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A STUDY OF MERIT PAY FACTORS AS PERCEIVED
BY MEMBERS OF THE FLORIDA TEACHING PROFESSION-
NATIONAL EDUCATION ASSOCIATION

by

SUSAN CROWE BURNS

A dissertation submitted in partial fulfillment of the
requirements for the degree of Doctor of Education in
the Department of Educational Services
at the University of Central Florida
Orlando, Florida

May 1986

Major Professor: Dr. Arthur Olson

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by

Susan Crowe Burns

ABSTRACT

This study was designed to discover which merit pay evaluation and implementation factors were considered important by members of the Florida Teaching Profession - National Education Association (FTP-NEA). Comparisons were made of opinions within various subgroups (district size, position within organization, sex, race, age, years teaching, highest degree earned, assignment, secondary assignment).

The sample included the State Board of Directors, the Board of Directors of the United Faculty of Florida (UFF-university personnel), and FTP-NEA members in two-thirds of the local affiliates. All districts with support personnel groups were included.

The questionnaire was comprised of merit pay factors which were cited most often in the literature, and factors being considered for Florida's State Master Teacher Program. The instrument included 15 evaluation and 25 implementation factors.

Questionnaires were distributed by local affiliate presidents. The UFF board and state FTP-NEA board members were surveyed by mail. The results of 662 surveys

were analyzed, using a Chi-square test for each factor for each subgroup within the sample.

Respondents felt most strongly that "teaching experience/number of years teaching" and "administrator observations/evaluations" should be used as evaluation criteria in a merit pay plan. They were most opposed to "standardized teacher test scores" and "standardized student test scores," both "by school" and "by teacher."

They agreed strongly with several of the implementation factors, including "each teacher should have access to his/her own records" and "an evaluation instrument should stress performance on the job in the assigned area." They were strongly against the use of a quota, extra pay for teachers in shortage or alternative areas, and the involvement of business persons and legislators in planning a merit pay system.

There were several Chi-square tests which produced valid, significant differences among various subgroups. Significant differences were evident in 26 cases for evaluation factors, and 14 cases for implementation factors. The largest numbers of significantly different opinions were in the categories of "sex" (10 factors) and "assignment" (8 factors). There were no significant differences among respondents with various secondary assignments and one significant difference between black and white responses.

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To my parents, Charles and Betty Crowe, who provided the foundation for my education, and my life.

To my friends, colleagues, and professors, who have continued to build on that foundation, each in his/her own way.

To Art Olson, who always knew when I needed a "push," and when I needed a "rest."

And to my husband, Herb, who has shown me that I can accomplish anything, once the decision is made.

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CHAPTER I

BACKGROUND AND SIGNIFICANCE

Background

The concept of merit pay for teachers has received both criticism and praise during the past few years. Legislators, the press, educators, and the public have all voiced their opinions and concerns about this concept. The term "merit pay" elicits different responses from each of these groups of people. No matter which interpretation is being considered, the concept is controversial and involves far more than most citizens, educators, and legislators appear to realize (Newcombe, 1983, p. 4).

In order to fully consider merit pay for public school teachers, other areas of our society where merit is used as a factor in determining promotion and/or compensation should be considered. It has been suggested that education should model its programs after those of industry (Mondani, 1983, p. 3). However, there have been concerns with industrial programs which are not often publicized. Some of these problems include the actual factors used for a

merit evaluation, the evaluator's competence, and the procedures used during the evaluation process.

Merit compensation has been the norm in higher education. Entering salaries are often determined individually, while annual increments are based on institutional assessment of performance. Support of this system by the professors has been limited. Eymonerie (1980), after researching salary structures in higher education, suggested:

I believe that a salary structure in an organization will be most effective if its nature and rationale are thoroughly understood and accepted by those whose pay is determined by it. In practice, this condition is best achieved through faculty participation in formulating, and, to such a degree as is feasible, in effecting the policy. (p. 118)

Other researchers (Newton, 1980, p. 52; Pine & Boy, 1975, p. 19; Breslin & Klagholz, 1980, p. 44; Young & Reichberger, 1975, p. 11) tend to support this concept. Their study also led them to conclude that faculty should have input into the determination of salary structures and procedures.

Public school administrators comprise another group whose salaries are sometimes determined on a merit basis. In a study conducted by the National Education Association in 1966, approximately 60% of the respondents stated that administrative salaries were based on one of two predominant models. The first pattern related salaries of administrators to those of classroom teachers on a

percentage or ratio basis. In the second model, incremental salaries varied by the responsibility level of the administrative position (Conte & Mason, 1972, p. 11).

The history of merit pay in education illustrates some of the background of today's growing interest in the concept. The first recorded plan for teachers was in Newton, Massachusetts, in 1908 (Robinson, 1983, p. 3). A peak in merit pay implementation took place in the 1920s, while the depression of the 1930s saw the abandonment of many systems. In addition to the apparent financial problems with merit pay, the methods of measuring teacher effectiveness available at the time were considered unreliable. Some researchers concluded that merit pay, which was based on these evaluations, was equally unreliable (Conte & Mason, 1972, p. 12).

In 1957, the National Education Association's Research Division surveyed school systems in communities with a population of 30,000 or more. At that time, 6.3% of the reporting systems had authorized higher salaries for superior service during the 1956-1957 school year. By the late 1960s, merit pay systems were reported by approximately 10% of respondents, and in 1969-1970, the use of merit pay plans was down to 7% (Conte & Mason, 1972, p. 12).

Recently, it appears that there has been growing support for the concept of paying teachers based on their

competence, although the various methods of implementation are not widely agreed upon. The National School Boards Association surveyed elementary and secondary teachers in May of 1983 and found that, of this "statistically representative" sample, 63% agreed that "teachers who are more effective in the classroom should receive larger salary increases than teachers who are less effective" (Toch, 1984, pp. 1, 12).

In 1970 and again in 1983, the following question was presented on the Annual Gallup Poll of the Public's Attitudes Toward the Public Schools: "Should each teacher be paid on the basis of the quality of his or her work, or should all teachers be paid on a standard-scale basis?" In 1970, 58% of respondents felt that teachers should be paid according to "quality of work," while 61% gave the same response in 1983 (Gallup, G., 1984, p. 33).

In 1984 and 1985, the question posed on the annual poll was: "How do you, yourself, feel about the idea of merit pay for teachers? In general, do you favor or oppose it?" In 1984, 65% of respondents favored merit pay (Gallup, G., 1984, p. 34), while 60% felt the same way in 1985 (Gallup, 1985, p. 39). It appeared that there was a slight increase in the support of merit pay for public school teachers a few years ago, with a decrease over the past year. The Gallup Poll of Teachers' Attitudes Toward the Public Schools in 1984 indicated that only 32% of all

teacher respondents answered the same question favorably (Gallup, A., 1984, p. 103).

The legislature of the state of Florida responded to growing public support of merit pay by enacting the Florida Merit Compensation Program in 1983. This program created the Florida Quality Instructional Incentives Council and two plans for merit compensation. The District Quality Instruction Incentives Program was a local district merit pay plan that was subject to local negotiations. The Florida Meritorious Instructional Personnel Program was a state level program based on a "career ladder," with teachers advancing as they met additional criteria (Associate Master Teacher Requirements Detailed, 1984, p. 1). Revisions have been made in the law since its passage.

Inconsistencies have been noted with the definition and implementation of merit programs. Some school systems call their plans merit pay programs, when they actually take money away from those who are deemed unqualified rather than rewarding those who do exceptional work (Whitworth, 1970, p. 26). Regardless of the structure of any particular plan, merit pay systems are based on evaluation of teachers (Norman, 1984, p. 1).

Many teachers and administrators, in Florida and the rest of the nation, appear to be apprehensive about evaluation and, in turn, merit pay (Scherer, 1983, p. 22; Whitworth, 1970, p. 3; Young & Heichberger, 1975, p. 10).

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This concern seems to be related to the lack of knowledge and research on characteristics of good teachers and a fear of being evaluated unfairly. In addition to teachers' anxiety, there are questions regarding the implications and long-range results of a merit rating system. Paralleling the experience of industry, for a merit pay program to be successful, the employee must feel that he/she has had a fair, honest evaluation (Whitworth, 1970, p. 8). According to Bogie and Bogie (1978):

On a practical level, these findings lead to speculation as to whether teachers are generally opposed to increment systems based on merit and, if so, whether the adoption of merit systems of pay increment may introduce a variety of strains and pressures within the local school, as well as the larger educational system. If this be the case, it seems reasonable that the implementation of a merit system of pay increment should be done so with caution, utilizing care to socialize teachers into the logistics of merit systems, and/or giving consideration to the possibility of combining merit with uniform pay increments. (p. 220)

Studies within both the private and public sectors have shown that employee involvement is important in the organizational decision-making process. Helburn and Bennett presented a rationale for considering the differences between employment in these two areas (1972, p. 622). One major difference between the relationship of the employer and employee was presented. They contended that in the private sector, employer and employee are accorded equal treatment, since they have equal social importance and value. Within this structure, the role of merit is one

that can be negotiated, with both sides on a relatively equal basis. The employer, however, is considered to have greater social value within the public sector. The employee must generally accept a merit system, as a nonnegotiable condition of employment. According to Helburn and Bennett (1972), "Data showing the growth of public employee unionism indicate the increased potential for conflict between the merit principle and collective bargaining" (p. 621).

The impact of unionism and collective bargaining on education has been considerable. The 1985 Florida Teaching Profession - National Education Association slogan is "There is only one issue (\$) - ask any teacher." Teachers also want to participate more in decisions that affect their careers and working conditions. As early as 1969, Winston reported that the impact of "teacher militancy" was changing administrator/teacher relationships. The role and attitudes of teachers were also undergoing revisions. He stated that, "Administrators no longer can make casual off-the-cuff decisions relating to teachers" (p. 81).

The development of the compensation plan at the Red River Army Depot in Texarkana, Texas, was an example of a cooperative effort. The "ASK ME" system of merit pay was implemented in 1978. As Johnson and McCloskey reported, "Perhaps the best thing of all concerning the system is the fact that we did it together: the work force, the union,

managers and everyone" (1978, p. 446). They stressed the importance of including all persons affected by the plan in both the initial development stages and the implementation.

The results were different with the well publicized "Tennessee Master Teacher Plan." The Tennessee Education Association opposed this proposed program. One major objection was that teachers were denied any opportunity to become involved in the development of the plan. Union leaders declared that otherwise the plan "might have had a real chance of working" (McGuire, 1983, p. 5).

Teacher groups, especially the National Education Association, have taken strong stands against merit pay plans. They have asked first for across-the-board raises to bring teacher salaries up to those of business employees with similar training and responsibilities. Ron Early, representing the Florida Teaching Profession - National Education Association, stated that the organization was willing to look at proposals. But he felt that the organization had concerns about any merit pay plan (Early, 1984, p. 1).

The Florida Teaching Profession - National Education Association (FTP-NEA) has 53 local affiliates and represents approximately 32,000 educators, including support personnel, teachers, and college professors. The organization has an active Political Action Committee, and its members campaign for both issues and candidates they

feel will benefit the public education of students in Florida. The influence of this group has been apparent in decisions made by the Florida legislature in planning, revising, and implementing its Florida Meritorious Instructional Personnel Program (FTP-NEA improves rule, 1984, p. 1; Associate master teacher program to be changed, 1984, p. 13).

This study addresses the concerns of the members of FTP-NEA. The organization believes that teachers can often make the best decisions within educational settings. The significance of this study lies in the importance of worker/teacher input into decision-making situations. Opportunities for participation often lead to increased motivation and job satisfaction which in turn produce a more effective employee.

Significance of the Study

Teacher participation in decision-making has long been encouraged by teacher organizations (Delaware State Education Association, 1984, p. 4). Effective instruction takes place when teachers feel motivated and satisfied with their teaching situation. Studies have determined various methods of increasing teacher motivation, including providing opportunities for input into decisions made within their area of expertise.

In 1983, Crandall reviewed the research on effective schools and classrooms. He concluded that people are the critical factor in the success of an educational program. He contended that any change "will not take place without the support and commitment of teachers" (1983, p. 6). He continued saying "past work and conventional wisdom concentrate on the development of commitment 'up front' by involving teachers in problem-solving and decision-making . . ." (1983, p. 7).

An example of the positive consequences of shared decision-making was evident in the school system of Mansfield, Connecticut. The superintendent felt that the teaching staff could do its best work as partners rather than subordinates (Weingast, 1980, p. 503). The process of curriculum development was the most visible area of teacher responsibility in this system. Councils of teachers made curriculum decisions which were then presented to the superintendent and the school board. Principals concurred that their teachers had increased "professional health," and one teacher reported to feel "more respect as a person," as a consequence of the district's philosophy of shared leadership (1980, pp. 504, 6).

Terpstra discussed various theories of motivation. The basis of Maslow's theory was an appeal to the needs of the individual. Terpstra concluded that a major

of planning and execution of a job and participation in the setting of organization policies). He claimed that a job should be "enlarged" both horizontally and vertically for it to act as a motivator (1969, p. 430). However, when considered together, the evidence suggested that vertical enlargement was more important than horizontal (1969, p. 434). It appeared that the degree of participation in decision-making influenced motivation positively (1969, p. 433). He also found an increase in the quality of performance, not necessarily an increase in productivity. (1969, p. 431).

Educational reform movements have addressed the quality of teacher performance as one possible method of improving education in our public schools. Kaiser and Polczynski (1982, p. 130) studied the influence of stress on teachers' performance. They discovered that physical and psychological problems arose with conflicts in role responsibility. These led to lower job satisfaction and lower self-confidence. Another important finding was the indication that a lack of participation in the decision-making process is related to low motivation for work and low job satisfaction (1982, p. 131). One suggestion to managers would be to increase opportunities for teachers within the decision-making process. This in turn might increase the effectiveness of the teacher in the classroom.

Examples of motivation and its relevance to productivity are also seen in business. Peters and Waterman provided an insight into the success of what they termed the "excellent" companies, those which have been considered America's best-run companies. The role of the individual within the organization was of prime importance. According to psychologists, if people think they have some personal control of a situation, they will persist at their tasks (Peters & Waterman, 1983, p. 80). The "excellent" companies appeared to promote the concept of the workers' importance to the organization, as well as their own autonomy (Peters & Waterman, 1983, pp. 239, 240).

The importance of communications, and learning from the worker, has been stressed within the "excellent" companies. Ed Carlson, ex-president of United Airlines, felt that "'nothing is worse for morale than a lack of information down in the ranks'" (Peters & Waterman, 1983, p. 267). Delta's management has spent a large amount of its time talking with its people (Peters & Waterman, 1983, p. 254). And the philosophy of McPherson, of Dana Corporation, has included the value of everyone's contributing ideas. He contended that you must keep asking people what they think if you want to stay "fresh" (Peters & Waterman, 1983, p. 252).

Education is a business; the teachers are the workers. In order to help assure the satisfaction, motivation, and

effective performance of teachers, the findings of motivation studies should be considered.

One contention of teacher groups such as FTP-NEA is that teachers are the ones who can best make decisions about educational questions, including those of staffing and salary systems. Robert Townsend, ex-Avis and American Express chief, stated, "Don't ask management consultants to solve organizational problems. Ask your people - the people on the production line. They know . . . they can help" (Johnson & McCloskey, 1978, p. 431).

This study was designed to ask the people on the "production line" - teachers in Florida - how they perceive select merit pay evaluation and implementation factors. The perceptions of members of the Florida Teaching Profession - National Education Association were explored, including the differences in perceptions among various subgroups of this group.

Purposes of the Study

The purpose of this study was to:

1. Review the literature to present the variety of definitions and descriptions of merit pay; outline historical aspects of the merit pay concept; discuss the various programs which have been used, are now being implemented, or are being proposed; and to identify those factors of merit

pay evaluation and merit pay implementation which have been prevalent in merit pay rating systems.

2. Determine how merit pay evaluation factors are perceived by various members of the Florida Teaching Profession - National Education Association, and document substantial differences in perceptions among various subgroups of this group.
3. Determine how merit pay implementation factors are perceived by various members of the Florida Teaching Profession - National Education Association, and document substantial differences in perceptions among various subgroups of this group.

Study Questions

This study involved the perceptions of approximately 700 members of the Florida Teaching Profession - National Education Association (FTP-NEA). The specific questions considered were:

1. Which merit pay evaluation factors are most prevalent in the review of past, present, and anticipated merit pay programs?
2. Which merit pay implementation factors are most prevalent in the review of the past, present, and anticipated merit pay programs?

3. Which merit pay evaluation factors and merit pay implementation factors do the sample consider most important in a merit pay system?
4. To what degree do FTP-NEA members from small, middle-sized, and large districts have different perceptions of merit pay evaluation factors and merit pay implementation factors?
5. To what degree do state FTP-NEA board members, local FTP-NEA affiliate board members, and local FTP-NEA affiliate building representatives vary in their perceptions of merit pay evaluation factors and merit pay implementation factors?
6. To what degree do male and female FTP-NEA members have different perceptions of merit pay evaluation factors and merit pay implementation factors?
7. To what degree do perceptions of merit pay evaluation factors and merit pay implementation factors vary by race?
8. To what degree do perceptions of merit pay evaluation factors and merit pay implementation factors vary according to the age of the respondent?
9. To what degree do perceptions of merit pay evaluation factors and merit pay implementation factors vary according to number of years of teaching experience?

10. To what degree do members of FTP-NEA with various college degrees vary in their perceptions of merit pay evaluation factors and merit pay implementation factors?
11. To what degree do elementary teachers, secondary teachers, college professors, elementary support persons, and secondary support persons have different perceptions of merit pay evaluation factors and merit pay implementation factors?
12. To what degree do secondary language arts, mathematics, science, social studies, fine arts, and vocational teachers, guidance counselors, and media specialists vary in their perceptions of merit pay evaluation factors and merit pay implementation factors?

Hypotheses

The following null hypotheses were tested:

1. There will be no significant differences ($p > .05$) in the perceptions of merit pay evaluation factors and merit pay implementation factors among FTP-NEA members from small, middle-sized, and large school districts.
2. There will be no significant differences ($p > .05$) in the perceptions of merit pay evaluation factors and merit pay implementation factors among state

FTP-NEA board members, local FTP-NEA affiliate board members, and local FTP-NEA affiliate building representatives.

3. There will be no significant differences ($p > .05$) in the perceptions of merit pay evaluation factors and merit pay implementation factors between male and female FTP-NEA members.
4. There will be no significant differences ($p > .05$) in the perceptions of merit pay evaluation factors and merit pay implementation factors between black and white FTP-NEA members.
5. There will be no significant differences ($p > .05$) in the perceptions of merit pay evaluation factors and merit pay implementation factors among FTP-NEA members of different ages.
6. There will be no significant differences ($p > .05$) in the perceptions of merit pay evaluation factors and merit pay implementation factors among FTP-NEA members with various years of experience.
7. There will be no significant differences ($p > .05$) in the perceptions of merit pay evaluation factors and merit pay implementation factors among FTP-NEA members whose highest college degree is an associate degree, a bachelor's degree, a master's degree, a specialist degree, a doctorate degree, or no college degree.

8. There will be no significant differences ($p > .05$) in the perceptions of merit pay evaluation factors and merit pay implementation factors among FTP-NEA members who are elementary teachers, secondary teachers, college professors, elementary support persons, and secondary support persons.
9. There will be no significant differences ($p > .05$) in the perceptions of merit pay evaluation factors and merit pay implementation factors among FTP-NEA members who are secondary language arts, mathematics, science, social studies, fine arts, vocational teachers, guidance counselors, and media specialists.

Definitions of Terms

"Merit pay evaluation factors" refers to those criteria which have been used in past, present, and anticipated merit pay plans to make decisions as to which teachers should receive merit pay. These factors have been collected from the literature (see Appendix 1).

"Merit pay implementation factors" refers to those procedures/policies which have been considered in the implementation of past, present, and anticipated merit pay plans. These factors have been collected from the literature (see Appendix 2).

"Small, middle-sized, and large districts" are designated so by using the 1983-1984 unweighted FTE (full-time equivalent student number). Districts with more than 20,000 students are considered large, those with 5,000 to 20,000 students are considered middle-sized, and those with less than 5,000 students are considered small.

"FTP-NEA" refers to the Florida Teaching Profession - National Education Association, which is the Florida affiliate of the National Education Association.

"FTP-NEA board members" refers to those persons who served on the Board of Directors of the Florida Teaching Profession - National Education Association during 1983-1984.

"Local FTP-NEA affiliate board members" refers to those persons who served on the Board of Directors of the local organizations affiliated with FTP-NEA during 1983-1984 which were included in this study.

"Local FTP-NEA affiliate building representatives" refers to those persons who served as building or faculty representatives or contact persons of the local organizations affiliated with FTP-NEA during 1983-1984 which were included in this study.

The "age of the member" refers to the following categories: 20 to 30 years old, 31 to 40 years old, 41 to 50 years old, and over 50 years old.

The "number of years of experience" refers to the following categories: 0 to 5 years, 6 to 10 years, 11 to 15 years, and more than 15 years.

"Various college degrees" refers to no degree, an associate degree, a bachelor's degree, a master's degree, a specialist degree, and a doctorate degree.

Limitations of the Study

The findings of the study are limited to the responses of members of the FTP-NEA Board of Directors, members of local FTP-NEA affiliate Boards of Directors, and building representatives of local FTP-NEA affiliates. Findings reflect the perceptions of those members who returned questionnaires.

Assumptions of the Study

Several merit pay plans examined called for a quota on recipients due to insufficient funding. It was felt that some respondents might prioritize items, rather than give a true opinion, so respondents were asked to answer questionnaires under the assumption that adequate funding would be available for the merit pay plan.

It is assumed that respondents answered honestly.

It is assumed that the FTP-NEA members in the sample are representative of FTP-NEA members in Florida.

CHAPTER II

REVIEW OF THE RELATED LITERATURE

Merit pay programs in business, higher education, and administration utilize a variety of criteria and procedures. Financial rewards in public education can be traced back to the beginning of our nation. Historically, the popularity of merit pay for teachers has fluctuated. Programs now in existence incorporate a variety of procedures and criteria, some of which appear to be more successful than others. Teacher organizations have been involved in political issues, including financial compensation for teachers.

This review begins with a background on the concept of merit pay, including various definitions of the term. Merit pay in industry, higher education, and educational administration are discussed, including some of the findings in those areas. A background and history of teacher evaluation and compensation are given, followed by an outline of some specific factors which are evident in merit pay plans of the past and present, and in anticipated

plans. Views of teacher organizations, especially related to this study, are presented.

The Concept of Merit Pay

Within education, "merit pay" has come to refer to a variety of programs which may or may not contain similar components. Definitions vary from individual to individual, from organization to organization. The Council for Basic Education defined it as "any program in which some teachers get more pay than others as a result of a conscious judgment that they are more competent" (Uzell, 1983, p. 24). The National Commission on Excellence in Education considered merit pay to be "performance-based . . . so that superior teachers can be rewarded . . ." (Uzell, 1983, p. 24). According to Uzell, merit pay provided "extraordinary rewards for extraordinary teachers . . . not just for reaching the upper levels of seniority, but for reaching the upper levels of competence and effectiveness as well." He contended that "it is a system in which teachers get paid more for doing better work - not more or different work" (1983, p. 24).

Casey (1979, p. 500) declared that there was no motive for teachers, let alone students, to strive for extreme excellence under our present system. He called our reward system a "non-reward" system, which helps to condemn our schools to "mediocrity or worse" (p. 501). Our recent

quest for excellence in education has brought merit pay to the forefront.

