now that you participate?
7. How much are your school administrators involved in the program?

E. PROGRAM COMPENSATION

1. Has there been any significant change in the amount of Career Ladder compensation over time?
2. Has the district ever fallen short in the amount of Career Ladder compensation provided, compared to what was promised?

IF YES:

What was the stated reason?

3. What is your opinion on the levels of compensation under the Career Ladder, given what is required of teachers?

IF NOT ENOUGH:

How far short? A little, a lot, somewhere in between? What do you think would be fair?

F. OPINIONS ON EFFECTS, BENEFITS, AND THE PROGRAM OVERALL

1. What benefits has the program had for you, besides additional pay?
Has the program improved your satisfaction?
Encouraged you to stay in the district, or stay in teaching?
Anything else? [Teachers in general?]
2. What benefits has the program had for your students?
Improved student achievement?
Student behavior?
Anything else? [Teachers in general?]
3. What other benefits have you seen of the program?
4. What barriers do you see to participating in the program?
5. I want to return to a concept we touched on earlier. How do you think the Career Ladder has influenced the decisions you've made with regard to your career?
Has it affected?
Your choice of district?
Your effort in relation to the PBTE?
Your decision on whether to retire, or to stay in the profession?
6. Has the Career Ladder increased any of the following:
Time you spend with students?
Time you devote to professional development?
Time you spend on certifications or degrees?
7. What is your overall opinion of the Career Ladder program?
What elements do you like?

What do you dislike?

How can the program be improved?

8. Is there anything else you would like to share?

CLOSING REMARK

Thank you for coming here to speak with me. You've all given me a great deal of valuable information that I think will help our study tremendously. Should you have any questions, additional thoughts, or concerns please feel free to contact me [pass out business card].