There are many concerns evident within this recent educational reform movement. A key question asked about these reforms in a position paper of the Georgia Association of Educators was, "Will the quality of classroom instruction for Georgia's children be enhanced?" (1983). One response to this concern has been the renewed interest in merit pay for teachers. The Committee on Education and Labor of the United States House of Representatives appointed a Merit Pay Task Force Committee. Their report, given in October of 1983, stated that "the one essential ingredient for superior educational opportunity is a talented, dedicated teacher" (Perkins, 1983, p. 1). But the report continued by stating that questions about the quality of education should not be focused entirely on the teacher (p. 4). One conclusion of this study was the contention that "Merit pay is but one of many pieces in a puzzle. It can be an important piece, but it is neither inexpensive nor easy to achieve, and other pieces of the puzzle must be put into place also" (p. 6). Despite these findings, merit pay plans have continued to be designed based on a variety of criteria.

The use of measurable results within a work setting has been considered as one criteria within an incentive, or merit award program. Paul Salmon, ex-director of the

American Association of School Administrators, favored incentives linked to measurable outputs. In his opinion, "superior teachers can cover more content with more students in less time," and he would reward teachers who are able to accomplish these goals (Tursman, 1983, p. 19). However, he did not address a major concern of teachers - the backgrounds which students bring to the classroom (differing ability levels, learning styles, and family situations).

Worker compensation in business is sometimes based on similar kinds of measurable results, such as quantity and quality of goods produced. Patterson (1978, p. 17) was of the opinion that a merit system is the only salary system that is appropriate for all personnel within an organization. The philosophy behind his contention was that increased value to the organization or institution should be rewarded by increased salary. Therefore, the increased value of a teacher, leading to extra financial compensation, might be judged on an increased contribution to the education system, or to the students within that system.

The use of merit pay systems in industry has been explored as one source of data on plans that are designed to increase employee productivity. This increased productivity would in turn help employees become more valuable to the system. The following section examines a

sample of compensation programs in industry. Several of these findings will be encountered later when merit pay in the educational setting is discussed.

Merit Pay in Industry

A study conducted from 1968 through 1970 examined merit pay programs as they existed in business, industry, and civil service in Iowa (Whitworth, 1970). Some of the salient findings of this study are presented here.

Northwestern Bell Telephone Company used several criteria in assessing merit in employees. Included were job performance, participation in community affairs, interest in development of self and subordinates, oral and written communications skills, other management skills, the breadth of abilities, and developing needs (Whitworth, 1970, p. 5).

Each position within the Meredith Corporation had a specific job description. Evaluations were based on scope and impact on the company's overall operation, cost, profit, and growth; the difficulty and complexity of the job; and the knowledge and skills necessary for that position (Whitworth, 1970, p. 7).

At International Business Machines (IBM), the job evaluation was the foundation of the merit pay system. It was first determined what the job would be worth outside the company. The amount and frequency of merit increases

were based on several indicators, including individual performance, the present level of pay, and the amount of any needed adjustment in overall pay levels (Whitworth, 1970, p. 6).

A summary of the business, industrial, and civil service options examined in the Iowa study included these points (Whitworth, 1970):

1. The individual must feel that he is receiving a fair, honest evaluation.
2. The pay program must be continually evaluated, changed, and improved.
3. There must be a specific job description, or set of standards, for each position.
4. The individual must realize that there is no completely fair system which will solve all problems.
5. Evaluations should be done by the immediate supervisor, and there should be an appeals process.
6. Individual progress is based on performance.
7. If there are different classifications for jobs, salary ranges should be established within each class.
8. There should be full-time salary administrators.
9. Employees should be aware of the content of their evaluations. (p. 8)

It is significant to note that not all merit pay systems in business have been completely successful. A study on wage incentives was conducted by Esso Standard Oil Company in 1963. In 1972, Conte and Mason's analysis of this study suggested that non-financial incentives seemed to be most effective for securing maximum production (1972, p. 16).

Edward Lawler, management professor at the University of Southern California, contended that most companies have trouble making merit pay work. Employees may be hired, promoted, and retained for merit, but they are not paid each month or year on merit. Only 5% to 10% of American companies use such a plan, and these are primarily in sales and management (Hubbert, 1984, p. 5). If this practice were used in education, Hubbert contended that it would be principals and not teachers who received the rewards.

Of the American companies that employ a merit pay plan, at least 90% of the employees are commonly given annual merit pay raises. With this many employees being rewarded, the 'merit' program may be meaningless (Indiana State Association Blue Paper, n.d., p. 2).

A report of the Delaware Education Association (DEA) (1984) stated that the success of individual incentive plans as seen in business was evident only under certain conditions: "when the output produced by the individual employee is easy to measure, when cooperation and teamwork

between employees are not important, and when an employee can receive significantly more without decreasing the amount of money that other employees can be paid" (1984, p. 5). The DEA contended that none of these conditions are present in the teaching profession. Therefore, the organization concluded that merit pay for teachers is not appropriate.

Piamonte (1979, p. 597) discovered that senior managers were amazed that their merit pay plans were not working. They continued to prefer this system even though some conditions were evident which would discourage the continued use of a merit compensation plan. For example, their operating-level managers were dissatisfied with their roles in the program. And in recent motivation theories, money as a motivator has been downplayed. In many cases, the reactions of employees at merit payment time were more negative than positive. It seemed that there was little if any real evidence which linked the merit pay program to increased motivation or productivity. According to Herzberg's motivation-hygiene theory, the absence of adequate pay may cause dissatisfaction, but financial compensation does not necessarily motivate performance (Terpstra, 1979, p. 377). Despite this evidence, senior management continued to believe that merit pay was the answer to three concerns: (1) productivity is not where it could and should be, (2) lack of motivation is a

significant factor in this low productivity, and (3) money is the incentive to work harder (Piamonte, 1979, p. 597).

As with industry, there were cases in our government where incentive plans have been explored and implemented. John Greiner and Harry Hatry of the Urban Institute in Washington D.C. studied government at all levels. Of the eight states with merit pay plans, over 95% of those eligible received merit increases each year. Administrators in many cities and counties concluded that the programs caused "more headaches than bargained for" (Hubbert, 1984, p. 6).

President Carter tried to promote a merit pay program in the federal government with the Civil Service Reform Act (1980). It called for bonuses of up to 50% for certain groups of civil service employees. Because of abuse and accusations of "cronyism," the percentage was reduced to 25%, then 20%, and finally to 2% (Indiana State Teachers Association Blue Paper, n.d., p. 3). In June of 1983, an evaluation of the reform was released. The study was headed by James L. Perry, a professor at the University of California at Irvine. The research indicated that the bonuses had made no positive impact, and that a new set of problems had been created. He called the program "fatally flawed" (Hubbert, 1984, p. 6).

At the Red River Army Depot in Texarkana, a merit pay plan was developed which was deemed acceptable by

management and employees alike. Johnson and McCloskey reported in 1978 that the program was developed based on the Federal Merit Promotion Policy of 1959. There were two goals for compensation outlined in this policy: the program must meet management's staffing needs and provide opportunities for employees to compete on an equitable basis. The Red River program was called "ASK ME" - Ability, Skill and Knowledge Merit Evaluation. The system was flexible and adaptable to almost any position, and was accepted by management and employees alike (1978, p. 446).

As in industry, salary systems in higher education are often based on the merit principle. Looking at research on compensation within higher education may give direction to a study of merit pay within our public school system.

Merit Pay in Higher Education

Merit rating systems are widely used in higher education. These systems are often based on performance ratings measured by such criteria as: student opinions, the number and type of publications, the incidence and quality of public service and professional activities, and intra-institutional activities. Increases in pay are also influenced by "supply and demand" and the potential salary a person might earn in other sectors (Jordan & Borkow, 1983, p. 8).

In the late 1960s, the University of Northern Iowa employed two categories of compensation - base and individual adjustments. Every year, a set sum of money for pay increases was allotted to each department according to the number of members in that department. The evaluation procedure then included assessments by students, the department administrative staff, and peers. The most significant evaluation seemed to be that of the department head (Whitworth, 1970, p. 10).

At the Iowa State University of Science and Technology, annual increases were based strictly on merit and "supply and demand." The factors considered in promoting professors to a higher rank were number of years in the profession, experience, present rank, when the appointment was made, and duties (teaching or research) (Whitworth, 1970, p. 10).

Some merit programs in higher education have involved peer ratings of teaching effectiveness in the classroom. Centra (1975, p. 327) claimed that these ratings would not be reliable enough to use in making decisions on tenure and promotions. It was discovered that colleagues appeared to be generous in their ratings, and generally less reliable than students (pp. 330-331).

The American Council on Education surveyed faculties from large, national, cross-sectional samples of colleges and universities. In 1968, they discovered that 78% of the

faculty surveyed supported using teaching effectiveness as the primary criterion for promotion. In 1972, 80% of the respondents supported the idea. And a 1978 article by Blank reported that, "Recent time-series studies data indicate increases in faculty members' support for using teaching performance as a means of evaluation" (p. 164).

At Amarillo College in California, the administrators and elected Board of Regents hired a management consulting firm to make suggestions for improving productivity in the non-academic areas of the college. As a result of this study, merit was deemed the only salary raise program applicable to all college personnel. Significant compensation was a key: productive employees were given immediate and substantial raises, while employees whose efficiency was questioned were placed on probation (Patterson, 1978, pp. 14, 17). Patterson concluded that, "To implement such an approach as the merit-only pay system requires a determination NOT to do things the easy way. It also requires a mutual respect between management and faculty/staff, candor and honesty, and even-handedness . . ." (p. 49).

One opponent of this approach is Dennis (1982, p. 18), who felt that the process of rewarding based on merit is fundamentally dishonest. He argued that because the measure of merit cannot be made validly, it should not be

made at all. He listed eight reasons for his contention that merit pay is dishonest:

1. At most universities faculty salary differentials have very little to do with achievement.
2. Present inequities will continue and worsen as long as pay increases continue to be conceived of in terms of percentages.
3. The present system is demoralizing at best and can be antagonistic at worst.
4. The process is divisive - and takes an inordinate amount of time.
5. There was too much form-filling and standardized means of self-reporting, which was an advantage to those who are adept at filling out forms.
6. Evaluations are annually made and do not account for long-range projects.
7. Salaries have been behind the Consumer Price Index for the past 12 years or so, and talk of reward is meaningless: it is not merit, but the extent of demerit that is being measured.
8. Most evaluation instruments measure quantity and not quality. (pp. 18-20)

Although some sort of merit pay system seems to be prevalent in higher education, there are some professors who agree at least in part with Dennis' ideas. One concern is that older professors may be discriminated against

because of their lower entering salaries. The amount of time spent in preparing for the review, as well as the apparent emphasis on quantity of activities rather than quality, are also considered to be negative factors. Even with these problems, the system may be retained because of the flexibility afforded to institutions (Jordan & Borkow, 1983, p. 9).

In addition to the use of the merit principle with instructional personnel, management within education has become another target of merit pay plans (Ruttan, 1979, p. 28). Compensation for public school administrators may be influenced by the performance of their subordinates, or the value of the position within the structure of the system.

Merit Pay for Public School Administrators

There have been some efforts toward the adoption of merit pay plans for public school administrators. Programs for administrative compensation may be based upon the number of persons supervised, the highest salary of a subordinate, or the worth of the position outside education. It has even been suggested that administrator merit pay be linked to the number of teachers receiving merit pay, or student test scores (Geiger & Toscano, 1980, pp 31-33).

The Rialto Unified School District instituted a merit pay plan for managers that was deemed successful. The plan

included not only an evaluation process but an important inservice training component (Ruttan, 1979, p. 28). The district developed a list of "Performance Criteria for Managers." For each individual, both objectives and means of achievement were agreed upon by the evaluator as well as the evaluatee. As the process was better defined and more easily understood, resistance diminished. Ruttan concluded that the merit pay plan was accepted because the evaluation process was considered to be fair, it stated specific criteria, and managers could select the inservice areas in which they wanted to become involved (p. 30).

In 1978, administrators at the Los Rios Community College in California decided to apply basic marketing principles to education. A chancellor's advisory committee was organized to monitor legislation and advise the chancellor and the board on legislative issues affecting the management of the college. Working through the collective bargaining process, a merit pay plan was developed. Klapstein (1978) considered this form of compensation for the administrative staff to be an interesting innovation. The plan he described involved four components: (1) base salary, (2) an educational stipend for an earned doctorate, (3) an amount for each year of service up to five years, and (4) a merit performance stipend. This stipend ranged from \$0 to \$2,000 for standard performance and up to \$3,000 for exceptional

performance. To provide flexibility within the system, these payments were not locked into a schedule (p. 34).

For all incentive systems reviewed, the teacher or employee evaluation held a key position in the process. The history of teacher evaluation and compensation has an important role in understanding today's concerns, plans, and innovations in the area of merit pay.

Teacher Evaluation and Compensation

In the United States, the role of the teacher in education and in society reflects the role of the teacher in "colonial society." During the early history of our country, teachers were expected to live up to very high community standards, both in their professional and personal lives. The "rewards" of teaching were intrinsic and seemed to include such things as personal satisfaction in educating our youth and making a lasting contribution to society. Even then, teachers were compensated at a rate far below the level of their training or influence.

Teachers were not treated equally and were often subject to the "whims" of the community they served. As early as 1789, Benjamin Franklin accused the "masters and trustees" of cutting the English teachers' pay and increasing their duties, while increasing the pay and decreasing the duties of the Latin teacher (Keeney, 1958, p. 29).

The "spoils" system of the 1870s and early 1880s may have been one reason for the establishment of the first merit systems in the United States. The Pendleton Act of 1883 was the basic federal civil service reform law. Originally, teachers negotiated individually with local school boards, but the early 1900s saw several plans for merit pay studied, proposed, and implemented.

The first merit pay cycle in education began in 1908 in Newton, Massachusetts. The 1920s saw a peak in merit pay in education. In 1923, the National Education Association's Research Division conducted the first salary schedule study. Their research suggested the principles of these schedules fell under three objectives: (a) making teaching a profession, (b) securing and retraining competent and desirable people as teachers, and (c) assuring maximum service and professional growth from all teachers (Conte & Mason, 1972, p. 9).

The "single salary schedule" is a method of teacher compensation in which all teachers are paid according to the number of years of teaching experience and the highest college degree they have earned. A major objective of this method was to assure that teachers were paid equitably regardless of their sex or assignment (Conte & Mason, 1972, p. 9).

The first single salary schedules were adopted in 1921 by the Denver and Des Moines school systems. As of 1946,

more than 40% of school districts used the single salary schedule. The percentage had risen to approximately 97% in 1950. By the late 1960s there were no systems which distinguished between elementary and secondary teachers for pay purposes (Conte & Mason, 1972, p. 9).

Although the use of the single salary schedule is prevalent in public education today, a variety of merit pay programs have been studied, proposed, implemented, and abandoned. Each of these situations has produced its unique purpose, criteria, and implementation.

In 1954, the Utah legislature approved a program to conduct a thorough study of merit salary ratings for teachers. At the conclusion of the study in 1960, recommendations were made to the legislature. However, the cost of administering the program was so high that the 1961 legislature defeated the bill (Love, 1970, p. 7)

The Florida legislature enacted a merit salary program in 1957 with the career increment plan. This program was changed to a plan of "state competence awards" in 1961. In 1963, the competence awards were abolished because of large increases in resignations and increased difficulty in recruiting teachers, particularly from outside the state (Whitworth, 1970, p. 10).

The school system of Montgomery County, Maryland, dropped its merit pay plan 20 years ago. At that time, teacher groups concluded that the system hurt morale and

failed to distinguish the most exceptional teachers (Tursman, 1983, p. 22).

These are examples of the situations in which merit pay systems were tried and abandoned. Between 1938 and 1958, 70% of the districts which had implemented such a plan, had discontinued them. The second cycle of merit pay began in the late 1950s and peaked in the late 1960s. By 1968, 119 of all districts with 6,000 or more students reported to have a compensation system using merit. By the early 1970s the concept began to decline again. In 1972 only 6% of the districts with 6,000 or more students continued to operate using some type of merit pay system (Hubbert, 1984, p. 4).

In 1978, the Educational Research Service surveyed 11,500 school districts with more than 300 pupils each. About 4% of the respondents declared that they were operating under a merit pay plan at the time. Another 8% responded that they had tried such a program and abandoned it (Robinson, 1983, p. 2).

Recently, many boards of education have again considered providing incentives to teachers for performance in a variety of situations which enhance the education of our children. The Educational Research Service designed a plan which would allow teachers to choose the activity or activities they might engage in to produce better results in the classroom. Within this plan, a teacher could earn a

reward when individual goals and a performance plan were submitted for verification to an approved committee. "The key to this plan is that the teacher is responsible for designing the proposal and objectively measuring whether its been successful" (Scherer, 1983, pp. 24, 25). Ideally, this plan would be used in conjunction with the conventional plan, thus including evaluation as part of the program.

Keeney described a merit pay system in which the Lebanon (Connecticut) Teacher Association was instrumental in working with the school board. Their system included individual goal-setting, with five progress reports due during the year. Teachers accepted the contract, which included three extra days for merit pay and curriculum discussions (1978, p. 34).

Another community which took a leadership role in merit pay was Ladue, Missouri. It consisted of a small district (3100 students) outside St. Louis, which spent \$4600 per pupil, and had an average teacher salary of \$29,000. The program in operation in Ladue had three salary levels, and a range of merit points for each. Ladue Superintendent Charles McKenna considered his district's merit compensation plan a successful one, and named these components of the system:

1. Staff affected by the program were involved in its origin and are continually involved in its maintenance.
2. Whenever a professional is engaged in a task included in the criteria, he or she is subject to rating.
3. Evaluation is amenable to record. Data on which judgments are made are part of the evaluation.
4. There are clearly defined and well-understood processes.
5. An appeal process is built in.
6. Administrators responsible for the program are trained in instructional leadership and evaluation.
7. The salary and evaluation programs are subject to change as needed.
8. The full range of merit increments is open to all; there are no quotas.
9. Adequate resources underpin the entire program.
(Ladue, MO.- 'Proof it can work.', 1984, p. 143)

Recently, the Charlotte-Mecklenburg (North Carolina) plan brought national acclaim. In 1984-1985, the school system implemented a six-level "career ladder" for teachers. Permission was received to waive the state tenure law. According to the plan, teachers may be considered probationary for as long as six years, with

extensive teacher training available during the probationary period. In addition, teachers have an opportunity to combine the traditional classroom teaching experience with curriculum, inservice and research projects. Governor Hunt said of the system, "If it (the teacher career development program) doesn't work in Charlotte-Mecklenburg, I don't think it's going to work anywhere else in this state or this country" (Schlechty, Joslin, Leak, & Hanes, 1985, p. 8).

Governor Lamar Alexander proposed the Better Schools Program for Tennessee in January of 1983. Included in the proposal was the Master Teacher Program (later called the Career Ladder Program) for teachers, as well as a career ladder program for administrators. During the legislative session, the plan was defeated. The Tennessee Education Association (TEA) fought its implementation, and highlighted the fact that teachers had not been adequately involved in the planning phases. There were many changes made after the original proposal, and the program was implemented in the 1984-1985 school year (French, 1985, p. 11). According to Willard McGuire, past president of the National Education Association, the original Tennessee plan would have destroyed tenure, eliminated key provisions of the state negotiations laws, blocked local control of evaluation, decertified every teacher every five years, and

forced some teachers to perform administrative duties rather than teacher chores (1983, p. 6).

In the Houston (Texas) "Second Mile Plan," specific amounts of money were paid for specific teacher activities or characteristics. For instance, teachers were paid more for teaching in high priority areas, teaching in critical shortage areas, teaching in schools with outstanding educational progress, teaching in unique campus assignments, outstanding attendance, and professional growth. In response to suggestions by teachers and administrators, changes were made in the program. While some individual teachers supported the program, with the suggested improvements, teacher organizations opposed the entire plan (Say & Miller, 1982, p. 291).

Although the criteria and structure of these merit plans varies from situation to situation, there are some conditions which appear to be more prevalent than others. These factors might be grouped as "evaluation factors" or "implementation factors." Those dealing with evaluation stress the teacher characteristics or conditions that must be met for a teacher to receive merit pay. In other words, "Who should receive the bonuses?" The implementation factors are those involved in the actual process and structure of the merit pay system, or "How is the program implemented?"

Merit Pay Evaluation Factors and Implementation Factors

Keeney reported in 1958 that "authorities seem to feel that the problem of how to relate, fairly and successfully, the factor of meritorious competency to acceptable salaries is still one of the largest unsolved problems in the area of teacher personnel" (p. 4). Even today, many educators feel that this problem is far from being solved. Some sources suggest that evaluation of teachers should be primarily to identify strengths and weaknesses in order to help a teacher improve performance in the classroom, rather than as a way of rewarding or punishing teachers (Delaware State Education Association, 1984, p. 12).

Arguments against merit pay usually cite the complex characteristics of teaching and the fact that it is difficult to measure teacher efficiency. Merit pay systems are generally based on teacher evaluation. One problem with a system might involve this rating, or evaluation. Little conclusive research has been done on exactly which factors are valid when evaluating teachers (Mondani, 1983, p. 3). Years of experience and amount of training do not necessarily indicate "good teaching." Rating scales, which are commonly used today, are sometimes cited as being inadequate for evaluating teachers.

Soar, Medley, and Coker encountered three major problems in many rating scales which are commonly used to

evaluate teachers. These scales often lacked the minimum properties generally agreed upon as necessary for performance measurements (i.e., a standard task, a record of the performance, and an agreed-upon scoring key). The rating scales examined also lacked validity, and were highly susceptible to the halo effect (1984, p. 12).

Some other concerns were noted by Keeney in 1958. His research indicated that evaluations were felt to be made out of context, and that rating devices could not measure the intangibles of good teaching. The process was costly and time-consuming. He suggested that often a "supervisor who was forced to rate was rating a situation in which he was a partner" (p. 36).

The Educational Research Service also noted problems with evaluation. They highlighted inconsistencies among evaluations, poor instruments, too much record-keeping, and a belief by teachers that impartial ratings were impossible (Scherer, 1983, p. 24).

Another area of concern was discussed by Marques, Lane, and Dorfman, who conducted a study at the college level in 1979. They concluded that consensus must be established on the nature of effective teaching before adequate evaluation procedures can be validated and implemented. They found several dimensions that appeared consistently: general rapport with students, lecture style, arousal of student interest, course difficulty, appropriateness of work load

and instructor's ability to address student questions and comments (p. 840).

Marquis et al. used these factors as a basis for their study. They concluded that measures relating to the amount of information imparted in the course, the arousal of student interest, lecture and/or presentation style, and the instructor's general knowledge of the field should be the foundations of any evaluation system designed to assess the affectiveness of instructors (Marquis et al., 1979, p. 847).

Some problems have arisen in situations where teachers have felt that the process has been imposed upon them. Pine and Boy claimed that teachers need to have a significant voice in designing and carrying out any evaluation procedures. They considered the ultimate purpose of an effective evaluation to be the growth and development of the student. They proposed two questions for use in examining an evaluation process: "Are we helping the student?" and "How can we improve teacher and teaching effectiveness to be of greater value to students?" (1975, p. 19).

Young and Heichberger also investigated teachers' desires to be involved in planning evaluation systems. They surveyed elementary teachers in selected rural and suburban schools in western New York and graduate students in a course in supervision of instruction at a western New

York state college. They discovered that "One hundred percent of all teachers in the study stated they would want to take part in developing or selecting evaluation instruments, so they would be familiar with the criteria against which they are being judged" (1975, p. 11).

The importance of teacher involvement in the planning and implementation of the evaluation process within a merit pay system has been emphasized in other studies also. According to Breslin and Klagholz, "an essential condition for any merit pay system is the central role of faculty in the evaluation process" (1980, p. 44). Pine and Boy supported the concept when they suggested, "Teacher resistance to evaluation will be overcome when teachers have a significant voice in designing and carrying out evaluation procedures" (1975, p. 19). Holzberg stated that, "The plan will work if teachers are convinced that standards developed and competencies measured are valid, reliable, and objective" (1974, p. 116). Newton's research led him to claim that, "Faculty involvement in devising an outcomes-centered evaluation system is important" (1980, p. 52).

Although the literature suggests that teachers want to be involved in the evaluation process, it appears that they have little understanding of how evaluation might help them in the classroom. Jensen reported in 1981 that "little evidence of how teachers perceive teacher evaluation

practices affecting the improvement of their teaching performance exists" (p. 130). In the same article, Glass ". . . points to the defensiveness and distrust that teacher evaluation can arouse and warns that teacher evaluation can suppress as well as support teaching improvement" (Jensen, 1981, p. 130).

Newton summarized commonly-held feelings on evaluation systems:

Evaluation systems can distinguish the very bad . . . from the vast majority of teachers; but few systems separate average from superior or superior from excellent . . . , clearly educators have failed to devise a system for distinguishing and rewarding different levels of performance - much to the distress of the public, especially the business sector, which identifies the lack of an appropriate incentive system as one major cause for education's low productivity, overall lack of progress, and general inefficiency. (1980, p. 45)

The question of who performs the evaluations has arisen as a concern of teachers. One potential problem involved in evaluation is the lack of competent, trained evaluators. Frase, Hetzel, and Grant (1982) considered the most significant assumption to be that "competent administrators are capable of identifying excellence in the classroom" (p. 70). Because of lack of consensus on what excellence is, some teachers are unsure of the reliability of evaluations, even with competent administrators. And they often feel their administrators are not competent.

Another often-mentioned argument against merit pay is that teacher morale will be undermined and teachers will

"go against" each other. Phelan's study gave a case in favor of this argument. He suggested that highly arbitrary and subjective measures of performance will evoke staff bitterness and hostility (1983, p. 48). There might be a serious potential problem of dissension within the teaching ranks as a result of this type program. One of Phelan's suggestions included consideration of the perceptions of dissension, as well as the reduction of its causes (1983, p. 47).

These studies have shown how teachers' feelings and perceptions are important considerations in planning a merit compensation system. Some researchers have encouraged consideration of teacher opinions in other aspects of merit pay as well. Howard (1983) suggested that those teachers with great potential may be reduced to mediocrity because they are not provided with any incentives, besides intrinsic, to do better. He went on to state,

To administer teachers on a merit basis is a demanding responsibility no one can meet infallibly, but to reward mediocrity on the same basis as outstanding or dependably good performance is utter fallibility, because it eliminates from teaching a powerful incentive to excel that is common to most other occupations. (p. 27)

Based on her research at Teachers College, Columbia, Zumwalt disagreed with Howard's ideas. She discovered that veteran teachers had positive feelings about their teaching

jobs for a variety of reasons which did not relate to financial rewards. Among these were respect; recognition; reinforcement; being a member of a teaching team; earning grants for curriculum development; and being encouraged by principals, parents, colleagues, and students (Scherer, 1983, p. 159).

Frase et al. examined the concept of teacher incentives by reviewing management and motivation literature. They revealed that a major reason for failure of merit pay systems was the basic assumption that money serves as an effective motivator (1982, p. 67). They concluded that more studies should be done on the use of financial recognition for a job well done. "It appears teachers do not value additional financial recognition other than that which they receive from the salary schedule" (p. 75).

Newton's work also led him to conclude that one of the major forces which motivate better performances by individuals within organizations is the recognition of achievement (1980, p. 51). Panyon and McGregor (1976, p. 460) found that participation in decision-making seemed to be more important than incentive plans. Their report involved a plan to reduce absenteeism by employees in the city labor force of Plainview, Texas.

Another possible evaluation criterion which concerns teachers is the use of student test scores (or the

"results" of teaching) in determining merit pay recipients. Soar et al. made an interesting point when they noted that technicians and professionals are evaluated in different ways. Technicians (plumbers, carpenters, repairmen) are judged on the actual results of their work. Professionals (doctors, lawyers), on the other hand, are evaluated on the procedures they follow, since the actual results are often influenced by factors beyond their control. They are expected to use the most applicable "treatment" based on the current knowledge in the field. Teachers, however, are often treated like technicians: people expect "results" even when circumstances may be beyond the control of the teacher (1984, pp. 1-3). This has been a strong point with teachers and teacher organizations. It has been claimed that students come to the classroom with such varied backgrounds that test results cannot be a valid judge of a teacher's performance (Norman, 1984, p. 5).

Experts across the country do not agree with the use of student test scores for teacher evaluation purposes. According to Good, "'If good teaching means high test scores, then teachers will mobilize all teaching to that purpose'" (Scherer, 1983, p. 23). He feared that abstract processes, such as problem-solving, might be dropped from many curriculums. He proposed the question of whether our schools should be answer-oriented or learning-oriented (p. 23).

A similar opinion was expressed by Richard Murnane, Associate Professor of Economics at the Harvard Graduate School of Education. He contended that using student achievement tests for merit pay purposes could put a premium on having the brightest students, perhaps resulting in teachers lobbying for students. Samuel Bacharach, of Cornell University, said that "any system based on student tests reflects a belief in the scientific objectivity of tests to a degree of predictability and accuracy we just don't have" (Scherer, 1983, p. 23).

All of the points mentioned here have been considered within the process of teacher evaluation in merit pay plans. Many school systems who instituted merit pay systems over the past 20 to 30 years have abandoned them (Newcombe, 1983, p. 19). The Educational Research Study of 1978 found that a great many merit pay programs were halted because this evaluation process was found to be unsatisfactory (p. 19).

In some cases, a newly implemented merit pay program made a big change in the evaluations that teachers had been receiving. This change in evaluation often led to teacher resistance of the plan. The Portland, Connecticut, school system implemented a merit pay plan for two years, but then discontinued it. Portland Superintendent George Cunningham said the program was discontinued because "teachers who were accustomed to receiving 'above average' and

'outstanding' ratings were suddenly average" (Tursman, 1983, pp. 22, 23). It appeared that the self-concept of the teacher was considered to be important enough to warrant a change in the process.

Cooper (1972) presented a different perspective when he declared that "what is unfair is the short-changing the profession receives with failure to identify viable professional skills and needs that can be specifically diagnosed, refined and evaluated through inservice training oriented specifically to individual teachers" (p. 25). Although inservice training is not the vehicle to meet all of the needs of teachers, it may be one way to encourage individual teachers to assess their own skills and plan for their own professional improvement.

There are many factors which contribute to success in the classroom and in a school itself. Teachers, like students, are different; what "works" for one may not be successful for another. Willard McGuire, past president of the National Education Association, paralleled successful teaching to successful learning: one technique alone, no matter how useful, will not solve all of the problems (1983, p. 2).

Another important factor to be considered is the timeline of implementation of any program of this type. After five years of study, the Utah School Merit Study Committee concluded in 1960 that merit salary programming

is feasible and desirable for the personnel of a properly organized and qualified public school district which has properly prepared itself (pp. 4,6).

The importance of this initial planning was also noted by Scherer in 1983.

Both critics and proponents of merit pay warn that the wrong merit plan, the wrong procedures, could increase competition among teachers, lower student and teacher morale, and, worst of all, by inaccurately defining what it means to be a good teacher, effectively cut off true educational reform. (1983, p. 22)

The Idaho Education Association (1984) prepared a handbook for use by its affiliates in planning for the voluntary participation of districts in the development of supplementary career compensation plans. One statement the organization made echoed the opinions of many teacher organizations as well as business leaders: "The importance of planning cannot be overstated, since, apart from a statement of objectives, the success of the program depends on how well it is planned" (Idaho Education Association, 1984, p. 8).

The issue of funding merit pay plans is also a crucial one, not only involving the amount earmarked for merit pay recipients, but also the additional funds necessary for implementation and administration of such a program. "Perhaps the most vital issue for teacher improvement plans is not what shape they will take but who will pay for them"

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(Stimson, 1983, p. 40). Throughout the history of merit pay, it has been stressed that sufficient funds must be provided for the development, implementation, and evaluation of the program.

The administrators of the Midland, Texas, school system gave four reasons for the success of their merit pay plan. Their starting salaries were slightly above average already. Also, there was no limit to the number of teachers who could receive the extra money. Teachers had been involved in all phases of the plan, including the selection process. And evaluations were based upon performance (Tursman, 1983, p. 23).

One consideration that is frequently stressed is the low base salary of teachers. Teacher organizations in particular and other individuals and groups have stressed that teachers should be paid a reasonable salary initially both to attract and to keep good people in the classroom (Scherer, 1983, p. 159). Keeney reported in 1958 that more realistic wages should be made available to all teachers before any kind of merit pay plan is even considered, and teacher groups continue to stress the importance of this concept. The administration of the Penn Manor, Pennsylvania, School District cited low starting salaries as one reason they reconsidered their policy of paying \$1,000 bonuses to merit winners (Tursman, 1983, p. 23).

Breslin and Klagholz (1980) studied New Jersey's eight state colleges. Their research suggested that it was most important for a sound salary structure to be in place before a merit plan can be successful. They also contended that "the academic profession itself should take the lead demanding that compensation be awarded on the basis of merit" (pp. 43, 44).

Significant research has been completed on the factors which appear to be important in a successful merit pay program. In a review of surveys, local plans, and interviews made by Tursman in 1983, it was discovered that plans tied to incentives can work if (1) teachers are involved from the start to the finish, (2) base salaries are adequate, (3) the incentives are large enough to warrant additional effort, and (4) other issues from evaluation to selection criteria are seriously considered (p. 19).

There are situations highlighting factors which appear to encourage the failure of a merit pay plan. An excellent example was in the school district of San Marino, California, a suburb of Los Angeles (near Pasadena). Their merit pay system was started in the early 1950s and appeared to continue successfully through the 1970s. However, in 1980-1981, the negotiating team "challenged the system." Their objections included: (1) nobody knew the criteria used, (2) a committee of administrators appointed

by the superintendent made all the decisions, and (3) the names of the merit teachers were kept secret. The program was subsequently abolished as the superintendent considered it to have no great educational value (Smith-Hopkins, 1984, p. 16).

Eric Rhodes, president of Educational Futures Research, suggested the following questions which might be considered as guidelines in planning merit pay proposals:

1. What is your purpose? Is it to improve instruction, reward outstanding teachers, attract better teaching candidates, motivate teachers?
2. Will you evaluate teachers on the basis of their assignment and degree of responsibility? or student standardized test results? on peer or administrative observation of performance? or a combination of the above?
3. How will teacher associations and universities participate in decisions about implementing merit pay? What will your appeal process be?
4. What is your time line? (A year of planning is realistic.)
5. What costs are you willing to bear? Rewards must be sufficiently attractive, at least 10% of average salary. A merit pay plan in a district of 500 teachers with an average salary of \$20,000 could cost a minimum of 1/3 million dollars. (Scherer, 1983, p. 159)

These questions are similar to many which have been proposed by various teacher organizations. Their close involvement and influence on evaluation and compensation of teachers warrants an examination of the policies and considerations of these organizations.

Views of Teacher Organizations

Historically, most teacher organizations have had reservations about merit pay. Generally, four concerns have been noted:

1. The base salaries are too low.
2. There is a fear of an effort to keep school expenditures and teacher salaries low by providing pay incentives to a minority of teachers.
3. Many difficulties had to be overcome when the single salary schedule was originally instituted.
4. There are reservations about the ability of local districts to design and implement a consistent and equitable evaluation program. (Jordan & Borkow, 1983, p. 4)

In 1980, the Paradise Valley Unified School District in Phoenix instituted a plan for ranking non-tenured teachers. The goal was to reward those teachers at the top of the list with early contract renewal and to terminate or provide remediation for those considered to be at the bottom of the ranking. The Arizona Education Association (an affiliate of the National Education Association) filed suit, claiming the program violated state law requiring the school system to seek teachers' involvement in the evaluation process. The county attorney and the Arizona Attorney General ruled that the ranking system was illegal before the suit went to court (South, 1980, p. 31).

Recently, major teacher organizations have expressed a willingness to participate in discussions. However, they contend that "decisions about teacher salary structures or procedures should be made at either the State or local level and that the affected teachers should be involved" (Jordan & Borkow, 1983, p. 4).

There has been a concern on the part of teacher organizations that the process of collective bargaining would be bypassed in the implementation of a merit program. Helburn and Bennett (1972) revealed that, "Data showing the growth of public employee unionism indicate the increased potential for conflict between the merit principle and collective bargaining" (p. 621). Problems have arisen in defining the merit system/bargaining relationship (p. 625). There are legal frameworks which are necessary: (1) the merit system law is limited to the strict application of the merit principle, and (2) the public employee collective bargaining law provides for exclusion of merit system matters from the scope of bargaining (p. 627). Helburn and Bennett suggested, "In the final analysis, unless the merit system and the collective bargaining system are closely coordinated, accommodation along the lines which have been suggested would not be possible" (p. 629).

Contrary to these contentions, a Florida judge ruled that awarding bonuses to selected teachers does not violate collective bargaining laws. It was ruled that the awards

are not wages, so they are not subject to collective bargaining. It was also ruled that the money is provided by the state, so it is not subject to collective bargaining laws even if the awards were considered wages (Bell, 1985, p. B1).

The question of collective bargaining is a complicated one. Robert Palaich, of the Education Commission of the States, declared that "collective bargaining would lead, as it historically has led, to more pay for more work" rather than more pay for better work (Uzell, 1983, p. 24).

It is considered in some cases, however, that the absence of a collective bargaining law makes the implementation of a merit pay plan easier. According to Miller and Say, "Unquestionably, the absence of a mandatory collective bargaining law in Texas has enabled the Houston schools to proceed with the Second Mile Plan" (1982, p. 25). With or without collective bargaining, the question of teacher effectiveness on the job must be addressed.

In a study reported by Rist in 1983, 61.5% of National Education Association members said that salary increases should be related to classroom effectiveness (p. 24). Many educators and organizations seem to favor a "career ladder" approach. Teachers with more experience, training, and ability, would be eligible to move up a professional "ladder." Each step of this ladder might include more and

varied responsibilities, but also more monetary compensation (Tursman, 1983, p. 22). An Idaho Education Association publication addressed this salary structure.

While many of Idaho's teachers remain skeptical of the value of such a change in compensation structure, the IEA believes that Career Ladders, if carefully and cooperatively structured, could provide Idaho's teachers professional opportunities not previously available to them. The IEA also views Career Ladder development as a unique avenue through which teachers can direct and monitor their own profession. (1984, p. 1)

Mary Hatwood Futrell, president of the National Education Association, outlined the points a local plan must include in order to gain National Education Association approval. These include:

1. The plan should not replace competitive salaries.
2. It should provide a career ladder, reward competence, and not remove the best teachers from the classroom.
3. It should clearly state who is responsible for implementation, and extra training for evaluations should be available if necessary.
4. The planners should consult with the unions.
5. It should not be intrinsically divisive.
6. The selection process should be "free from arbitrary or capricious political whim."
7. Advancement opportunities should not be limited to a small number or percentage of teachers.

(Stimson, 1983, p. 39)

The California Teachers Association worked closely with the state legislature to develop an education reform and financing plan that the Association could support. They developed a new category of "mentor teachers" who are nominated by teacher-controlled committees and selected by local school boards (Uzell, 1983, p. 24). Tennessee's original "master teacher" plan was rejected, primarily due to Tennessee Education Association opposition, which included the lack of teacher involvement in the planning process (McGuire, 1983, p. 5).

The Association for Supervision and Curriculum Development appointed a Task Force on Merit Pay and Career Ladders. Their preliminary report included these two beliefs:

- (1) Salaries for all teachers must be adequate, and any plan that trades off the salaries of the many for the salaries of a few is ultimately unworkable and unacceptable.
- (2) Any plan must have the support and involvement of those to be affected, must ensure due process, and must develop trust in the evaluators who made the critical decisions. (English, 1985, p. 35)

Many of the merit pay plans which have been implemented and studies which have been conducted have shown that teacher involvement in the planning stages of any program is extremely important. The role of teacher organizations has been shown to be influential in planning and implementing merit pay plans (Associate Master Teacher Program to be Changed, 1984, p. 13; McGuire, 1983, pp. 5, 6; South, 1980, p. 31).

Teachers give input to their professional organizations based on their perceptions. Opinions and ideas may vary within subgroups of teachers: male/female, number of years of teaching experience, etc.

This study involves an examination of two types of merit pay factors: "evaluation factors" refers to the criteria used to award merit pay and "implementation factors" refers to those processes or guidelines which are evident in the implementation of a merit pay program. This study is designed to discover teacher perceptions in these areas, as well as to determine to what degree various subgroups of teachers agree on the same evaluation and implementation factors.

Summary

A variety of definitions and interpretations of the concept of merit pay were presented in this literature review. Implementation in industry, higher education, and educational administration was examined. Teacher evaluation and compensation were discussed, including the history and background relevant to this study. Some specific details of merit pay plans, including criteria for compensation and procedures followed, were presented. The review concluded with the positions of teacher organizations as related to this study.

CHAPTER III

PROCEDURES

Background of the Study

The approval of the Florida Teaching Profession - National Education Association (FTP-NEA) was necessary to survey its members through its organizational channels. The first step was to receive the endorsement of the Instruction and Professional Development Committee of the Orange County (Florida) Classroom Teachers Association. This approval was obtained in March of 1984 (see Appendix 3). Permission was requested from the president of the Florida Teaching Profession - National Education Association, to distribute the survey during the 1984 Representative Assembly in the spring of 1984 (see Appendix 4). FTP-NEA's policies do not permit surveys by individual members at this annual meeting, but the president suggested that local affiliate presidents be contacted with a request to distribute and collect the survey at a local building representatives' meeting and a local Board of Directors' meeting (see Appendix 5).

Members of the Orange County Classroom Teachers Association Merit Pay Task Force and the Orange County Classroom Teachers Association Instruction and Professional Development Committee were asked to serve as a "panel of experts" to offer suggestions to the researcher and address the validity issue. Both of these groups had researched and worked extensively in the areas of teacher evaluation, teacher effectiveness, and merit pay. These groups critiqued the original instrument (see Appendix 6), and commented on the procedures and data analysis which had been proposed.

The preliminary instrument was field tested with a group of teachers in Orange County. The findings were referred back to the panel of experts. Their assistance was invaluable in developing the final instrument, as well as suggesting procedures which would make the results of the study more valuable to their professional organization, and its teacher members.

Development of the Instrument

One purpose of this study was to "review the literature to present the variety of definitions and descriptions of merit pay; outline historical aspects of the merit pay concept; discuss the various programs which have been used, are now being implemented, or are being proposed; and to identify those factors of merit pay

evaluation and merit pay implementation which have been prevalent in merit pay rating systems." The examination of the literature was crucial to this study, not only as the review of the background and significance of the concepts involved, but as the groundwork for the development of the instrument which formed the basis of the study.

The literature on merit pay appeared to deal with two different, but related, aspects of the concept. Many of these programs outlined not only the criteria for a teacher's being deemed "meritorious," but also the procedures and implementation considerations in a program of this type. Two separate areas of the merit pay question were considered: "Who should receive recognition and/or financial rewards?" and "How will the program of rewarding teachers be implemented?" In the development of the instrument, these concepts were considered "Merit Pay Evaluation Factors" or "Merit Pay Implementation Factors."

It was discovered that some evaluation criteria were mentioned more often than others in the literature. For example, "teaching experience/years of teaching" and "master's degree" are now the most prevalent means of determining teachers' pay levels, while "additional areas of certification" was not mentioned often. However, some criteria which were not cited often in the literature were included in this study. Many of these factors had been considered locally and were relevant to the merit pay

proposals being offered in Florida. Appendix 1 addresses some of the sources and considerations made with each of the evaluation criteria used in the instrument.

The implementation factors addressed in this study deal primarily with the then-proposed Florida Master Teacher Program. Philosophical statements such as "All teachers should receive more money before any teacher is rewarded" were found often in the literature review. However, some statements (such as those dealing with the training of evaluators) were especially relevant to the Florida program, since those were contained in the proposed plan in this state. The sources and considerations made with each of the implementation criteria used in the instrument are discussed in Appendix 2.

Additional purposes of this study addressed the perceptions of members of the Florida Teaching Profession - National Education Association. Two aspects of these perceptions were examined. The opinions of the total sample were determined and recorded. The responses within select teacher categories were also considered, and comparisons were made among subgroups within those categories.

Background information was requested at the beginning of the questionnaire. Respondents were asked to give information pertaining to the size of the school district, position within the teacher organization, sex, race, age,

years of teaching experience, highest degree earned, assignment, and specific secondary assignment.

The first section of the questionnaire following the background information addressed the evaluation factors. Respondents were asked to make certain assumptions when completing this part. They were asked to assume that the program was to be implemented in their school district, giving the FTP-NEA members a more personal reason to respond. Because limits on the number of teachers and funds available can affect opinions on criteria, respondents were also asked to assume that there be no limit on either of these two factors (see Appendix 7).

The last section of the questionnaire contained the implementation factors which had been determined through the literature. Respondents were asked to answer to what degree they agreed with each of the statements given (see Appendix 7).

The original questionnaire used the following Likert scale: 1-strongly agree, 2-moderately agree, 3-slightly agree, 4-slightly disagree, 5-moderately disagree, and 6-strongly disagree. An even number of choices was used to discourage the respondent from giving neutral answers. The final instrument employed a four-item Likert scale, which ensured the achievement of the instrument's purpose without asking respondents to make potentially less reliable decisions (see Appendix 7).

Determination of the Sample

All members of the FTP-NEA Board of Directors for 1983-1984 were considered within the survey sample. The faculty representatives and members of the board of directors of the United Faculty of Florida (university personnel), as well as those members of the FTP-NEA affiliate at the Florida School for the Deaf and Blind, were also included in the study. However, these respondents were not grouped with the other affiliates by size since their structures are different from the county/district structure of the majority of the sample.

To determine the composition of the remainder of the sample, the 67 districts in Florida were divided into three groups using the 1983-1984 unweighted full-time equivalent (FTE) student count. Districts with more than 20,000 students (21 districts altogether) were considered "large," those with more than 5,000 but less than 20,000 students (20 districts) were considered "middle-sized," and those with less than 5,000 students (26 districts) were considered "small." Of the FTP-NEA affiliates, 27 fell into the "large district" category, 12 into the "middle-sized district" category, and 12 into the "small district" category.

Included in the sample was any district which had a support personnel or para-professional group. The

affiliates in these districts were automatically considered part of the sample.

Within the 27 FTP-NEA affiliates in "large" districts, there were 15 affiliates in districts with support groups. Within the 12 FTP-NEA affiliates in "middle-sized" districts, there were two affiliates in districts with support groups. And within the 12 FTP-NEA affiliates in "small" districts, there were four affiliates in districts with support groups (see Table 1).

TABLE 1

PRELIMINARY DETERMINATION OF THE SAMPLE

	Large >20,000	Middle 5,000 20,000	Small <5,000
Total Number of districts	21	20	26
Number of FTP-NEA affiliates ^a (n=51)	27	12	12
Number of affiliates in those districts with support groups (n=21)	15	2	4

^a This number may include more than one affiliate per district.

The information in Table 1 suggested a sample of 2/3 of the FTP-NEA affiliates within each category. Three affiliates in the "large" group, six in the "middle-sized" group, and four in the "small" districts were randomly selected. The subsequent sample included 18 affiliates in the "large" group, 8 affiliates in the "middle-sized" group, and 8 affiliates in the "small" group. This gave a total of 34 affiliates, or two-thirds of the 51 local affiliates in the state (see Table 2).

TABLE 2

FINAL DETERMINATION OF THE SAMPLE

	Large >20,000	Middle 5,000- 20,000	Small <5,000
Total Number of Districts	21	20	26
Number of FTP-NEA affiliates ^a (n=51)	27	12	12
Number of affiliates in those districts with support groups (n=21)	15	2	4
Number of affiliates randomly selected (n=13)	3	6	4
Total sample (n=34) ^b	18 ^c	8 ^c	8 ^c

^a This number may include more than one affiliate per district.

^b This number represents 2/3 of the total number of local FTP-NEA affiliates.

^c These numbers represent 2/3 of the total number of affiliates per group.

Collection of the Data

Because there were organizations with different administrative structures included in the study, different methods of distributing the questionnaires were necessary. The instrument was mailed to members of the Board of Directors of the Florida Teaching Profession-National Education Association in May of 1984 (see Appendix 8). Of the 30 requests made, 30 responses were obtained, or 100% of those sampled.

The United Faculty of Florida represents university personnel in Florida. The president of this organization was contacted with a request for a list of names and addresses of faculty representatives and board of directors members within the state (see Appendix 9). The members of this organization were contacted during the summer of 1984, and asked to respond to the survey form (see Appendix 10). Of 120 questionnaires sent, 69 (57.5%) were returned.

In May of 1984, the presidents of the local FTP-NEA affiliates in the sample and the affiliate at the Florida School for the Deaf and Blind were asked to distribute the questionnaires at building representatives' and board of directors' meetings (see appendices 11 and 12). Follow-up letters were sent during the summer of 1984 (see Appendix 13). Twenty-three, or 68% of these affiliates sampled, returned questionnaires (see Table 3).

Respondents were asked to complete the section on background information. Members were asked to rate each item, both merit pay evaluation and implementation factors, on the basis of a continuum: 1-strongly agree, 2-agree, 3-disagree, and 4-strongly disagree.

State board members and presidents of the local groups sampled were also asked to comment on their perceptions of merit pay, especially within their districts and Florida. Appendices 14 and 15 illustrate the forms used, and appendices 16 and 17 summarize the responses.

Analysis of the Data

Questionnaires were mailed to members of the FTP-NEA Board of Directors. Questionnaires were distributed to local boards of directors and local building representatives through the presidents of local FTP-NEA affiliates. Questionnaires were mailed to members of the United Faculty of Florida. Table 3 gives a summary of response rates.

Analysis of the data was completed in April of 1985. Percentages of responses on the questionnaire for the entire group sampled were recorded (see appendices 18 and 19).

The survey data were analyzed using the following subgroups: members from small, middle-sized and large districts; FTP-NEA Board of Directors members, local

FTP-NEA affiliate board of directors members, and local FTP-NEA affiliate building representatives; male and female members; black and white members; members within various age groups; members with various year of teaching experience; members with various college degrees; elementary teachers, secondary teachers, college professors, elementary support persons, and secondary support persons; secondary language arts, mathematics, science, social studies, fine arts, vocational teachers, and guidance counselors and media specialists.

The responses on each item for each subgroup were tested for significant differences, using a Chi-square test at the .05 level of significance. An examination of the contingency tables for each questionnaire item for each subgroup revealed several invalid Chi-square test results. Any test with a contingency table having one or more cells with an expected frequency less than five was considered to be an invalid test. In these cases, subgroups were combined (see Appendix 20). A new Chi-square test was performed in July of 1985. Analysis of this data was completed in the fall of 1985.

TABLE 3

PERCENTAGES OF RESPONSES

Group	Number Sent	Number Returned	Percentage Returned
Individual responses			
State Board	30	30	100%
UFF	120	69	57.5%
Affiliate responses			
Large	18	11	61.1%
Middle-sized	8	6	75%
Small	8	6	75%
Total of affiliates	34	23	68%

The findings of this study are presented in Chapter IV. Each hypothesis is examined, including those specific hypotheses which were accepted or rejected. Chapter V outlines the summary, conclusions, and recommendations of the study.

CHAPTER IV

FINDINGS AND ANALYSIS OF DATA

Background

The purposes of this study were to:

1. Review the literature to present the variety of definitions and descriptions of merit pay; outline historical aspects of the merit pay concept; discuss the various programs which have been used, are now being implemented, or are being proposed; and to identify those factors of merit pay evaluation and merit pay implementation which have been prevalent in merit pay rating systems.
2. Determine how merit pay evaluation factors are perceived by various members of the Florida Teaching Profession - National Education Association, and document substantial differences in perceptions among various subgroups of this group.
3. Determine how merit pay implementation factors are perceived by various members of the Florida Teaching Profession - National Education

Association, and document substantial differences in perceptions among various subgroups of this group.

In the Review of the Related Literature, Chapter II, a summary of the research on merit pay, not only for teachers, but also in industry, higher education, and educational administration, was presented. This review highlighted the previous trends related to the topic.

A survey instrument was developed to address the second and third purposes of this study (see Appendix 7). In order to determine how merit pay evaluation factors and implementation factors were perceived by various members of the Florida Teaching Profession - National Education Association, this survey form was distributed to a sample of the members of the local affiliates of the state organization.

The findings of this study are presented by examining each hypothesis. The data were analyzed using the original subgroups as described in the hypotheses with some modifications as described in the following sections, which are labeled for each hypotheses. In several cases, the original Chi-square test produced results which were invalid, (at least one cell in the contingency table had an expected frequency of less than five). In these cases, groups were combined and the data reanalyzed for those factors whose original tests were invalid (see Appendix

20). Although this second set of results was not generated from the original groups in the hypotheses, the reanalysis of the data provided additional insight into the concepts examined in the study.

Findings - Hypothesis 1

Hypothesis 1 stated: There will be no significant difference ($p > .05$) in the perceptions of merit pay evaluation factors and merit pay implementation factors among FTP-NEA members from small, middle-sized, and large districts. Table 4 illustrates the frequency and percentage of respondents within each category which were considered in the data analysis.

TABLE 4

FREQUENCY OF RESPONDENTS BY DISTRICT SIZE
ORIGINAL DATA ANALYSIS

District Size	^a	
	Frequency	Percent
Large	435	74.2%
Middle-sized	89	15.2%
Small	62	10.6%

^a 76 respondents, or 11.5% of the total sample, were members of the United Faculty of Florida or the state Board of Directors, and were not classified within the "large," "middle-sized," or "small" subgroups.

The original data analysis employed the categories of "large," "middle-sized," and "small" districts. When the original Chi-square test was administered with these three categories, one evaluation factor (#13) and no implementation factors were found to have significant differences at the .05 level.

Evaluation factor #13 was "number of days absent." Teachers in "middle-sized" and "small" districts favored the concept more frequently than those respondents in "large" districts (see Table 5).

TABLE 5

CHI-SQUARE TEST RESULTS - ORIGINAL DATA ANALYSIS
EVALUATION FACTOR #13 - NUMBER OF DAYS ABSENT
ANALYZED BY SIZE OF DISTRICT

District Size	Strongly		Strongly		Total
	Agree	Agree	Disagree	Disagree	
Large	37	115	135	139	426
	8.7%	27.0%	31.7%	32.6%	73.8%
Middle-sized	9	33	31	16	89
	10.1%	37.1%	34.8%	18.0%	15.4%
Small	10	22	18	12	62
	16.1%	35.5%	29.0%	19.4%	10.7%

n = 577

34.9
df = 6

p = 0.0238

2
X = 14.57538

There were six evaluation factors (#1, 3, 4, 5, 6, and 8) and 23 implementation factors (all but #5 and 11) which produced invalid tests (one or more cells of the contingency table with an expected frequency of less than 5). The original "middle-sized" and "small" groups were combined to form the "other" group. An additional analysis

of "large" and "other" responses was completed for these factors. Table 6 illustrates the frequency and percentage of respondents within each category which were considered in the second analysis.

TABLE 6

FREQUENCY OF RESPONDENTS BY DISTRICT SIZE
SECOND DATA ANALYSIS

District Size	Frequency ^a	Percent
Large	435	74.2%
Other	151	25.8%

^a 76 respondents, or 11.5% of the total sample, were members of the United Faculty of Florida or the state Board of Directors, and were not classified within the "large," "middle-sized," or "small" subgroups.

The results of the second data analysis provided no additional evaluation factors which were valid and significant. Implementation factors #2, 4, and 19 resulted in valid Chi-square tests which indicated a significant difference at the .05 level between the two groups.

There were 85.7% of all respondents who disagreed or strongly disagreed with implementation factor #2 (using a quota in a merit pay plan). However, those in larger districts were more strongly against the idea of a quota than those in middle-sized and small districts (see Table 7).

TABLE 7

CHI-SQUARE TEST RESULTS - SECOND DATA ANALYSIS
IMPLEMENTATION FACTOR #2 - THERE SHOULD BE SOME LIMIT OR
QUOTA ON THE NUMBER OF TEACHERS WHO MAY RECEIVE REWARDS.
ANALYZED BY SIZE OF DISTRICT

District size	Strongly		Strongly		Total
	Agree	Agree	Disagree	Disagree	
Large	26	36	84	283	429
	6.1%	8.4%	19.6%	66.0%	74.1%
Other	8	13	55	74	150
	5.3%	8.7%	36.7%	49.3%	25.9%

n = 579

df = 3

p = 0.0003

$$\chi^2 = 18.61279$$

There were 89.1% of the respondents who agreed or strongly agreed that "the program should include all classroom teachers, counselors, media specialists, and resource teachers" (implementation factor #4). Again, respondents from large districts felt more strongly about this factor (see Table 8).

TABLE 8

CHI-SQUARE TEST RESULTS - SECOND DATA ANALYSIS
IMPLEMENTATION FACTOR #4 - THE PROGRAM SHOULD INCLUDE ALL
CLASSROOM TEACHERS, COUNSELORS, MEDIA SPECIALISTS,
AND RESOURCE TEACHERS.
ANALYZED BY SIZE OF DISTRICT

District Size	Strongly		Strongly		Total
	Agree	Agree	Disagree	Disagree	
Large	313	67	26	22	428
	73.1%	15.7%	6.1%	5.1%	74.0%
Other	97	38	6	9	150
	64.7%	25.3%	4.0%	6.0%	26.0%

n = 578

df = 3

p = 0.0488

$\chi^2 = 7.86675$

The data analysis revealed 90.0% of respondents who agreed or strongly agreed that "funds should be made available for the training of evaluators" (implementation factor #19). However, respondents from large districts were more strongly in favor of making these funds available (see Table 9).

TABLE 9

CHI-SQUARE TEST RESULTS - SECOND DATA ANALYSIS
IMPLEMENTATION FACTOR #19 - FUNDS SHOULD BE MADE AVAILABLE
FOR THE TRAINING OF EVALUATORS.
ANALYZED BY SIZE OF DISTRICT

District Size	Strongly		Strongly		Total
	Agree	Agree	Disagree	Disagree	
Large	268	117	18	21	424
	63.2%	27.6%	4.2%	5.0%	74.3%
Other	67	67	4	9	147
	45.6%	45.6%	2.7%	6.1%	25.7%

n = 571

df = 3

p = 0.0005

$$\chi^2 = 17.68031$$

Findings - Hypothesis 2

Hypothesis 2 stated: There will be no significant differences ($p > .05$) in the perceptions of merit pay evaluation factors and merit pay implementation factors among state FTP-NEA board members, local FTP-NEA affiliate board members, and local FTP-NEA affiliate building representatives. Table 10 illustrates the frequency and percentage of respondents within each category which were considered in the original data analysis.

TABLE 10

FREQUENCY OF RESPONDENTS BY POSITION IN ORGANIZATION
ORIGINAL DATA ANALYSIS

Position	Frequency ^a	Percent
Building Representative	298	55.0%
Local and State Board	13	2.4%
Local Board Member	66	12.2%
Other	80	14.8%
Building Representative and		
Local Board Member	17	3.1%
State Board Member	17	3.1%
Teacher	51	9.4%

^a 120 respondents, or 18.1% of the total sample, did not give background information for this category and were not classified within these subgroups.

Although the hypothesis called for comparisons among three groups (state FTP-NEA board members, local FTP-NEA affiliate board members, and local FTP-NEA affiliate building representatives), the returned questionnaires indicated that several respondents were members of more than one subgroup. The perceptions of members belonging to two groups might have varied from the opinions of members

in either of the two groups separately. To address this concern, the categories of "Building Representative," "Local and State Board Member," "Local Board Member," "Other," "Building Representative and Local Board Member," "State Board Member," and "Teacher" were used in the data analysis. When the original Chi-square test was administered using these seven categories, all evaluation factors and all implementation factors produced invalid test results (one or more cells of the contingency table with an expected frequency of less than 5).

The data were regrouped in an effort to obtain valid test results. The categories of "Other" and "Teacher" were eliminated, as these had not been considered in the original hypothesis. The group labeled "Building Representatives" was retained. "Local and State Board Member," "Local Board Member," "Building Representative and Local Board Member," and "State Board Member" were combined to form a new category called "Boards of Directors." The original hypothesis was to compare building representatives, local board members, and state board members. There were too few state board members, so this second data analysis compared building representatives with any board member (regardless of whether they also served as a building representative). The breakdown on numbers of responses in the final analysis is in Table 11.

TABLE 11

FREQUENCY OF RESPONDENTS BY POSITION IN ORGANIZATION
SECOND DATA ANALYSIS

Position	a	
	Frequency	Percent
Building Representative	298	72.5%
Board Member	113	27.5%

^a 251 respondents, or 37.9% of the total sample, did not give background information for this category and were not classified within these groups.

There were two evaluation factors which resulted in valid Chi-square tests showing significant differences between groups at the .05 level of significance. These were items #3 and 15.

Only 25.9% of the respondents either strongly agreed or agreed that "additional advanced degrees" (evaluation factor #3) should be used as a factor in determining merit pay. A higher percentage of board members than building representatives felt that this should be a factor (see Table 12).

TABLE 12

CHI-SQUARE TEST RESULTS - SECOND DATA ANALYSIS
EVALUATION FACTOR #3 - ADDITIONAL ADVANCED DEGREES
ANALYZED BY POSITION IN ORGANIZATION

Position	Strongly		Strongly		Total
	Agree	Agree	Disagree	Disagree	
Building	16	50	89	138	293
Representative	5.5%	17.1%	30.4%	47.1%	72.9%
Board Member	15	23	28	43	109
	13.8%	21.1%	25.7%	39.4%	27.1%

n = 402

df = 3

p = 0.0239

$$\chi^2 = 9.44332$$

The use of "administrator observations/evaluations" (evaluation factor #15) was agreed or strongly agreed upon by 70.5% of the respondents. However, building representative opinions were more in favor of the factor than the opinions of board members (see Table 13).

TABLE 13

CHI-SQUARE TEST RESULTS - SECOND DATA ANALYSIS
EVALUATION FACTOR #15 - ADMINISTRATOR
OBSERVATIONS/EVALUATIONS
ANALYZED BY POSITION IN ORGANIZATION

Position	Strongly		Strongly		Total
	Agree	Agree	Disagree	Disagree	
Building	47	172	41	37	297
Representative	15.8%	57.9%	13.8%	12.5%	73.0%
Board Member	8	60	27	15	110
	7.3%	54.5%	24.5%	13.6%	27.0%

n = 407

df = 3

p = 0.0175

 $\chi^2 = 10.13395$

When the original groups were combined, only implementation factor #21 (A committee of evaluators should be primarily from within the teacher's district.) showed a significant difference among groups at the .05 level. Building representatives felt more strongly than board members about using a local committee for evaluation purposes although 75.3% of the total sample agreed or strongly agreed with this statement (see Table 14).

TABLE 14

CHI-SQUARE TEST RESULTS - SECOND DATA ANALYSIS
 IMPLEMENTATION FACTOR #21 - A COMMITTEE OF EVALUATORS
 SHOULD BE PRIMARILY FROM WITHIN THE TEACHER'S DISTRICT.
 ANALYZED BY POSITION IN ORGANIZATION

Position	Strongly		Strongly		Total
	Agree	Agree	Disagree	Disagree	
Building	113	118	40	21	292
Representative	38.7%	40.4%	13.7%	7.2%	73.4
Board Member	32	37	29	8	106
	30.2%	34.9%	27.4%	7.5%	26.6%

n = 398

df = 3

p = 0.0145

 $\chi^2 = 10.53472$

Findings - Hypothesis 3

Hypothesis 3 stated: There will be no significant differences ($p > .05$) in the perceptions of merit pay evaluation factors and merit pay implementation factors between male and female FTP-NEA members. Table 15 illustrates the frequency and percentage of respondents within each category which were considered in the data analysis.

TABLE 15

FREQUENCY OF RESPONDENTS BY SEX

Sex	Frequency ^a	Percent
Male	195	30.0%
Female	456	70.0%

^a 11 respondents, or 1.7% of the total sample, did not give background information on sex and were not included in the data analysis.

When the Chi-square test was administered, there were five evaluation factors (#2, 3, 6, 13, and 15) which produced valid tests with a significant difference at the .05 level of significance. There were five implementation factors which produced valid Chi-square tests with significant results at the .05 level of significance. Those were factors #3, 7, 8, 11, and 24.

Males felt more strongly than females that a "master's degree" (evaluation factor #2) should be used to pay merit pay recipients. However, the total group agreed or strongly agreed only 35.8% of the time, so the total sample did not seem to consider a master's degree to be a strong factor in merit pay evaluation (see Table 16).

TABLE 16

CHI-SQUARE TEST RESULTS
EVALUATION FACTOR #2 - MASTER'S DEGREE
ANALYZED BY SEX

Sex	Strongly		Strongly		Total
	Agree	Agree	Disagree	Disagree	
Male	28	55	44	63	190
	14.7%	28.9%	23.2%	33.2%	29.6%
Female	58	89	125	180	452
	12.8%	19.7%	27.7%	39.8%	70.4%

n = 642

df = 3

p = 0.0446

 $\chi^2 = 8.07073$

Again, males felt more strongly than females that "additional advanced degrees" (evaluation factor #3) should be considered. With this item, the entire group agreed or strongly agreed only 29.1% of the time (see Table 17).

TABLE 17

CHI-SQUARE TEST RESULTS
EVALUATION FACTOR #3 - ADDITIONAL ADVANCED DEGREES
ANALYZED BY SEX

Sex	Strongly		Strongly		Total
	Agree	Agree	Disagree	Disagree	
Male	30	47	53	62	192
	15.6%	24.5%	27.6%	32.3%	30.2%
Female	30	78	130	206	444
	6.8%	17.6%	29.3%	46.4%	69.8%

n = 636

df = 3

p = 0.0001

$$\chi^2 = 20.89073$$

The entire sample disagreed or strongly disagreed in 80.6% of the cases that "standardized teacher test scores" (evaluation factor #6) should be considered for evaluation purposes. However, females disagreed more than males (see Table 18).

TABLE 18

CHI-SQUARE TEST RESULTS
EVALUATION FACTOR #6 - STANDARDIZED TEACHER TEST SCORES
ANALYZED BY SEX

Sex	Strongly		Strongly		Total
	Agree	Agree	Disagree	Disagree	
Male	3	33	54	101	191
	1.6%	17.3%	28.3%	52.9%	29.9%
Female	9	45	113	281	448
	2.0%	10.0%	25.2%	62.7%	70.1%

n = 639

df = 3

p = 0.0364

$$\chi^2 = 8.52279$$

Females felt more strongly that the "number of days absent" (evaluation factor #13) should be used in determining merit pay recipients. However, only 37.9% of the total group agreed or strongly agreed that this factor should be considered (see Table 19).

TABLE 19

CHI-SQUARE TEST RESULTS
EVALUATION FACTOR #13 - NUMBER OF DAYS ABSENT
ANALYZED BY SEX

Sex	Strongly		Strongly		Total
	Agree	Agree	Disagree	Disagree	
Male	23	42	62	62	189
	12.2%	22.2%	32.8%	32.8%	29.4%
Female	36	142	152	123	453
	7.9%	31.3%	33.6%	27.2%	70.6%

n = 642

df = 3

p = 0.0468

$$\chi^2 = 7.96178$$

Of all respondents, 74.1% strongly agreed or agreed that "administrator observations/evaluations" (evaluation factor #15) should be considered in determining merit pay recipients. However, females were more in favor of this factor than males (see Table 20).

TABLE 20

CHI-SQUARE TEST RESULTS
EVALUATION FACTOR #15 - ADMINISTRATOR
OBSERVATIONS/EVALUATIONS
ANALYZED BY SEX

Sex	Strongly		Strongly		Total
	Agree	Agree	Disagree	Disagree	
Male	25	96	46	25	192
	13.0%	50.0%	24.0%	13.0%	29.9%
Female	88	267	54	41	450
	19.6%	59.3%	12.0%	9.1%	70.1%

n = 642

df = 3

p = 0.0002

$$\chi^2 = 19.69484$$

There were 91.4% of all respondents who agreed or strongly agreed that "the program should be voluntary, and every teacher should be eligible" (implementation factor #3). However, females agreed with this statement more often than males (see Table 21).

TABLE 21

CHI-SQUARE TEST RESULTS
 IMPLEMENTATION FACTOR #3 - THE PROGRAM SHOULD BE VOLUNTARY,
 AND EVERY TEACHER SHOULD BE ELIGIBLE TO APPLY.
 ANALYZED BY SEX

Sex	Strongly		Strongly		Total
	Agree	Agree	Disagree	Disagree	
Male	127	47	5	14	193
	65.8%	24.4%	2.6%	7.3%	30.2%
Female	310	101	24	12	447
	69.4%	22.6%	5.4%	2.7%	69.8%

n = 640

df = 3

p = 0.0218

 $\chi^2 = 9.65286$

The respondents as a group disagreed or strongly disagreed 82.5% of the time that "teachers in shortage areas (such as math and science) should be paid more" (implementation factor #7). However, females disagreed more strongly with the use of this evaluation factor than males (see Table 22).

TABLE 22

CHI-SQUARE TEST RESULTS
IMPLEMENTATION FACTOR #7 - TEACHERS IN SHORTAGE AREAS
(SUCH AS MATH AND SCIENCE) SHOULD BE PAID MORE.
ANALYZED BY SEX

Sex	Strongly		Strongly		Total
	Agree	Agree	Disagree	Disagree	
Male	16	34	51	90	191
	8.4%	17.8%	26.7%	47.1%	29.9%
Female	16	46	148	237	447
	3.6%	10.3%	33.1%	53.0%	70.1%

n = 639

df = 3

p = 0.0020

$$\chi^2 = 14.83081$$

Implementation factor #8 (Teachers in alternative schools/programs should be paid more) produced similar results. Of all respondents, there were 75.5% who disagreed or strongly disagreed with this statement, with females feeling more strongly than males that this factor not be used for merit pay purposes (see Table 23).

TABLE 23

CHI-SQUARE TEST RESULTS
IMPLEMENTATION FACTOR #8 - TEACHERS IN ALTERNATIVE
SCHOOLS/PROGRAMS SHOULD BE PAID MORE.
ANALYZED BY SEX

Sex	Strongly		Strongly		Total
	Agree	Agree	Disagree	Disagree	
Male	7	48	68	64	187
	3.7%	25.7%	36.4%	34.2%	29.9%
Female	29	69	157	183	438
	6.6%	15.8%	35.8%	41.8%	70.1%

n = 625

df = 3

p = 0.0137

$$\chi^2 = 10.66927$$

According to 69.0% of the respondents who agreed or strongly agreed with the statement, programs for rewarding teachers should be developed at the district level (implementation factor #11). Females, however, felt more strongly than males that programs should be developed locally (see Table 24).

TABLE 24

CHI-SQUARE TEST RESULTS
 IMPLEMENTATION FACTOR #11 - PROGRAMS FOR REWARDING
 TEACHERS SHOULD BE DEVELOPED AT THE DISTRICT LEVEL.
 ANALYZED BY SEX

Sex	Strongly		Strongly		Total
	Agree	Agree	Disagree	Disagree	
Male	50	62	40	32	184
	27.2%	33.7%	21.7%	17.4%	29.6%
Female	141	176	70	51	438
	32.2%	40.2%	16.0%	11.6%	70.4%

n = 622

df = 3

p = 0.0435

$$\chi^2 = 8.12346$$

Respondents felt very strongly that "all records of evaluations should be confidential" (implementation factor #24), with 93.3% answering "agree" or "strongly agree" to this statement. Females agreed more often with this factor than males (see Table 25).

TABLE 25

CHI-SQUARE TEST RESULTS
 IMPLEMENTATION FACTOR #24 - ALL RECORDS OF EVALUATIONS
 SHOULD BE CONFIDENTIAL.
 ANALYZED BY SEX

Sex	Strongly			Strongly	Total
	Agree	Agree	Disagree	Disagree	
Male	125	43	11	12	191
	65.4%	22.5%	5.8%	6.3%	30.1%
Female	321	103	7	12	443
	72.5%	23.3%	1.6%	2.7%	69.9%

n = 634

df = 3

p = 0.0034

$$\chi^2 = 13.67784$$

Findings - Hypothesis 4

Hypothesis 4 stated: There will be no significant differences ($p > .05$) in the perceptions of merit pay evaluation factors and merit pay implementation factors between black and white FTP-NEA members. Table 26 illustrates the frequency and percentage of respondents within each category which were considered in the data analysis.

TABLE 26

FREQUENCY OF RESPONDENTS BY RACE

Race	^a	
	Frequency	Percent
Black	65	10.1%
White	577	89.9%

^a 20 respondents, or 3.0% of the total sample, did not give background information on race and were not included in this data analysis.

Evaluation factor #10 (conducting workshops/making presentations at county, state or national meetings) produced a Chi-square test result which was significant at the .05 level of confidence. This factor was agreed or strongly agreed upon by 46.1% of the respondents. Whites gave a stronger positive response to this item than blacks did (see Table 27).

TABLE 27

CHI-SQUARE TEST RESULTS
EVALUATION FACTOR #10 - CONDUCTING WORKSHOPS/MAKING
PRESENTATIONS AT COUNTY, STATE OR NATIONAL MEETINGS
ANALYZED BY RACE

Race	Strongly		Strongly		Total
	Agree	Agree	Disagree	Disagree	
Black	2	27	24	12	65
	3.1%	41.5%	36.9%	18.5%	10.2%
White	82	182	186	121	571
	14.4%	31.9%	32.6%	21.2%	89.8%

n = 636

df = 3

p = 0.0497

$$\chi^2 = 7.82661$$

There were no other evaluation factors which resulted in valid, significant tests. There were no implementation factors resulting in valid, significant Chi-square test results.

Findings - Hypothesis 5

Hypothesis 5 stated: There will be no significant differences ($p > .05$) in the perceptions of merit pay evaluation factors and merit pay implementation factors among FTP-NEA members of different ages. Table 28 illustrates the frequency and percentage of respondents within each category which were considered in the data analysis.

TABLE 28

FREQUENCY OF RESPONDENTS BY AGE
ORIGINAL DATA ANALYSIS

Age Group	^a	
	Frequency	Percent
20-30 years old	74	11.4%
31-40 years old	261	40.1%
41-50 years old	186	28.6%
over 50 years old	130	20.0%

^a 11 respondents, or 1.7% of the total sample, did not give background information on age, and were not included in the data analysis.

A Chi-square test was administered using the characteristic of "age of respondent." The subgroups included those members whose age fell within the following categories: 20 to 30 years old, 31 to 40 years old, 41 to 50 years old, and over 50 years old.

There were three evaluation factors (#1, 2, and 11) which gave valid test results with significant differences among groups at the .05 level of significance. Implementation factors #5 and 11 resulted in valid test results which were significant at the .05 level of confidence.

The respondents as a group felt strongly that teachers should receive merit pay according to "teaching experience/number of years teaching" (evaluation factor #1). They answered "strongly agree" or "agree" 79.0% of the time. As age increased, the frequency of agreement on this factor also increased (see Table 29).

TABLE 29

CHI-SQUARE TEST RESULTS - ORIGINAL DATA ANALYSIS
 EVALUATION FACTOR #1 - TEACHING EXPERIENCE/
 NUMBER OF YEARS TEACHING
 ANALYZED BY AGE OF RESPONDENT

Age Group	Strongly		Strongly		Total
	Agree	Agree	Disagree	Disagree	
20-30 years old	20	36	12	5	73
	27.4%	49.3%	16.4%	6.8%	11.4%
31-40 years old	66	131	34	24	255
	25.9%	51.4%	13.3%	9.4%	39.9%
41-50 years old	80	64	27	13	184
	43.5%	34.8%	14.7%	7.1%	28.8%
over 50 years old	56	52	7	12	127
	44.1%	40.9%	5.5%	9.4%	19.9%

n = 639

df = 9

p = 0.0006

$$\chi^2 = 29.27718$$

Evaluation factor #2 (master's degree) was disagreed or strongly disagreed upon by 63.9% of the respondents,

but there was a significant difference among age groups, with the younger teachers disagreeing more strongly than the senior teachers (see Table 30).

TABLE 30

CHI-SQUARE TEST RESULTS - ORIGINAL DATA ANALYSIS
EVALUATION FACTOR #2 - MASTER'S DEGREE
ANALYZED BY AGE OF RESPONDENT

Age Group	Strongly		Strongly		Total
	Agree	Agree	Disagree	Disagree	
20-30 years old	4	13	18	39	74
	5.4%	17.6%	24.3%	52.7%	11.5%
31-40 years old	31	58	78	90	257
	12.1%	22.6%	30.4%	35.0%	40.1%
41-50 years old	31	39	42	72	184
	16.8%	21.2%	22.8%	39.1%	28.7%
over 50 years old	21	34	32	39	126
	16.7%	27.0%	25.4%	31.0%	19.7%

n = 641

df = 9

p = 0.0400

 $\chi^2 = 17.60622$

The use of "job-related extra-curricular duties" (evaluation factor #11) was agreed or strongly agreed upon as an evaluation factor by 56.1% of respondents. There was a significant difference among group responses, with those in the "31 to 40 years old" group showing a preference for this evaluation factor (see Table 31).

TABLE 31

CHI-SQUARE TEST RESULTS - ORIGINAL DATA ANALYSIS
EVALUATION FACTOR #11 - JOB-RELATED EXTRACURRICULAR DUTIES
ANALYZED BY AGE OF RESPONDENT

Age Group	Strongly		Strongly		Total
	Agree	Agree	Disagree	Disagree	
20-30 years old	4	33	25	12	74
	5.4%	44.6%	33.8%	16.2%	11.5%
31-40 years old	46	114	58	38	256
	18.0%	44.5%	22.7%	14.8%	39.8%
41-50 years old	34	62	48	41	185
	18.4%	33.5%	25.9%	22.2%	28.7%
over 50 years old	24	44	36	25	129
	18.6%	34.1%	27.9%	19.4%	20.0%

n = 644

df = 9

p = 0.0387

$$\chi^2 = 17.71048$$

There were 77.1% of all respondents who agreed or strongly agreed that "teachers who receive extra pay should not be expected to take on extra duties" (implementation factor #5). There was a significant difference in responses among age groups. Those respondents in the "20 to 30 years old" group and the "41 to 50 years old" group felt more strongly that extra duties should not be required of merit pay recipients (see Table 32).

TABLE 32

CHI-SQUARE TEST RESULTS - ORIGINAL DATA ANALYSIS
 IMPLEMENTATION FACTOR #5 - TEACHERS WHO RECEIVE EXTRA PAY
 SHOULD NOT BE EXPECTED TO TAKE ON EXTRA DUTIES.
 ANALYZED BY AGE OF RESPONDENT

Age Group	Strongly		Strongly		Total
	Agree	Agree	Disagree	Disagree	
20-30 years old	38	25	7	3	73
	52.1%	34.2%	9.6%	4.1%	11.5%
31-40 years old	131	58	41	24	254
	51.6%	22.8%	16.1%	9.4%	40.1%
41-50 years old	98	48	14	20	180
	54.4%	26.7%	7.8%	11.1%	28.4%
over 50 years old	62	28	14	22	126
	49.2%	22.2%	11.1%	17.5%	19.9%

n = 633

df = 9

p = 0.0232

 $\chi^2 = 19.24525$

There was a significant difference among age groups for implementation factor #11 (Programs for rewarding teachers should be developed at the district level). The group of respondents from 41 to 50 years of age agreed or strongly agreed with this factor more than those in the other three groups (see Table 33).

TABLE 33

CHI-SQUARE TEST RESULTS - ORIGINAL DATA ANALYSIS
 IMPLEMENTATION FACTOR #11 - PROGRAMS FOR REWARDING TEACHERS
 SHOULD BE DEVELOPED AT THE DISTRICT LEVEL.
 ANALYZED BY AGE OF RESPONDENT

Age Group	Strongly		Strongly		Total
	Agree	Agree	Disagree	Disagree	
20-30 years old	19	27	18	6	70
	27.1%	38.6%	25.7%	8.6%	11.3%
31-40 years old	69	95	50	37	251
	27.5%	37.8%	19.9%	14.7%	40.4%
41-50 years old	62	75	15	25	177
	35.0%	42.4%	8.5%	14.1%	28.5%
over 50 years old	40	42	26	16	124
	32.3%	33.9%	21.0%	12.9%	19.9%

n = 622

df = 9

p = 0.0356

 $\chi^2 = 17.96688$

The "20 to 30 years old" group and the "31 to 40 years old" group were combined to form a new, larger group and the "41 to 50 years old" group and the "over 50 years old" group formed a second new group. Table 34 shows the subsequent breakdown of respondents for each of these groups.

TABLE 34

FREQUENCY OF RESPONDENTS BY AGE
SECOND DATA ANALYSIS

Age Group	Frequency ^a	Percent
20-40 years old	335	51.5%
over 40 years old	316	48.5%

^a 11 respondents, or 1.7% of the original sample did not give background information on age and were not included in the data analysis.

A second Chi-square test was performed using the new subgroups. Evaluation factor #5 produced a valid, significant test after the second analysis. Implementation factors #1 and 20 also produced valid Chi-square test

results which were significant at the 0.05 level of significance.

Evaluation factor #5 (standardized student test scores, by school) produced a valid test with a significant difference in the responses between the two groups. Although 80.3% disagreed or strongly disagreed with this factor, those in the "over 40 years old" group disagreed more strongly (see Table 35).

TABLE 35

CHI-SQUARE TEST RESULTS - SECOND DATA ANALYSIS
EVALUATION FACTOR #5 - STANDARDIZED STUDENT TEST SCORES,
BY SCHOOL
ANALYZED BY AGE OF RESPONDENT

Age Group	Strongly		Strongly		Total
	Agree	Agree	Disagree	Disagree	
20 - 40 years old	7	50	83	169	309
	2.3%	16.2%	26.9%	54.7%	48.4%
over 40 years old	5	28	85	212	330
	1.5%	8.5%	25.8%	64.2%	51.6%

n = 639

df = 3

p = 0.0132

$\chi^2 = 10.73674$

An overwhelming 95.8% of respondents agreed or strongly agreed that "all teachers should receive more money before any teacher is rewarded" (implementation factor #1). Teachers in the "over 40 years old" group felt more strongly about this (see Table 36).

TABLE 36

CHI-SQUARE TEST RESULTS - SECOND DATA ANALYSIS
IMPLEMENTATION FACTOR #1 - ALL TEACHERS SHOULD RECEIVE MORE
MONEY BEFORE ANY TEACHER IS REWARDED.
ANALYZED BY AGE OF RESPONDENT

Age Group	Strongly		Strongly		Total
	Agree	Agree	Disagree	Disagree	
20 - 40 years old	247	31	16	16	310
	79.7%	10.1%	5.2%	5.2%	48.1%
over 40 years old	293	27	7	7	334
	87.7%	8.1%	2.1%	2.1%	51.9%

n = 644

df = 3

p = 0.0158

$\chi^2 = 10.35782$

There was a greater percentage of respondents over 40 years of age who agreed or strongly agreed that "there should be a committee of evaluators, rather than one administrator" (implementation factor #20) (see Table 37). The entire group felt very strongly that a committee should perform the evaluations.

TABLE 37

CHI-SQUARE TEST RESULTS - SECOND DATA ANALYSIS
IMPLEMENTATION FACTOR #20 - THERE SHOULD BE A COMMITTEE
OF EVALUATORS, RATHER THAN ONE ADMINISTRATOR.
ANALYZED BY AGE OF RESPONDENT

Age Groups	Strongly		Strongly		Total
	Agree	Agree	Disagree	Disagree	
20 - 40 years old	201	74	17	14	306
	65.7%	24.2%	5.6%	4.6%	48.3%
over 40 years old	213	97	15	3	328
	64.9%	29.6%	4.6%	0.9%	51.7%

n = 634

df = 3

p = 0.0191

 $\chi^2 = 9.93259$

Findings - Hypothesis 6

Hypothesis 6 stated: There will be no significant differences ($p > .05$) in the perceptions of merit pay evaluation factors and merit pay implementation factors among FTP-NEA members with various years of experience. Table 38 illustrates the frequency and percentage of respondents within each category which were considered in the data analysis.

TABLE 38

FREQUENCY OF RESPONDENTS BY YEARS OF EXPERIENCE
ORIGINAL DATA ANALYSIS

Years of Experience	Frequency ^a	Percent
0 - 5 years	71	10.9%
6 - 10 years	151	23.2%
11 - 15 years	169	25.9%
over 15 years	261	40.0%

^a 10, or 1.5% of the total sample, did not give background information on years of experience and were not included in the data analysis.

The original data analysis used the subgroups of "0 to 5 years of experience," "6 to 10 years of experience," "11 to 15 years of experience," and "more than 15 years of experience." The Chi-square test resulted in two evaluation factors (#1 and 7) and one implementation factor (#5) with valid and significant test results at the .05 level of significance.

Evaluation factor #1 was "teaching experience/number of years teaching." The percentage of respondents answering "agree" or "strongly agree" increased steadily within the age groups until the highest total (85.6%) was evident in the "over 15 years of experience" group. There was a significant difference among groups of respondents on this item (see Table 39).

TABLE 39

CHI-SQUARE TEST RESULTS - ORIGINAL DATA ANALYSIS
 EVALUATION FACTOR #1 - TEACHING EXPERIENCE/NUMBER OF
 YEARS TEACHING
 ANALYZED BY YEARS OF EXPERIENCE

Years Experience	Strongly		Strongly		Total
	Agree	Agree	Disagree	Disagree	
0 - 5 years	18	31	15	5	69
	26.1%	44.9%	21.7%	7.2%	10.8%
6 - 10 years	38	74	26	10	148
	25.7%	50.0%	17.6%	6.8%	23.1%
11 - 15 years	46	79	21	20	166
	27.7%	47.6%	12.7%	12.0%	25.9%
over 15 years	120	100	18	19	257
	46.7%	38.9%	7.0%	7.4%	40.2%

n = 640

df = 9

p = 0.0000

 $\chi^2 = 38.59491$

There was a significant difference among responses on evaluation factor #7 (inservice participation/points earned). Those FTP-NEA members with 11 to 15 years of experience responded "agree/strongly agree" less often than the other subgroups (50.6%), while those with over 15 years experience responded most frequently (63.1%) that this evaluation factor should be considered in a merit pay plan (see Table 40).

TABLE 40

CHI-SQUARE TEST RESULTS - ORIGINAL DATA ANALYSIS
 EVALUATION FACTOR #7 - INSERVICE PARTICIPATION/
 POINTS EARNED
 ANALYZED BY YEARS OF EXPERIENCE

Years Experience	Strongly		Strongly		Total
	Agree	Agree	Disagree	Disagree	
0 - 5 years	7	29	20	12	68
	10.3%	42.6%	29.4%	17.6%	10.7%
6 - 10 years	11	73	43	21	148
	7.4%	49.3%	29.1%	14.2%	23.2%
11 - 15 years	19	65	41	41	166
	11.4%	39.2%	24.7%	24.7%	26.1%
over 15 years	45	116	48	46	255
	17.6%	45.5%	18.8%	18.0%	40.0%

n = 637

df = 9

p = 0.0143

 $\chi^2 = 20.65567$

Implementation factor #5 (Teachers who receive extra pay should not be expected to take on extra duties) received significantly different responses among the four subgroups. The respondents as a group agreed or strongly agreed with this statement 77.2% of the time. However, those respondents with less than 10 years of experience felt more strongly than those with more than 10 years experience that teachers should not be expected to take on extra duties (see Table 41).

TABLE 41

CHI-SQUARE TEST RESULTS - ORIGINAL DATA ANALYSIS
 IMPLEMENTATION FACTOR #5 - TEACHERS WHO RECEIVE EXTRA PAY
 SHOULD NOT BE EXPECTED TO TAKE ON EXTRA DUTIES.
 ANALYZED BY YEARS OF EXPERIENCE

Years Experience	Strongly		Strongly		Total
	Agree	Agree	Disagree	Disagree	
0 - 5 years	33	22	8	5	68
	48.5%	32.4%	11.8%	7.4%	10.7%
6 - 10 years	83	41	17	8	149
	55.7%	27.5%	11.4%	5.4%	23.5%
11 - 15 years	86	34	27	17	164
	52.4%	20.7%	16.5%	10.4%	25.9%
over 15 years	128	62	24	39	253
	50.6%	24.5%	9.5%	15.4%	39.9%

n = 634

df = 9

p = 0.0405

 $\chi^2 = 17.57059$

There were three evaluation factors (#4, 5, and 6) which originally resulted in invalid tests. Twenty-three implementation factors (all but #5 and 11) produced invalid test results.

The four original groups were combined to form two larger groups. These groups included those members with "less than 11 years of experience" and those with "11 or more years of experience." Table 42 shows the breakdown of respondents for each of these new groups.

TABLE 42

FREQUENCY OF RESPONDENTS BY YEARS OF EXPERIENCE
SECOND DATA ANALYSIS

Years of Experience	Frequency ^a	Percent
0 - 10 years	222	34.0%
more than 10 years	430	66.0%

^a 10, or 1.5% of the total sample, are not included in this data analysis.

When the Chi-square test was performed on the factors with previously invalid tests, there were no new cases of significant differences. Evaluation factor #5 and

implementation factors #9, 10, 12, 18, 22, 23, and 25 continued to produce invalid Chi-square test results.

Findings - Hypothesis 7

Hypothesis 7 stated: There will be no significant differences ($p > .05$) in the perceptions of merit pay evaluation factors and merit pay implementation factors among FTP-NEA members whose highest college degree is an associate degree, a bachelor's degree, a master's degree, a specialist degree, a doctorate degree, or no college degree. Table 43 illustrates the frequency and percentage of respondents within each category which were considered in the data analysis.

TABLE 43

FREQUENCY OF RESPONDENTS BY HIGHEST DEGREE EARNED
ORIGINAL DATA ANALYSIS

Highest Degree	Frequency ^a	Percent
None	3	0.5%
Associate	6	0.9%
Bachelor's	264	40.4%
Master's	305	46.7%
Specialist	19	2.9%
Doctorate	56	8.6%

^a 9 respondents, or 14% of the total sample, did not give background information on highest degree earned and were not included in the data analysis.

The original Chi-square test used the groups of respondents of "no degree," "associate degree," "bachelor's degree," "master's degree," "specialist degree," and "doctorate degree." The original analysis produced no valid Chi-square test results for evaluation factors or implementation factors.

The groups were combined to form three new groups. Those with no degree were eliminated from analysis. Those

with associate or bachelor's degrees formed a new group called "bachelor's degree." The "master's" group was not modified. Those with a specialist or doctorate degree became a group called "doctorate degree." Table 44 shows the percentage of respondents in each group for the second data analysis.

TABLE 44

FREQUENCY OF RESPONDENTS BY HIGHEST DEGREE EARNED
SECOND DATA ANALYSIS

Highest Degree	Frequency ^a	Percent
Bachelor's	270	41.5%
Master's	305	46.9%
Doctorate	75	11.5%

^a 12 respondents, or 1.8% of the total sample, did not give background information on highest degree earned and were not included in the data analysis.

When the Chi-square test was readministered, there were three evaluation factors (#2, 3, and 10) which gave valid tests with significant results at the .05 level of confidence. When the new groups were considered, there

were no implementation factors with valid, significant results. All factors except #13 were still invalid.

The use of a "master's degree" (evaluation factor #2) was disagreed or strongly disagreed upon more frequently by those respondents in the "bachelor's" category (84.1%). The item was disagreed upon least frequently by those in the "doctorate" category (24.0%) (see Table 45).

TABLE 45

CHI-SQUARE TEST RESULTS - SECOND DATA ANALYSIS
EVALUATION FACTOR #2 - MASTER'S DEGREE
ANALYZED BY HIGHEST DEGREE EARNED

Highest Degree	Strongly Agree	Agree	Disagree	Strongly Disagree	Total
Bachelor's	11 4.1%	32 11.9%	58 21.6%	168 62.5%	269 42.0%
Master's	19 26.8%	35 49.3%	7 9.9%	10 14.1%	71 11.1%
Doctorate	57 19.0%	77 25.7%	103 34.3%	63 21.0%	300 46.9%

n = 640

df = 6

p = 0.0

$$\chi^2 = 164.31075$$

Those in the "doctorate" group responded negatively 33.8% of the time. Of those in the "bachelor's" group, 83.8% gave "disagree" or "strongly disagree" answers (see Table 46).

TABLE 46

CHI-SQUARE TEST RESULTS - SECOND DATA ANALYSIS
EVALUATION FACTOR #3 - ADDITIONAL ADVANCED DEGREES
ANALYZED BY HIGHEST DEGREE EARNED

Highest Degree	Strongly Agree	Agree	Disagree	Strongly Disagree	Total
Bachelor's	5 1.9%	38 14.3%	65 24.4%	158 59.4%	266 42.0%
Master's	22 31.0%	25 35.2%	16 22.5%	8 11.3%	71 11.2%
Doctorate	33 11.1%	62 20.9%	101 34.0%	101 34.0%	297 46.8%

n = 634

df = 6

p = 0.0000

$$\chi^2 = 109.68185$$

Evaluation factor #10 was "conducting workshops/making presentations at county, state or national meetings." This factor received fewer "disagree" or "strongly disagree" responses from those in the "doctorate" group than in the other two groups (see Table 47).

TABLE 47

CHI-SQUARE TEST RESULTS - SECOND DATA ANALYSIS
 EVALUATION FACTOR #10 - CONDUCTING WORKSHOPS/MAKING
 PRESENTATIONS AT COUNTY, STATE OR NATIONAL MEETINGS
 ANALYZED BY HIGHEST DEGREE EARNED

Highest Degree	Strongly Agree	Agree	Disagree	Strongly Disagree	Total
Bachelor's	24 8.9%	84 31.1%	94 34.8%	68 25.2%	270 41.9%
Master's	18 25.0%	31 43.1%	17 23.6%	6 8.3%	72 11.2%
Doctorate	43 14.2%	98 32.5%	101 33.4%	60 19.9%	302 46.9%

n = 644

df = 6

p = 0.0004

 $\chi^2 = 24.37757$

Findings - Hypothesis 8

Hypothesis 8 stated: There will be no significant differences ($p > .05$) in the perceptions of merit pay evaluation factors and merit pay implementation factors

among FTP-NEA members who are elementary teachers, secondary teachers, college professors, elementary support persons, and secondary support persons. Table 48 illustrates the frequency and percentage of respondents within each category which were considered in the data analysis.

TABLE 48

FREQUENCY OF RESPONDENTS BY ASSIGNMENT
ORIGINAL DATA ANALYSIS

Assignment	Frequency ^a	Percent
Elementary Support	28	4.3%
Elementary	297	45.5%
Secondary Support	6	0.9%
Secondary	199	30.5%
College	69	10.6%
Other	54	8.3%

^a 9 respondents, or 1.4% of the total sample, did not give background information on assignment and were not included in the data analysis.

When the original Chi-square test was performed, there were no evaluation factors or implementation factors which produced valid test results. The groups were combined to produce three groups for a second analysis. "Elementary" and "elementary support" became the "elementary" group. "Secondary" and "secondary support" became "secondary." The "college" group remained the same and the "other" category was eliminated. The subsequent percentages of respondents are shown in Table 49.

TABLE 49

FREQUENCY OF RESPONDENTS BY ASSIGNMENT
SECOND DATA ANALYSIS

Assignment	Frequency ^a	Percent
Elementary	325	54.3%
Secondary	205	34.2%
College	69	11.5%

^a 63 respondents, or 9.5% of the total sample, did not give background information on assignment which was appropriate for the reanalysis categories and were not included in this data analysis.

When the second Chi-square test was completed, there were eight evaluation factors (#2, 3, 7, 9, 10, 11, 12, and 15) with valid, significant results at the .05 level of significance. There were no implementation factors with valid, significant results after the second analysis.

Using a "master's degree" (evaluation factor #2) as an evaluation factor for merit pay purposes was disagreed or strongly disagreed upon by 64.5% of the respondents. However, only 23.8% of college respondents disagreed (see Table 50).

TABLE 50

CHI-SQUARE TEST RESULTS - SECOND DATA ANALYSIS
EVALUATION FACTOR #2 - MASTER'S DEGREE
ANALYZED BY ASSIGNMENT

Assignment	Strongly		Strongly		Total
	Agree	Agree	Disagree	Disagree	
Elementary	41	58	75	148	322
	12.7%	18.0%	23.3%	46.0%	54.6%
Secondary	21	41	68	75	205
	10.2%	20.0%	33.2%	36.6%	34.7%
College	18	30	10	5	63
	28.6%	47.6%	15.9%	7.9%	10.7%

n = 590

df = 6

p = 0.0000

 $\chi^2 = 61.44483$

There were similar results for evaluation factor #3 (additional advanced degrees). Only 29.7% of college respondents disagreed or strongly disagreed, with 71.1% of the respondents in this total data analysis opposed to using this factor for merit pay purposes (see Table 51).

TABLE 51

CHI-SQUARE TEST RESULTS - SECOND DATA ANALYSIS
EVALUATION FACTOR #3 - ADDITIONAL ADVANCED DEGREES
ANALYZED BY ASSIGNMENT

Assignment	Strongly		Strongly		Total
	Agree	Agree	Disagree	Disagree	
Elementary	18	51	90	159	318
	5.7%	16.0%	28.3%	50.0%	54.4%
Secondary	15	37	64	87	202
	7.4%	18.2%	31.5%	42.9%	34.7%
College	24	21	16	3	64
	37.5%	32.8%	25.0%	4.7%	10.9%

n = 585

df = 6

p = 0.0000

 $\chi^2 = 91.83171$

There was a significant difference among groups on evaluation factor #7 (inservice participation/points earned). College respondents felt most strongly and secondary members least strongly that this factor should be used in determining merit pay recipients (see Table 52).

TABLE 52

CHI-SQUARE TEST RESULTS - SECOND DATA ANALYSIS
EVALUATION FACTOR #7 - INSERVICE PARTICIPATION/
POINTS EARNED
ANALYZED BY ASSIGNMENT

Assignment	Strongly		Strongly		Total
	Agree	Agree	Disagree	Disagree	
Elementary	43	150	69	60	322
	13.4%	46.6%	21.4%	18.6%	55.0%
Secondary	28	70	56	50	204
	13.7%	34.3%	27.5%	24.5%	34.9%
College	6	33	13	7	59
	10.2%	55.9%	22.0%	11.9%	10.1%

n = 585

df = 6

p = 0.0349

 $\chi^2 = 13.56331$

The results of this factor were similar to the previous one. The "college" group agreed and strongly agreed more often with the use of "professional involvement/committee representation" (evaluation factor #9) as a merit pay evaluation factor (see Table 53).

TABLE 53

CHI-SQUARE TEST RESULTS - SECOND DATA ANALYSIS
EVALUATION FACTOR #9 - PROFESSIONAL INVOLVEMENT/
COMMITTEE REPRESENTATION
ANALYZED BY ASSIGNMENT

Assignment	Strongly		Strongly		Total
	Agree	Agree	Disagree	Disagree	
Elementary	49	136	85	53	323
	15.2%	42.1%	26.3%	16.4%	54.7%
Secondary	33	100	44	27	204
	16.2%	49.0%	21.6%	13.2%	34.5%
College	16	36	7	5	64
	25.0%	56.2%	10.9%	7.8%	10.8%

n = 591

df = 6

p = 0.0213

$$\chi^2 = 14.87406$$

College respondents answered positively almost twice as often as either the "elementary" or "secondary" groups for use of evaluation factor #10 (conducting workshops/making presentations) (see Table 54).

TABLE 54

CHI-SQUARE TEST RESULTS - SECOND DATA ANALYSIS
EVALUATION FACTOR #10 - CONDUCTING WORKSHOPS/MAKING
PRESENTATIONS AT COUNTY, STATE OR NATIONAL MEETINGS
ANALYZED BY ASSIGNMENT

Assignment	Strongly		Strongly		Total
	Agree	Agree	Disagree	Disagree	
Elementary	31	98	116	79	324
	9.6%	30.2%	35.8%	24.4%	54.6%
Secondary	23	65	68	48	204
	11.3%	31.9%	33.3%	23.5%	34.4%
College	23	29	10	3	65
	35.4%	44.6%	15.4%	4.6%	11.0%

n = 593

df = 6

p = 0.0000

$$\chi^2 = 48.91861$$

There was a significant difference among groups on evaluation factor #11 (job-related extra-curricular activities). College respondents agreed or strongly agreed with the use of this factor more often than the other two groups (see Table 55).

TABLE 55

CHI-SQUARE TEST RESULTS - SECOND DATA ANALYSIS
 EVALUATION FACTOR #11 - JOB-RELATED EXTRA-CURRICULAR DUTIES
 ANALYZED BY ASSIGNMENT

Assignment	Strongly		Strongly		Total
	Agree	Agree	Disagree	Disagree	
Elementary	46	122	93	63	324
	14.2%	37.7%	28.7%	19.4%	54.7%
Secondary	33	80	49	42	204
	16.2%	39.2%	24.0%	20.6%	34.5%
College	22	26	10	6	64
	34.4%	40.6%	15.6%	9.4%	10.8%

n = 592

df = 6

p = 0.0023

$$\chi^2 = 20.40227$$

Evaluation factor #12 was "number of different preparations/grade levels." Fewer elementary respondents agreed or strongly agreed with the use of this factor in determining merit pay recipients (see Table 56).

TABLE 56

CHI-SQUARE TEST RESULTS - SECOND DATA ANALYSIS
EVALUATION FACTOR #12 - NUMBER OF DIFFERENT PREPARATIONS/
GRADE LEVELS
ANALYZED BY ASSIGNMENT

Assignment	Strongly		Strongly		Total
	Agree	Agree	Disagree	Disagree	
Elementary	35	87	124	71	317
	11.0%	27.4%	39.1%	22.4%	54.5%
Secondary	36	71	56	38	201
	17.9%	35.3%	27.9%	18.9%	34.5%
College	14	30	14	6	64
	21.9%	46.9%	21.9%	9.4%	11.0%

n = 582

df = 6

p= 0.0002

 $\chi^2 = 25.85882$

Of all respondents, 72.9% agreed or strongly agreed that administrator observations/evaluations (evaluation factor #15) should be used for merit pay purposes.

However, a lower percentage of college respondents felt that this factor should be considered (see Table 57).

TABLE 57

CHI-SQUARE TEST ANALYSIS- SECOND DATA ANALYSIS
EVALUATION FACTOR #15 - ADMINISTRATOR OBSERVATIONS/
EVALUATIONS
ANALYZED BY ASSIGNMENT

Assignment	Strongly		Strongly		Total
	Agree	Agree	Disagree	Disagree	
Elementary	68	178	43	32	321
	21.2%	55.5%	13.4%	10.0%	54.4%
Secondary	28	117	37	21	203
	13.8%	57.6%	18.2%	10.3%	34.4%
College	7	32	17	10	66
	10.6%	48.5%	25.8%	15.2%	11.2%

n = 590

df = 6

p = 0.0327

$\chi^2 = 13.73997$

Findings - Hypothesis 9

Hypothesis 9 stated: There will be no significant differences ($p > .05$) in the perceptions of merit pay evaluation factors and merit pay implementation factors among FTP-NEA members who are secondary language arts, mathematics, science, social studies, fine arts, vocational teachers, guidance counselors, and media specialists. Table 58 illustrates the frequency and percentage of respondents within each category which were considered in the data analysis.

TABLE 58

FREQUENCY OF RESPONDENTS BY SECONDARY ASSIGNMENT
ORIGINAL DATA ANALYSIS

Secondary Assignment	Frequency ^a	Percent
Media Specialist	9	4.0%
Combined Area	18	8.1%
Fine Arts	6	2.7%
Guidance Counselor	10	4.5%
Social Studies	33	14.8%
Language Arts	30	13.5%
Mathematics	31	13.9%
Other	45	20.2%
Science	19	8.5%
Vocational	22	9.9%

^a 439 respondents, or 66.3% of the total sample, did not have a secondary assignment and were not included in the data analysis.

A "combined area" group was used for those respondents who gave more than one assigned area in their background information. "Other" referred to those with assignments not considered in this list.

The Chi-square test was administered with no valid test results for evaluation or implementation factors. Areas were combined to form two larger groups. Social studies, language arts, mathematics, science, and the combined area became a new "academic" group. Fine arts, guidance, media, other, and vocational became a new "other" category (see Table 59).

TABLE 59

FREQUENCY OF RESPONDENTS BY SECONDARY ASSIGNMENT
SECOND DATA ANALYSIS

Secondary Assignment	Frequency ^a	Percent
Academic	131	58.8%
Other	92	41.3%

^a 439 respondents, or 66.3% of the total sample, did not have a secondary assignment and were not included in the data analysis.

The original groups were combined, and a Chi-square test was administered. However, there continued to be no valid, significant test results.

CHAPTER V

SUMMARY, CONCLUSIONS, AND RECOMMENDATIONS

A summary of the findings of each hypothesis are given. The conclusions drawn from those findings are then presented, using each hypothesis as a frame of reference.

Conclusions were also made based on the individual questionnaire items. This information is presented in appendices 23 and 24, where the actual evaluation and implementation factors are examined.

Recommendations are made for merit pay, both evaluation and implementation factors. The total percentage of "agree" and "strongly agree" responses is given following each recommendation. A ranking of these percentages for each set of factors aided in making recommendations (see appendices 26 and 27). Recommendations for further study conclude the chapter.

Summary - Hypothesis 1

Hypothesis 1 stated: There will be no significant differences ($p > .05$) in the perceptions of merit pay

evaluation factors and merit pay implementation factors among FTP-NEA members from small, middle-sized, and large districts. The opinions of FTP-NEA members from small, middle-sized, and large districts varied significantly ($p < .05$) on one merit pay evaluation factor: (13) Number of days absent. The null hypothesis was accepted for the evaluation factors which produced valid, but insignificant results.

Evaluation factor #13 referred to using "number of days absent" as one criterion for rewarding teachers. Teachers from small and middle-sized districts appeared to be more in favor of this factor than their counterparts in large districts (see Table 5).

There were three implementation factors which resulted in responses of significant differences ($p < .05$) among FTP-NEA members when small, middle-sized, and large districts were regrouped to form the "large" and the "other" groups: (2) There should be some limit or quota on the number of teachers who may receive rewards; (4) The program should include all classroom teachers, counselors, media specialists, and resource teachers; and (19) Funds should be made available for the training of evaluators. The null hypothesis was accepted for the implementation factors which produced valid but insignificant test results.

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Evaluation factor #13 referred to using "number of days absent" as one criterion for rewarding teachers. Teachers from small and middle-sized districts appeared to be more in favor of this factor than their counterparts in large districts (see Table 5).

There were three implementation factors which resulted in responses of significant differences ($p < .05$) among FTP-NEA members when small, middle-sized, and large districts were regrouped to form the "large" and the "other" groups: (2) There should be some limit or quota on the number of teachers who may receive rewards; (4) The program should include all classroom teachers, counselors, media specialists, and resource teachers; and (19) Funds should be made available for the training of evaluators. The null hypothesis was accepted for the implementation factors which produced valid but insignificant test results.

Those respondents in large districts were more strongly against the idea of a quota (implementation factor #2) than those in middle-sized and small districts (see Table 7). The respondents from large districts agreed more strongly than those from the "other" group (middle-sized and small districts) that the program should include all classroom teachers, counselors, media specialists, and resource teachers (implementation factor #4) (see Table 8). There was also stronger agreement among members from large districts on implementation factor #19 (Funds should be made available for the training of evaluators) than among members from small and middle-sized districts (see Table 9).

Summary - Hypothesis 2

Hypothesis 2 stated: There will be no significant differences ($p > .05$) in the perceptions of merit pay evaluation factors and merit pay implementation factors among state FTP-NEA board members, local FTP-NEA affiliate board members, and local FTP-NEA affiliate building representatives.

There were no valid, significant test results using the original categories. The original subgroups were combined to form two new groups, the "Building Representative" group and the "Board Member" group.

The Chi-square tests which had originally produced invalid results were reanalyzed using the new groups. "Board Members" and "Building Representatives" varied significantly ($p < .05$) on two merit pay evaluation factors: (3) Additional advanced degrees, and (15) Administrator observations/evaluations. The null hypothesis was accepted for the evaluation factors which produced valid but insignificant results.

A higher percentage of responses from the "Board Members" than the "Building Representatives" indicated that "additional advanced degrees" (evaluation factor #3) should be used as an evaluation factor in a merit pay plan (see Table 12). When evaluation factor #15 (administrator observations/evaluations) was considered, the "Building Representatives" group's opinions were more in favor of the factor than the opinions of "Board Members" (see Table 13).

After regrouping, there was only one implementation factor which resulted in responses of significant differences ($p < .05$) between the two groups: (21) A committee of evaluators should be primarily from within the teacher's district. Building representatives felt more strongly than board members that a local committee should be used for evaluation purposes (see Table 14). The null hypothesis was accepted for the other implementation factors which gave valid, insignificant test results.

Summary - Hypothesis 3

Hypothesis 3 stated: There will be no significant differences ($p > .05$) in the perceptions of merit pay evaluation factors and merit pay implementation factors between male and female FTP-NEA members.

Male and female respondents felt significantly different ($p < .05$) on five evaluation factors: (2) Master's degree, (3) Additional advanced degrees, (6) Standardized teacher test scores, (13) Number of days absent, and (15) Administrator's observations/evaluations. The null hypothesis was not rejected for the evaluation factors resulting in valid, insignificant tests.

Males felt more strongly than females that a master's degree (evaluation factor #2) should be used to determine merit pay recipients. They also felt more strongly that additional advanced degrees (evaluation factor #3) should be considered (see tables 16 and 17).

Females disagreed more strongly than males that standardized teacher test scores should be used for evaluation purposes (evaluation factor #6) (see Table 18). They also felt more strongly that number of days absent (evaluation factor #13) and administrator observations/evaluations (evaluation factor #15) should be used in determining merit pay recipients (see tables 19 and 20).

There were five implementation factors which resulted in significant differences ($p < .05$) between male and female respondents: (3) The program should be voluntary, and every teacher should be eligible; (7) Teachers in shortage areas (such as math and science) should be paid more; (8) Teachers in alternative schools/programs should be paid more; (11) Programs for rewarding teachers should be developed at the district level; and (24) All records of evaluations should be confidential. The null hypothesis was accepted for the implementation factors which gave valid and insignificant test results.

Females agreed more strongly than males that the program should be voluntary, and every teacher should be eligible (implementation factor #3) (see Table 21). They also felt more strongly about implementation factor #11 (local development of the program) and implementation factor #24 (the confidentiality of records) (see tables 24 and 25).

Females were more strongly against paying extra money to teachers in shortage areas (implementation factor #7) than males were (see Table 22). Similarly, they were also more strongly against paying teachers in alternative schools/programs more money (implementation factor #8) (see Table 23).

Summary - Hypothesis 4

Hypothesis 4 stated: There will be no significant differences ($p > .05$) in the perceptions of merit pay evaluation factors and merit pay implementation factors between black and white FTP-NEA members.

There was one evaluation factor which produced significant differences ($p < .05$) between black and white respondents: (10) Conducting workshops/making presentations at county, state or national meetings. Whites felt more strongly than blacks that this factor should be used for evaluation purposes in a merit pay plan (see Table 27). The null hypothesis was accepted for all evaluation and implementation factors producing valid, insignificant Chi-square test results.

Summary - Hypothesis 5

Hypothesis 5 stated: There will be no significant differences ($p > .05$) in the perceptions of merit pay evaluation factors and merit pay implementation factors among FTP-NEA members of different ages.

The opinions of FTP-NEA members in various age groups varied significantly ($p < .05$) on four evaluation factors: (1) Teaching experience/number of years teaching; (2) Master's degree; (5) Use of standardized student test scores, by school; and (11) Job-related extra-curricular duties. The null hypothesis was accepted for the

evaluation factors which gave valid but insignificant results.

Senior teachers responded more frequently that they felt years of experience (evaluation factor #1) should be used as an evaluation factor (see Table 29). They also felt more strongly than younger teachers that a master's degree (evaluation factor #2) should be considered (see Table 30).

Evaluation factor #11 (job-related extra-curricular duties) revealed a significant difference among groups (see Table 31). Those respondents in the "31 to 40 years old" group showed a preference for this factor.

The subgroups were combined to form the "20 to 40 years old" group and the "over 40 years old" group. Those respondents in the "over 40 years old" group disagreed more strongly on the use of standardized student test scores, by school (evaluation factor #5) (see Table 35).

There were four implementation factors whose Chi-square test results produced significant differences ($p < .05$) among age groups: (1) All teachers should receive more money before any teacher is rewarded; (5) Teachers who receive extra pay should not be expected to take on extra duties; (11) Programs for rewarding teachers should be developed at the district level; and (20) There should be a committee of evaluators, rather than one administrator.

Respondents in the "20 to 30 years old" group and the "41 to 50 years old" group felt more strongly than the others that extra duties should not be required of merit pay recipients (implementation factor #5) (see Table 32). For implementation factor #11 (Programs for rewarding teachers should be developed at the district level), the respondents from 41 to 50 years old agreed or strongly agreed more than the other three groups (see Table 33).

When the groups were combined, those in the "over 40 years old" group felt more strongly that all teachers should receive more money before any teacher is rewarded (implementation factor #1) (see Table 36). This same group also responded more strongly that there should be a committee of evaluators, rather than one administrator (implementation factor #20) (see Table 37).

Summary - Hypothesis 6

Hypothesis 6 stated: There will be no significant differences ($p > .05$) in the perceptions of merit pay evaluation factors and merit pay implementation factors among FTP-NEA members with various years of teaching experience.

The opinions of respondents in this study varied significantly ($p < .05$) on two evaluation factors, based on years of experience: (1) Teaching experience/number of years teaching, and (7) Inservice participation/points

earned. The null hypothesis was accepted for the factors with valid and insignificant Chi-square test results.

"Teaching experience" (evaluation factor #1) was more important to those respondents with more years of experience (see Table 39). Those respondents with 11 to 15 years of experience felt least strongly, and those with over 15 years of experience felt most strongly, that inservice participation/points earned (evaluation factor #7) should be considered as an evaluation factor in a merit pay plan (see Table 40).

One implementation factor had results showing significant differences among the subgroups of "years of experience": (5) Teachers who receive extra pay should not be expected to take on extra duties. The null hypothesis was accepted for the implementation factors which produced valid and insignificant tests. Respondents with 0 to 10 years of experience felt more strongly than those with more than 10 years of experience that teachers should not be expected to take on extra duties (implementation factor #5) (see Table 41).

Summary - Hypothesis 7

Hypothesis 7 stated: There will be no significant differences ($p > .05$) in the perceptions of merit pay evaluation factors and merit pay implementation factors among FTP-NEA members whose highest college degree is an

associate degree, a bachelor's degree, a master's degree, a specialist degree, and a doctorate degree, or no college education.

There were no valid, significant Chi-square test results for evaluation factors or implementation factors using the original groups of respondents. When the categories were combined to form the "bachelor's," "master's," and "doctorate" groups, there were three evaluation factors whose results showed significant differences in opinions among respondents based on the highest degree earned: (2) Master's degree, (3) Additional advanced degrees, and (10) Conducting workshops/making presentations at county, state or national meetings. The null hypothesis was accepted for those evaluation and implementation factors producing valid, but insignificant test results.

Those FTP-NEA members in the "bachelor's" group responded negatively far more frequently than those in the "doctorate" group to the use of both "master's degree" and "additional advanced degrees" (evaluation factors #2 and 3) for merit pay purposes (see tables 45 and 46).

The "doctorate" group also felt more strongly about evaluation factor #10. They were in favor of using "conducting workshops/making presentations" for determining merit pay recipients (see Table 47).

Summary - Hypothesis 8

Hypothesis 8 stated: There will be no significant differences ($p > .05$) in the perceptions of merit pay evaluation factors and merit pay implementation factors among FTP-NEA members who are elementary teachers, secondary teachers, college professors, elementary support persons, and secondary support persons.

There were no Chi-square test results which were valid and significant when the original subgroups were utilized. The collapsed table included "elementary," "secondary," and "college" categories.

Elementary, secondary and college respondents varied significantly ($p < .05$) in their responses on eight evaluation factors: (2) Master's degree; (3) Additional advanced degrees; (7) Inservice participation/committee representation; (10) Conducting workshops/making presentations at county, state or national meetings; (11) Job-related extra-curricular activities; (12) Number of different preparations/grade levels; and (15) Administrator observations/evaluations. The null hypothesis was accepted for the evaluation factors with valid, insignificant test results.

There were no implementation factors whose Chi-square tests produced valid, significant results. The null hypothesis was accepted for those items whose tests were valid but insignificant.

Those respondents in the "college" group disagreed least frequently on using a "master's degree" (evaluation factor #2) as a merit pay factor (see Table 50). They felt the same for "additional advanced degrees" (evaluation factor #3) as merit pay factors (see Table 51).

College respondents felt most strongly and secondary respondents felt least strongly in favor of using "inservice participation/points earned" (evaluation factor #7) to determine merit pay recipients (see Table 52). "Professional involvement/committee representation" (evaluation factor #9) was also more important to college respondents than those members in the other two groups (see Table 53).

College respondents felt more strongly than the others that the use of evaluation factor #10 (conducting workshops/making presentations at county, state or national meetings) is important in a merit pay program (see Table 54). Similar results were obtained for evaluation factor #11 (job-related extra-curricular duties) with college respondents agreeing or strongly agreeing more frequently than the others (see Table 55).

Of the three groups, elementary teachers felt least strongly about the use of "number of different preparations/grade levels" (evaluation factor #12) for merit pay purposes (see Table 56). The respondents in the "secondary" and "elementary" groups felt more strongly than

those in the "college" group that "administrator observation/evaluation" (evaluation factor #15) should be considered in merit pay evaluation (see Table 57).

Summary - Hypothesis 9

Hypothesis 9 stated: There will be no significant differences ($p > .05$) in the perceptions of merit pay evaluation factors and merit pay implementation factors among FTP-NEA members who are secondary language arts, mathematics, science, social studies, fine arts, vocational teachers, guidance counselors, and media specialists.

There were no valid test results which showed significant differences among the opinions of respondents within these groups, even after the subgroups were combined to form the "academic" and "other" groups. For all evaluation and implementation factors that indicated valid, but insignificant results, the null hypothesis was accepted.

Conclusions - Hypothesis 1

Hypothesis 1 referred to the size of the district. Teachers from large districts felt least favorable about using "number of days absent" (evaluation factor #13) in a merit pay plan. Perhaps respondents in large districts have more opportunities for staff development or attendance

at meetings, and do not want to be penalized for leaving their classroom on those days.

Respondents from large districts also seemed more concerned with including as many teachers as possible in a merit pay program. They were more strongly against the use of a quota (implementation factor #2), and more in favor of including all classroom teachers, counselors, media specialists, and resource teachers (implementation factor #4).

Implementation factor #19 (Funds should be made available for the training of evaluators) brought stronger agreement from respondents in large districts. Those respondents in large districts might have had more opportunities for training, and value the availability of funding for such purposes.

Conclusions - Hypothesis 2

Respondents in the "Board Members" group felt more strongly than those in the "Building Representatives" group that "additional advanced degrees" should be used as an evaluation factor. More of the FTP-NEA members who have advanced to the position of board member may have earned these advanced degrees and therefore see the merit in their use as an evaluation criterion. It is interesting to note, however, that there were no similar significant differences in perceptions on the "master's degree" factor (#2).

Building representatives felt more strongly that a local committee should be used for evaluation purposes (implementation factor #21). Serving as a board member may give individuals a more global picture of evaluation, and the merit in using evaluators from outside a district.

Conclusions - Hypothesis 3

Males felt more strongly than females that a "master's degree" (evaluation factor #2) and "additional advanced degrees" (evaluation factor #3) should be used as evaluation criteria. Perhaps in the past, males have had more of an opportunity to pursue advanced degrees, and value the work that is involved; or women may look more "humanitarilly" at teaching, and realize the value of instincts and experiences that cannot be gained through academic work. Similarly, they disagreed with the use of "standardized teacher test scores" (evaluation factor #6), which supports the notion presented earlier about formal academic achievement.

It is interesting to note that females felt more strongly in favor of using number of days absent (evaluation factor #13), despite the consideration of staying home with sick children. And they were also more in favor of the traditional "administrator observation/evaluation" (evaluation factor #15).

Females seemed to feel strongly about implementation factors which might be considered "personally" important: every teacher should be eligible (implementation factor #3), local development of a plan (implementation factor #11), and confidentiality of records (implementation factor #24). They also disagreed more strongly with rewarding teachers in shortage areas (implementation factor #7) and alternative schools/programs (implementation factor #8). Perhaps females are not often employed in such positions, and hence disagree with rewarding such teachers.

Conclusions - Hypothesis 4

The only item which produced significant differences between the perceptions of black and white respondents was evaluation factor #10 (conducting workshops/making presentations at county, state or national meetings). Blacks were less in favor of using this factor than whites. Perhaps they do not value the information gained at these workshops, or have not had as much opportunity to conduct such sessions.

Conclusions - Hypothesis 5

Four evaluation and four implementation factors had Chi-square test results which produced significant differences in the perceptions of respondents among various age groups. Senior teachers may place more value on

traditional methods of evaluation, hence their strong approval of "years of experience" (evaluation factor #1) and use of a "master's degree" (evaluation factor #2).

The "over 40 years old" group may want to be judged on their own merits rather than those of others in their school. This may have led to their stronger disapproval of evaluation factor #5 (standardized student test scores, by school).

Those respondents within the "31 to 40 years old" group felt more strongly that "job-related extra-curricular duties" (evaluation factor #11) should be used for evaluation purposes. Teachers from 20 to 30 years old may be "breaking into" the profession, and not have the time for other duties, while those over 40 years old may have discontinued performing such duties. In either case, those two groups would place less value on this factor. Similarly, those in the "20 to 30 years old" and the "41 to 50 years old" groups felt more strongly that extra duties should not be required. They might not be in a personal situation which permits the extra time required.

Those respondents in the "41 to 50 years old" group felt more strongly about local development of a merit pay program. Perhaps their experience has caused them to feel more of a trust in local control.

As might have been expected, those teachers in the "over 40 years old" group felt more strongly that all

teachers should receive more money. They may have worked within the profession long enough to care about the rewards of all teachers as opposed to a few individuals. They also favored a committee of evaluators, perhaps having grown skeptical over time with the evaluations of a single administrator.

Conclusions - Hypothesis 6

Examining responses within the category of "years of experience" revealed two evaluation and one implementation factor with significant differences in perceptions among groups. As might have been expected, those respondents with more years of experience preferred "teaching experience/years of teaching" (evaluation factor #1). This is one criterion they would automatically meet.

There is a question on the reason for the results of evaluation factor #7 (inservice participation/points earned). Those respondents with 11 to 15 years of experience felt least strongly, while those with over 15 years felt most strongly about this factor. Perhaps those teachers in this first group think they "know it all," while those in the second group have come to realize they do not!

The results for implementation factor #5 (taking on extra duties) were similar to that discussed when age groups were compared. Those respondents with less than 11

years of experience felt more strongly against the question of "extra duties," perhaps because the requirement for extra duties has been alleviated with the relatively recent influence of teacher unions and collective bargaining.

Conclusions - Hypothesis 7

Using the categories of "bachelor's degree," "master's degree," and "doctorate degree" respondents, there were three evaluation factors which differed among the groups. It seems logical that those in the "doctorate" group would respond more favorably than the "bachelor's" group to the use of "master's degree" (evaluation factor #2) and "additional advanced degrees" (evaluation factor #3). Because college professors are often called upon to conduct workshops or make presentations (evaluation factor #10), it follows that they should feel more strongly about this factor.

Conclusions - Hypothesis 8

The category of "assignment" produced the greatest number of significant differences in perceptions of evaluation factors (eight). There were no implementation factors which produced significant Chi-square test results.

College respondents agreed more frequently with the use of "master's degree" (evaluation factor #2) and "additional advanced degrees" (evaluation factor #3), as

might have been expected. Personnel employed at the college level are often called upon for "professional involvement/committee representation" (evaluation factor #9), "conducting workshops/making presentations" (evaluation factor #10), and "job-related extra-curricular duties" (evaluation factor #11), so it follows that they would feel more strongly about these factors.

College respondents answered more favorably to "inservice participation/points earned" (evaluation factor #7), perhaps because they are often asked to provide these services. Those respondents in the "secondary" category were least in favor of this factor, which might reflect their emphasis on content rather than methods.

Elementary teachers may have believed their situations would not be considered when they responded unfavorably to evaluation factor #12 (number of different preparations/grade levels). The use of "administrator observations/evaluations" (evaluation factor #15) is not used as predominantly in college as it is in public school situations, hence the unfavorable response of the "college" group on this factor.

Conclusions - Hypothesis 9

There were no evaluation or implementation factors which revealed significant differences among the opinions of respondents when secondary assignments were considered.

Apparently, the teaching assignment of secondary respondents did not affect their perceptions of merit pay evaluation or implementation factors.

Recommendations for Merit Pay - Evaluation Factors

In order to make recommendations based on the results of this study, the opinions of the total sample were examined. Appendix 18 presents the percentages of "strongly agree," "agree," "disagree," and "strongly disagree" responses for each evaluation factor. The sum of the "strongly agree" and "agree" columns was computed (see Appendix 26). These totals were utilized in formulating recommendations for evaluation factors that should or should not be considered by persons in a position to influence the development of merit plans for teachers. The percentage given in parentheses for each factor discussed here is the total of the "strongly agree" and "agree" percentages.

When a merit pay program is considered, "teaching experience/number of years teaching" (79.2%) and "Administrator observations/evaluations" (74.1%) should both be included as evaluation criteria. It is interesting to note that these are the two primary criteria used with the single salary schedule for compensating and retaining teachers.

There were four other evaluation factors which were considered important by more than 50% of the respondents, although the totals were not as high as those for the previous two factors. It is recommended that "Peer observations/evaluations" (64.5%), "Inservice participation/points earned" (57.6%), "Job-related extra-curricular duties" (56.0%), and "Professional involvement/committee representation" (52.8%) be considered, but not as major evaluation factors in a merit pay plan.

The remainder of the evaluation factors received favorable responses from less than 50% of the FTP-NEA members sampled. It is recommended that the following not be used as criteria in rewarding teachers: "Number of different preparations/grade levels" (47.0%); "Conducting workshops/making presentations at county, state or national meetings" (46.3%); "Additional areas of certification" (43.0%); "Number of days absent" (38.3%); "Master's degree" (35.9%); "Additional advanced degrees" (29.1%); "Standardized teacher test scores" (19.6%); "Standardized student test scores, by school" (14.0%); and "Standardized student test scores, by teacher" (13.5%).

Recommendations for Merit Pay - Implementation Factors

The opinions of the total sample were examined in order to make recommendations based on the results of this

study. The percentages of "strongly agree," "agree," "disagree," and "strongly disagree" responses for each implementation factor are presented in Appendix 19. Appendix 27 gives the sum of the "strongly agree" and "agree" columns. Recommendations for implementing a merit pay plan for teachers have been determined by examining these totals. After each factor is presented, this total of "strongly agree" and "agree" responses is given in parentheses.

Twenty of the 25 implementation factors were agreed or strongly agreed upon by over 2/3 of the respondents in this study (>68%). The following list of recommendations is based on these percentages:

1. Each teacher should have access to his/her own records. (98.9%)
2. An evaluation instrument should stress performance on the job in the assigned area. (97.7%)
3. The state should provide the funds for rewarding teachers without cutting back on general funds. (96.9%)
4. Teachers should be involved in planning the system of rewarding teachers. (96.9%)
5. Adequate planning time (at least one year) should be evident before a plan is implemented. (96.6%)

6. Those who perform the evaluations should receive special training. (94.9%)
7. Teachers should be involved in evaluating and revising a system of rewarding teachers. (94.8%)
8. Teachers should be involved in implementing a system of rewarding teachers. (94.4%)
9. There should be an appeals process available to teachers. (93.7%)
10. A committee of evaluators should be primarily from the teacher's teaching field/subject area. (93.4%)
11. All records of evaluation should be confidential (93.4%)
12. Teachers should not be removed from the classroom as part of the program. (93.2%)
13. All teachers should receive more money before any teacher is rewarded. (93.0%)
14. There should be a committee of evaluators, rather than one administrator. (92.3%)
15. The program should be voluntary, and every teacher should be eligible to apply. (91.2%)
16. Funds should be made available for the training of evaluators. (90.2%)
17. The program should include all classroom teachers, counselors, media specialists and resource teachers. (88.8%)

18. Teachers who receive extra pay should not be expected to take on extra duties. (76.8%)
19. A committee of evaluators should be primarily from within the teacher's district. (75.7%)
20. Programs for rewarding teachers should be developed at the district level. (69.2%)

The remaining five implementation factors were approved by less than one-fourth of the respondents. It is recommended that neither business persons (24.9%) nor legislators (23.9%) should be involved in planning a system of rewarding teachers. Teachers in alternative schools/programs (24.4%) and those in shortage areas (such as math and science) (24.2%) should not be paid more. And respondents felt most strongly that there should not be a limit or quota on the number of teachers who may receive rewards (15.1%).

Recommendations for Further Study

1. The study should be replicated in Florida and the differences in opinions since the implementation of merit pay should be examined.
2. The study should be repeated in other states which have National Education Association affiliates. Comparisons should be made of the responses in states which have

implemented state-wide merit pay and those which have not implemented a plan.

3. A study should be conducted of the opinions of instructional personnel only, with the perceptions of support personnel eliminated from the study.
4. Responses should be solicited from FTP-NEA members who are not in leadership positions.
5. A study should be conducted to compare the responses of FTP-NEA members and those of members of the Florida Education Association (an American Federation of Teachers affiliate).
6. A study should be conducted to compare responses of FTP-NEA members and non-union teachers.

APPENDICES

APPENDIX 1

BACKGROUND ON INDIVIDUAL EVALUATION FACTORS

A review of the salient literature was analyzed to determine which evaluation factors would be incorporated into the initial survey instrument. The "panel of experts" reviewed the instrument and the suggested revisions were incorporated into the final version. Included here are major findings related to the evaluation factors which were included in the final instrument.

Evaluation Factor #1

Teaching experience/number of years teaching

At the present time, the majority of teacher pay plans utilize only seniority and college degrees to determine a teacher's level, and therefore, the financial compensation received. This system, called the single salary schedule, has been promoted by teacher organizations, including the National Education Association, as the most equitable method of compensating teachers for their work. It is assumed that as a teacher gains more experience, he/she becomes a better teacher and should be rewarded as such. According to Lipsky and Bacharach (1983, p. 3), it is necessary to show a relationship between student performance and seniority. However, they found mixed support for this notion (1983, p. 4).

Rist (1983) discovered that only 17.6% of the teachers in his study favored considering only seniority and academic credits in merit pay programs (p. 249).

In a study on reduction in force (RIF) procedures, Phelan reported that opponents of strict seniority said "seniority leaves school staffs with a lot of deadwood" (1983, p. 45). Proponents of seniority, however, felt it to be the most equitable of possible factors in determining who is to be retained.

Evaluation Factor #2

Master's degree

Evaluation Factor #3

Additional advanced degrees

The use of advanced degrees for pay purposes is generally used with "years of experience" in the single salary schedule. Paramore (1984, p. 4) contended that extra pay provided for attainment of a master's degree is "designed to reimburse teachers for the time, effort and expenses incurred in attending school to keep up with advances in their fields, not to reward them for being 'better' teachers." She felt that "good teachers are not made in colleges" (p. 4). According to the Alabama Education Association, "Research uncovers an important positive relationship between student achievement test scores and teacher educational attainment" (1984, p. 6).

Lipsky and Bacharach reported on two contradictory studies. According to a 1966 report by Coleman, experience and educational attainment of teachers does not affect

student achievement (1983, p. 4). However, in 1975, Bidwell and Kasarda found that "a measure of the percentage of teachers with at least a Master's Degree have a significant and positive impact on achievement test scores" (1983, p. 4).

The merit pay program now being implemented in the state of Florida originally required teachers to hold an in-field master's degree, or 15 semester hours of in-field courses and an out-of-field master's degree (Bureau of National Affairs, Inc., 1984, p. 654). The Florida School Boards Association has opposed this in-field requirement (Task Force on Merit Pay, September, 1983, n. p.).

Evaluation Factor #4

Standardized Student Test Scores, by Teacher

Evaluation Factor #5

Standardized Student Test Scores, by School

It has been proposed that merit pay be awarded to teachers based on the outcome of their teaching, i.e., student test scores. Education has been compared to the business world, where employees' compensation often depends upon how much they produce. Rewards for student performance have been suggested for higher education also.

Voegel (1971) described a system of faculty commission pay based on student achievement. It is important to note that the whole faculty was involved in the preparation of

the plan, which included the use of performance contracts (p. 57).

The Florida School Boards Association's Task Force on Merit Pay stated that an "essential element of merit pay must be tied to student performance" (1983, n. p.). The executive director of the American Association of School Administrators, Paul Salmon, favored an incentive system tied to measurable outputs, such as student achievement (Tursman, 1983, p. 19).

Paramore (1984, p. 4) claimed that standardized test scores are "notoriously unreliable indicators of individual student achievement." In her opinion, what students learn cannot be measured by tests.

One concern of educators, including teacher unions, is that the quality and quantity of a student's learning are based upon many factors over which the teacher has no control. These factors make merit pay based on test scores an unreliable judge of a teacher's actual "merit." An Iowa study group came to this conclusion: "Student gain, as measured by standardized tests, may be used to evaluate teacher effectiveness only under extensive controls and adjustments to recognize and compensate for factors other than the teacher's influence" (Whitworth, 1970, p. 3).

In the Houston Second Mile Plan, test scores are predicted for each school. If the students at the school perform as well or better than predicted, all eligible

teachers at that school receive a bonus (Miller and Say, 1982, p. 25).

In Florida, the legislature reserved some of the merit pay funding for use in district-developed merit pay programs. If a district chose to participate, at least 50% of the money received had to be used for the top 25% of the schools for a "merit school" program. All teachers at a "meritorious" school were to receive a bonus, regardless of their involvement in the academic area where the "superior" performance was achieved. FTP-NEA affiliates in Florida encouraged their teachers not to accept, or be involved in the planning of a "merit school" program, and many districts rejected the proposal (Merit Pay Plan Rejected, 1984, p. 4).

Evaluation Factor #6

Standardized Teacher Test Scores

It has been suggested that teachers might qualify for merit pay based on their scores on a standardized content area test. In Florida, a qualifying score on a validated subject area test is one requirement for eligibility into the master teacher program (Associate Master Teacher Requirements Detailed, 1984, p. 1).

The National Education Association feels that testing is an acceptable method for screening people for entry into the profession, but is unacceptable for continuing in a

position, or rewarding a teacher (Futrell, 1985, p. 19). A statement by the Texas State Teachers Association reflects the feelings of its national organization (1984, p. 4).

Evaluation Factor #7

Inservice Participation/Points Earned

One viewpoint that is sometimes presented in educational circles is the importance of continuous upgrading of teaching skills. A common vehicle for this training is district inservice, or staff development, programs. In Florida, teachers earn points for inservice participation, which can then be used for recertification.

The Houston Second Mile Plan includes a stipend for inservice participation. Funds are also available for additonal courses which are in-field (Miller and Say, 1982, p. 25).

The Orange County (Florida) Classroom Teachers Association (OCCTA) is an affiliate of the Florida Teaching Profession - National Education Association. Its Merit Pay Task Force presented a position paper to the organization's representative council in January of 1984. The Incentive-based Professional Compensation Plan proposal included in-service participation as one criteria for receiving a reward. The reward was to be considered a permanent salary incentive (Orange County Classroom Teachers Association, 1984, p. 3).

Evaluation Factor #8

Additional Areas of Certification

It has been suggested that teachers with several areas of certification should be rewarded. This qualification might make a teacher more valuable to the system, since the teaching assignment could be more flexible. The Orange County Classroom Teachers Association recommended that additional certification be considered a permanent salary incentive (Orange County Classroom Teachers Association, 1984, p. 3).

Evaluation Factor #9

Professional Involvement/Committee Representation

Newton (1980, p. 50) described an outcomes-focused evaluation system which considered teaching and service as the two primary areas of evaluation. Within the service area, representation on regularly-meeting committees and various types of professional involvement are included as evaluation factors.

The Orange County Classroom Teachers Association also considered professional involvement to be a viable criterion in a merit pay plan. Active participation in professional organizations and local, state, and national education committees were annual incentives in their plan (Orange County Classroom Teachers Association, 1984, p. 3).

Evaluation Factor #10

Conducting Workshops/Making Presentations at
County, State or National Meetings

In the outcomes-focused evaluation system described by Newton (1980, p. 50), professional presentations to both the faculty and outside groups were considered in the service area of evaluation. The Orange County Classroom Teachers Association's plan included both in-service workshops and informational presentations as annual incentive areas (Orange County Classroom Teachers Association, 1984, p. 3).

Evaluation Factor #11

Job-related Extra-curricular Duties

It has been suggested that one criteria for earning merit pay be extra-curricular duties which are related to the job of teaching. In Newton's outcomes-focused evaluation system, a teacher was evaluated in areas that relate to their teaching, such as development of instructional materials and methods, and revisions of curriculum (1980, p. 50). Examples of job-related extra-curricular activities suggested in the Orange County Classroom Teachers Association plan were unsupplemented activities and team leaders in the junior high schools (Orange County Classroom Teachers Association, 1984, p. 3).

Evaluation Factor #14

Peer Observations/Evaluations

Peer supervision has frequently been discussed as one possibility for providing teachers with feedback and suggestions for improving their classroom performance. In Florida, each first year teacher is assigned a peer teacher to provide on-site suggestions for modifying teaching and planning procedures. Centra concluded from his studies that peer evaluation at the college level would not provide results reliable enough to be used in compensation decisions (1975, p. 327).

Evaluation Factor #15

Administrator's Observations/Evaluations

The administrator's observations/evaluations is now used frequently for teacher evaluation in public schools. Evaluation by the administrator is part of many merit pay plans in use now, or in the past (What is Merit Pay and What is it Supposed to Do?, 1983, p. 6).

APPENDIX 2

BACKGROUND ON INDIVIDUAL IMPLEMENTATION FACTORS

Extensive literature was analyzed to determine the procedures/processes which have been evident in the implementation phases of merit pay plans. The "panel of experts" reviewed the initial instrument and made suggestions, as with the evaluation factors. Major findings related to the final implementation factors are outlined here.

Implementation Factor #1

All teachers should receive more money
before any teacher is rewarded.

This implementation factor has probably been mentioned more often than any other in relation to merit pay programs. A 1983 Maryland study revealed that when the average teacher salary of \$20,000 was corrected for inflation, teachers had not received a real increase since 1970 (Newcombe, 1983, p. 13).

The American Association of School Administrators contended that a program should have entry-level salaries high enough to attract people from the top fourth of those with vocations requiring a bachelor's degree (Tursman, 1983, p. 24). The Educational Research Service declared that merit pay is no substitute for an adequate base salary scale for all good and competent teachers (Robinson, 1983, p. 18). And the United States House of Representative's

Task Force stated that "School districts and states must raise the basic pay of teachers" (Perkins, 1983, p. 6).

In school systems with successful merit pay plans, many administrators considered an existing adequate base salary one reason for the success. The Midland, Texas, superintendent felt that one reason their system worked was because the starting salaries of teachers were slightly above average (Tursman, 1983, p. 23). According to the assistant superintendent of the Westside Community Schools in Omaha, Nebraska, their excellent base salary helped to make their program a success (Tursman, 1983, p. 23). Breslin and Klagholz, referring to New Jersey colleges, echoed the findings of other investigations into merit pay: "Indeed, one prerequisite of a successful merit plan is a sound salary structure already in place" (1980, p. 43).

Implementation Factor #2

There should be some limit or quota on the number of teachers who may receive rewards.

The notion of limiting the number of teachers who can be awarded merit pay receives more support because of the funding issue than it does because of an idea of a limited number of qualified persons. Many systems, including that in Florida, use a quota on the number of recipients of merit pay. During the first year of implementation (1984-1985), about 3% of Florida's public-school teachers

received bonus payments (Broward-NEA President Gives Away Merit Money, 1985, p. 11).

Within the Charlotte-Mecklenburg merit pay process, each faculty member chooses from an eligibility list those teachers he/she feels are exemplary. No more than 25% of those eligible can be nominated. The administrator also makes choices from the eligibility list. The frequency of an individual's nominations must then place him within the top 20% of the faculty (Selection of Experienced Teachers for Career Candida Status, 1983). In Tennessee, up to 25% of teachers may become senior teachers, with master teachers being limited to 15% (Tursman, 1983, p. 19).

An interesting viewpoint is stated by Piamonte:

Further weakening of the potential power of many merit pay schemes stems from the irrational insistence on the merit pay rewards being 'normally' distributed. ... the logic of the message it gives the employee is obscure. It is not, 'The more you produce, the more financial compensation you will receive,' but rather, 'The more you produce in relation to your peers (a judgment determined by some system you will never really understand), the more financial compensation you will receive.' The effects of the latter message can be expected to be quite different from those of the former.' (1979, p. 624)

Robinson, of the Educational Research Service, felt that merit pay should be available to all who qualify (1983, p. 6). The Florida School Boards Association expected a merit pay program to be based upon criteria, and that all who meet that criteria should qualify (1983, n. p.). In the Keokuk, Iowa, plan, there was no fixed

number, as teachers were not compared with other members of the faculty. In fact, the administrators would have preferred to have had 100% of the teachers receive merit pay (Whitworth, 1970, p. 5).

Mary Hatwood Futrell, president of the National Education Association, spoke for that group of teachers. She stated that a merit pay scheme should not be limited to a small number or percentage of teachers (Stimson, 1983, p. 39).

Implementation Factor #3

The program should be voluntary, and every teacher should be eligible to apply.

In the Charlotte-Mecklenburg plan, only teachers who provided direct delivery of instruction to students on a regularly assigned basis could apply for consideration in the master teacher program for 1985-1986. For the 1986-1987 school year, others will be considered (Selection of Experienced Teachers for Career Candidate Status, 1983).

The American Association of School Administrators felt that merit pay programs should be open to all competent professionals who wish to compete (Tursman, 1983, p. 24). In Florida, a teacher must have four years of teaching experience, at least two of which must have been in Florida (Merit Pay - Florida Style, 1983, p. 1).

Implementation Factor #4

The program should include all classroom teachers, counselors, media specialists, and resource teachers.

In Florida, during the first year of the merit pay program, there was a question about the eligibility of resource teachers and others who did not have regular contact with students. This has been a source of controversy, since some districts allowed resource teachers to apply and others refused.

For 1985-1986, the Charlotte-Mecklenburg plan allowed only teachers with regularly assigned students to apply. This condition is scheduled to change in 1986-1987 (Selection of Experienced Teachers for Career Candidate Status, 1983).

Implementation Factor #5

Teachers who receive extra pay should not be expected to take on extra duties.

In the Charlotte-Mecklenburg program, master teachers must agree to serve as a mentor or member of an advisory/assessment team (Tursman, 1983, p. 22). In Tennessee, master teachers also acquire additional responsibilities (Tursman, 1983, p. 19).

An Association for Supervision and Curriculum Development "Update" reported that in many plans, master teachers are assigned other duties. Included might be

teacher education, staff development, curriculum development, and teacher evaluation. There has arisen role confusion among master teachers and supervisors in some situations (Are Master Teachers Supervisors? Merit Plans Cause Role Confusion, 1983, p. 1).

Implementation Factor #6

Teachers should not be removed from the classroom as part of the program.

In San Mateo, California, those teachers rewarded with merit pay were relieved of their teaching duties for a year so their experience could serve the district in other ways (Whitworth, 1970, p. 22). The National Education Association opposes this practice, on the philosophy that merit pay can reward teachers for remaining in the classroom, so they will not feel the need to seek non-teaching jobs in education in order to increase their income. According to Mary Hatwood Futrell, the association expects that a master teacher plan would reward competence without removing the best teachers from the classroom (Stimson, 1983, p. 39).

Implementation Factor #7

Teachers in shortage areas (such as math and science) should be paid more.

Implementation Factor #8

Teachers in alternative schools/programs should be paid more.

One suggestion for rewarding teachers is to pay those in critical shortage areas (such as math, science, and exceptional education) more than other teachers. In Houston's Second Mile Plan, a bonus is awarded for critical staff shortage areas (Miller and Say, 1982, p. 24).

In a study conducted by Rist, 68.4% of respondents felt that bonuses for understaffed subject areas were unacceptable. However, there were differences of opinions among teachers in the various content areas. Science and math teachers felt that this was acceptable (over 60% of teachers in each category) while few of those in vocational, social studies, and English areas responded favorably (19%, 18.9%, and 16.4% respectively) (1983, p. 25).

Implementation factor #7 dealt with the content within the classroom. Implementation factor #8 (Teachers in alternative schools/programs should be paid more) referred to the overall type of school or program. A bonus is given to teachers who work in high priority locations in the Houston Second Mile Plan (Miller & Say, 1982, p. 24).

Implementation Factor #9

The state should provide the funds for rewarding teachers without cutting back on general funds.

Most articles on merit pay discuss the concept of funding the program. Many of these advocate providing merit pay incentives without affecting salaries of other teachers (Eagan, 1983, p. 2).

The intent of the Charlotte-Mecklenburg program has been to obtain local money for their master teacher program, while pursuing other possible sources. The Florida School Boards Association has recommended that the legislature provide adequate and continued funding for its merit pay plan (1983, n. p.).

Greg Humphrey, then head lobbyist for the American Federation of Teachers, stated that new money should support the program. He felt that there should never be rewards for a few while eroding the salaries of others (Stimson, 1983, p. 40).

Implementation Factor #10

Adequate planning time (at least one year) should be evident before a plan is implemented.

In many cases, successful merit pay plans have been implemented after a considerable amount of time and study have taken place. In the late 1950s, Utah undertook an

extensive study on merit pay and came to a conclusion that merit pay is feasible in systems which have prepared themselves adequately (Utah School Merit Study Committee, 1960, p. 4).

In Florida, the president of the Florida Education Association (an affiliate of the American Federation of Teachers), Pat Tornillo, said he could endorse a merit pay plan, "but he warned that haste in putting the plan into effect could doom merit pay" (Cohen, 1984, n. p.).

Implementation Factor #11

Programs for rewarding teachers should be developed
at the district level.

Many studies concluded that any merit pay program should be developed at the district level with local involvement. Miller and Say reported on the Houston Second Mile Plan. They concluded that "Any other school system considering adopting some form of incentive pay should realize that its plan must be tailored to the specific needs of its system" (1982, p. 25).

The Utah School Merit Study Committee reported in 1960 that any attempt to impose a merit pay plan on a local district would be damaging to the long-term development of the program. One recommendation read: "THE STATE LEGISLATURE SHOULD REENACT PERMISSIVE LEGISLATION TO

ENCOURAGE QUALIFIED LOCAL SCHOOL DISTRICTS TO ESTABLISH PERSONNEL EVALUATION AND MERIT SALARY PROGRAMS" (sic) (p. 4).

Implementation Factor #12

Teachers should be involved in planning the system of rewarding teachers.

Systems of rewarding teachers involve the structuring of a salary schedule for those teachers. Eymonerie referred to a college study when she stated that a salary structure is most effective if it is thoroughly understood. She concluded that it is best if the faculty participates in formulating the plan and effecting policy (1980, p. 118).

A related area in which teachers might feel they should have a role is in their evaluation, which is an integral part of any plan for compensating teachers. Young and Heichberger (1975, p. 11) found that "Teachers strongly feel they should play a role in the development of a school evaluation program." Pine and Boy discussed negative teacher attitude toward evaluation and the evaluation process. They contended that "Teacher resistance to evaluation will be overcome when teachers have a significant voice in designing and carrying out evaluation procedures" (1975, p. 19).

A subcommittee of the United States House of Representatives studied the concept of merit pay, and recommended the involvement of teachers, administrators, and the community in establishing evaluation criteria (Perkins, 1983, p. 7). Robinson (Educational Research Service) encouraged staff involvement in program development (1983, p. 5), while the American Association of School Administrators said that all those affected by a program should be involved in the planning process, including teachers (Tursman, 1983, p. 24).

Implementation Factor #13

Business persons should be involved in planning the system of rewarding teachers.

In the past few years, business persons have encouraged educators to upgrade their standards to improve the quality of students entering the work force. Merit pay has been cited as a method of rewarding good teachers, and in turn improving the quality of education. Some feel that the business community should be involved in planning a merit pay program.

The American Association of School Administrators (Tursman, 1983) recommended that all persons or groups who financially and politically support the plan should be involved in the planning stages. Included in their list of

participants would be parents, the school board, business leaders, and the community (p. 24).

Implementation Factor #14

Legislators should be involved in planning
the system of rewarding teachers.

In the United States, the states are responsible for providing public education for their children. The primary funding source for education is through the states. By 1960, Florida could not afford to pay more for its teachers. The state used a merit system to pay extra to those teachers perceived to be better, and therefore was able to hold down instructional costs. The political involvement by the legislature was considered one reason for the failure of the system (Whitworth, 1970, p. 10).

Utah concluded an extensive merit pay study in 1960. The extent of legislative involvement they suggested was in encouraging local school districts to develop and implement their own merit pay programs (Utah School Merit Study Committee, 1960, p. 6).

Implementation Factor #15

Teachers should be involved in implementing
a system of rewarding teachers.

The importance of participant involvement in the planning and implementing of a merit pay program has been

mentioned in many articles. At the Red River Army Depot in Texarkana, the ASK ME program was developed for giving rewards based on merit. According to McCloskey and Johnson, the "best thing of all concerning the system is the fact that we did it together: the workforce, the union, managers and everyone" (1978, p. 446).

Tursman reviewed surveys, interviews, and local merit pay plans in 1983. She concluded that teachers should be involved from start to finish (1983, p. 19). More specifically, Breslin and Klagholz described the salary programs in New Jersey colleges. They concluded that "an essential condition for any merit pay system is the central role of faculty in the evaluation process" (1980, p. 44).

Implementation Factor #16

Teachers should be involved in evaluating and
revising a system of rewarding teachers.

It has been suggested that any system of merit pay should be evaluated and revised periodically, and that teachers should be involved in that process. Breslin and Klagholz recommended that faculty take a central role in merit pay systems in New Jersey colleges (1980, p. 44). Tursman's review of surveys, local plans, and interviews led her to conclude that teachers should be involved in all phases of implementation (1983, p. 19).

Implementation Factor #17

There should be an appeals process available to teachers.

One of the areas in which teacher organizations have consistently argued in the bargaining process is the right of due process for their members in disputes with the administration (Lipsky, Bacharach, & Shedd, 1984, p. 25; Task Force to Study Merit Pay for Teachers in North Dakota, 1984, p. 9). Included is generally a process for appealing decisions that might be disputed. An appeals process was added to the Tennessee bill for its master teacher program (Tursman, 1983, p. 22).

Implementation Factor #18

Those who perform the evaluations should receive
special training.

An important part of the merit pay process is the evaluation of teachers. It has been suggested that those persons who serve as evaluators should receive training in the criteria to be used in assessing teachers (Delaware State Education Association, 1984, p. 12; Maryland State Teachers Association, n. d., p. 21).

The Charlotte-Mecklenburg plan addressed the training of the observer/evaluator. Their plan included a special training program to be held for one month in the summer (Selection of Experienced Teachers for Career Candidate Status, 1983). The Florida School Boards Association

recommended that trained evaluators using objective criteria be used in the program (1983, n. p.).

Implementation Factor #19

Funds should be made available for the training of evaluators.

It has been discussed that those who evaluate teachers for a merit pay program should have special training. The Florida School Boards Association has recommended that sufficient funds be made available for this training (1983, n. p.).

Trainees in the Charlotte-Mecklenburg plan are paid for their participation. They also received \$2,000 extra for each year they served in the position (Selection of Experienced Teachers for Career Candidate Status, 1983).

Implementation Factor #20

There should be a committee of evaluators, rather than one administrator.

The use of a committee of evaluators, rather than one administrator, has been a part of some merit pay programs. Pine and Boy suggested that the evaluation process should be a cooperative one, involving other teachers, supervisory staff, and the principal, with emphasis on self-evaluation (1975, p. 20). In the Charlotte-Mecklenburg plan, there are nominations made by both peers and administrators.

Then an advisory/assessment team is formed for each teacher within the quota (Selection of Experienced Teachers for Career Candidate Status, 1983).

Holzburg described some alternative suggestions for evaluations: a combination of administrators and teachers, a group of teachers only, a student rating, and even a self-rating. However, he felt that none of the plans has overcome the basic problem of the lack of objective standards (1974, p. 101).

Another concern was raised by Centra. He felt that "colleagues ratings of teaching effectiveness based primarily on classroom observation would in most instances not be reliable enough to use in making decisions on tenure and promotion" (1975, p. 327). Paramore felt that peer evaluation would "destroy unity" (1984, p. 11).

Rist did find in his study that elementary teachers preferred to be evaluated by their principals. As the grade level assignment increased, this became less true (1983, p. 26).

Terrell Bell, former Secretary of the Department of Education, has pointed out that a "master teacher" program may be different from a "merit pay" program. With the master teacher concept, a higher status is conferred upon the recipient through a peer review process (Stimson, 1983, p. 39).

Implementation Factor #21

A committee of evaluators should be primarily from
within the teacher's district.

Breslin and Klagholz reported on a study of New Jersey colleges. They stated that "Using external consultants is one means for ensuring an objective selection process" (1980, p. 44). In the Charlotte-Mecklenburg plan, the position of observer/evaluator was to be held outside the context of the school. In fact, these persons would probably not be assigned to their own school (Selection of Experienced Teachers for Career Candidate Status, 1983).

Some of Minnesota's "teachers of the year" were interviewed in 1983. Several complained that money spent by some districts on outside evaluators could have been used to help teachers in ways such as providing more supplies and lowering class size (Paulu & Wascoe, 1983, p. 12A).

Implementation Factor #22

A committee of evaluators should be primarily from
the teacher's teaching field/service area.

There are some educators who feel that consideration must be given to the grade and/or subject a person teaches. An Iowa report supported this suggestion, noting that the particular job a teacher is expected to perform varies with the grade (Whitworth, 1970, p. 3).

Evaluators in Charlotte-Mecklenburg are trained generically rather than by teaching field. After the initial evaluation process, however, a teacher might ask to be observed by someone in his/her field (Selection of Experienced Teachers for Career Candidate Status, 1983).

In Florida, the evaluation process has involved two observations. One observer was usually the teacher's principal. If an adequate score is not obtained on the first two observations, a teacher can request another observation by a third educator.

Implementation Factor #23

An evaluation instrument should stress performance on the job in the assigned area.

There are some suggestions for incentive programs which consider activities outside the classroom in rewarding teachers. The Charlotte-Mecklenburg program, however, trains its evaluators to observe a teacher's performance in the classroom (Selection of Experienced Teachers for Career Candidate Status, 1983).

Blank examined several studies at the college level. He discovered that "Recent time-series data indicate increases in faculty members support for using teaching performance as a means of evaluation" (1978, p. 164).

Implementation Factor #24

All records of evaluations should be confidential.

There are some merit pay programs which do not include publication of salary and/or evaluation information. In Keokuk, Iowa, "Information (salaries) on merit is not published" (Whitworth, 1970, p. 5). The Charlotte-Mecklenburg system also maintained observation/evaluation confidentiality (Selection of Experienced Teachers for Career Candidate Status, 1983).

Implementation Factor #25

Each teacher should have access to his/her own records.

Teacher organizations have long felt that teachers should have access to any information in their personnel files. Organizations have included this in their position and policy statements. One example is within the Texas State Teachers Association Position on Current Educational Issues and Recommendations to the Texas Board of Education (Fall, 1984, p. 2).

APPENDIX 3

REQUEST FOR ENDORSEMENT OF THE STUDY
BY THE INSTRUCTION AND PROFESSIONAL DEVELOPMENT COMMITTEE
OF THE ORANGE COUNTY CLASSROOM TEACHERS ASSOCIATION

PROPOSAL to Orange County Classroom Teachers Association Instruction and Professional Development Committee:

To endorse the administration of a survey on merit pay factors and implementation at the 1984 FTP-NEA Representative Assembly.

Reasons:

1. To aid local IPD member and delegate to the Representative Assembly complete dissertation.
2. To provide current data relevant to both the Orange County Classroom Teachers Association and FTP-NEA.

Proposed Procedures:

1. Obtain endorsement from local IPD committee.
2. Request permission from state organization.
3. Develop, and revise as necessary, the instrument.
4. Print survey form.
5. Distribute questionnaire at Assembly, preferably through delegate Packets.
6. Collect and analyze data.
7. Distribute summary of data to Orange County IPD and FTP-NEA.

PROPOSED CONTENT OF QUESTIONNAIRE

Background Information:

Male ☐ Female ☐
 Age: 20-30 ☐ 31-40 ☐ 41-50 ☐ over 50 ☐
 Elementary ☐ Secondary ☐
 If secondary: Math ☐ Science ☐ Language Arts ☐ Social Studies ☐
 Fine Arts ☐ Vocational ☐ Guidance ☐ Media ☐
 Years of experience: 0-5 ☐ 6-10 ☐ 11-15 ☐ over 15 ☐
 Highest degree: Bachelor's ☐ Master's in field ☐
 Master's out of field ☐ Specialist ☐
 Doctorate ☐
 School district

I. MERIT PAY FACTORS

Assume that a program is being implemented in your school district to reward teachers with extra pay. Assume that there is no limit to the number of teachers who can be rewarded, and no limit to the funds available to implement this program. How important do you think the following factors should be in determining which teachers should receive the extra pay?

5 = very important

1 = not important

- | | | | | | |
|---|---|---|---|---|---|
| 1. Teaching experience/number of years teaching | 5 | 4 | 3 | 2 | 1 |
| 2. Master's degree/in field | | | | | |
| 3. Master's degree/out of field | | | | | |
| 4. Specialist degree | | | | | |
| 5. Doctorate degree | | | | | |

6. Standardized student test scores
7. Standardized teacher test scores
8. In-service courses/points
9. Additional areas of certification
10. Professional involvement/committees, offices held
11. Local committee representation/advisory council
12. Professional writing
13. Conducting workshops/locally
14. Conducting workshops/ state, regional, national
15. Job-related extra-curricular duties
16. Number of days absent
17. Peer observations
18. Administrative evaluation
19. Classroom performance
20. Number of different preparations

II. IMPLEMENTATION OF THE PROGRAM

Assume again that funds are available to reward teachers with extra pay. To what degree do you agree with each of these statements?

5 = strongly agree

1 = strongly disagree

1. All teachers should receive more money before any teacher is rewarded.
2. An evaluation instrument should stress performance.
3. There should be a limit to the number of teachers who receive rewards
4. Programs for rewarding teachers should be developed at the district level.
5. Adequate planning time (at least one year) should be evident before a program is implemented.
6. The state should provide funds for rewarding teachers without cutting back on general funds.
7. Teachers should be involved in planning a program for rewarding teachers.
8. Teachers should be involved in implementing the program.
9. Teachers should be involved in evaluating and revising the program.
10. The program should be voluntary, and open to all teachers.
11. The program should include persons in all teacher positions.
12. There must be an appeals process.
13. There must be a committee of evaluators.
14. Those who perform evaluations must be trained.
15. Funds must be made available for training evaluators.
16. All records of evaluations must be confidential.
17. All teachers must have access to their records.
18. Teachers rewarded must not be forced to take on extra duties.
19. Teachers must not be removed from the classroom.
20. Teachers in shortage areas should be paid more.

APPENDIX 4

REQUEST TO THE PRESIDENT
OF THE FLORIDA TEACHING PROFESSION -
NATIONAL EDUCATION ASSOCIATION
TO CONDUCT THE STUDY

2239 Coventry Drive
Winter Park, Florida 32792
March 14, 1984

Ms. Ruth Holmes
President
Florida Teaching Profession-National Education Association
213 South Adams Street
Tallahassee, Florida 32301

Dear Ms. Holmes:

I am an itinerant teacher in Orange County, a member of the Orange County Classroom Teachers Association, and a member of our local Instruction and Professional Development Committee. I have taken on a personal "challenge": I am working on my doctoral dissertation through the University of Central Florida and Florida Atlantic University. I would like some help from FTP/NEA, but in turn I believe I will be providing a much-needed service to the organization.

The tentative title of my dissertation is "A Study of Merit Pay Factors as Perceived by Various Teacher Groups." As the title implies, I would like to survey teachers in order to learn their perceptions of the merit pay evaluation factors and merit pay implementation factors which I have found cited most often in the literature on past, present, and anticipated merit pay programs.

Until now, I had been having problems determining a target group and procedures. Recently I was elected a delegate to the FTP-NEA Representative Assembly in April, and the solution to my problem seemed to appear. If I could receive permission to distribute my survey at this meeting, not only could I proceed with my dissertation, but also provide some current data to my professional organization.

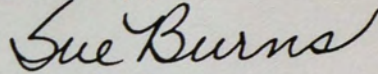
I talked with Punch Edinger and Doe Fedrick here in Orange County. They suggested that I first receive endorsement from our local IPD committee, which I did receive on March 6. My next step was to contact you and learn what "official" procedures I need to follow.

I am enclosing my preliminary instrument. This will be revised, probably several times. My doctoral committee will need to review and approve my instrument as well as procedures. However, should they not approve, I would continue with any plan we might have decided upon, and provide as much of the data and statistics as I can.

At this time I am asking two questions for your consideration. Is my plan to survey delegates in April feasible? If so, what process do I now need to begin in order to best continue with this project?

I thank you in advance for your support, and hope to hear from you soon.

Sincerely,

A handwritten signature in cursive script that reads "Sue Burns".

Susan C. Burns

cc Doretha Fedrick, President, Orange County Classroom Teachers Association

Frank Campbell, Chairperson, Orange County Instruction and Professional Development Committee

APPENDIX 5

REPLY FROM THE PRESIDENT
OF THE FLORIDA TEACHING PROFESSION -
NATIONAL EDUCATION ASSOCIATION

**FLORIDA TEACHING PROFESSION • NATIONAL EDUCATION ASSOCIATION**

213 SOUTH ADAMS STREET • TALLAHASSEE, FLORIDA 32301 • (904) 222-4702

March 27, 1984

Ms. Susan C. Burns
2239 Coventry Drive
Winter Park, FL 32792

Dear Sue:

Thank you for your letter of March 14, 1984 concerning your survey on merit pay. I have given your request much thought and consideration.

As I am sure you are aware, on February 21, 1984, the Florida Cabinet adopted the rules to implement the Florida Meritorious Instructional Personnel Program. On February 24, 1984, the FTP-NEA Board of Directors adopted the attached position regarding this program.

While I appreciate your problem of determining a target group for your survey, I do not think it is feasible to survey the delegates during the FTP-NEA Representative Assembly in April. We are often approached by individuals or groups wishing to survey our delegates on issues pertaining to education. We have denied these requests because of setting a precedent and opening up the opportunity of having the delegates spend valuable time answering surveys.

However, in the interest of wanting to be of service to our members, may I offer you some suggestions?

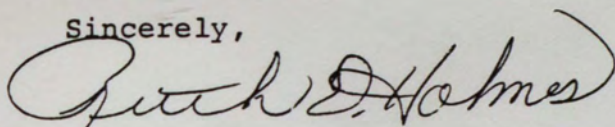
1. You may distribute your survey at the conclusion of the Representative Assembly with a request that the delegates complete it and return it to you. If you choose to do this, you may obtain more responses if you include a self-addressed, stamped envelope for their convenience.
2. You may send your survey to our local presidents and request that they have their members complete the survey at one of their meetings, i.e., Building Rep meeting or local Board of Directors meeting.

I hope these suggestions will be of help to you. I wish you good luck with your doctoral dissertation. If I can be of any help to you, please feel free to contact me.

Ms. Susan C. Burns
Page Two
March 27, 1984

I look forward to seeing you at our Representative Assembly in April.

Sincerely,

A handwritten signature in cursive script, reading "Ruth D. Holmes". The signature is written in dark ink and is positioned to the left of the typed name.

Ruth D. Holmes
President

RDH:ss
Attachment

cc: Doretha Fedrick, President, Orange County
Classroom Teachers Association

Frank Campbell, Chairperson, Orange County
Instruction and Professional Development
Committee

APPENDIX 6

THE PRELIMINARY INSTRUMENT

FTP-NEA REPRESENTATIVE ASSEMBLY, APRIL, 1984BACKGROUND INFORMATION

Male _____ Female _____

Age: 20-30 _____ 31-40 _____ 41-50 _____ over 50 _____

Years of Teaching Experience: 0-5 _____ 6-10 _____
 11-15 _____ more than 15 _____

Highest Degree Earned: Bachelors _____ Masters (in field) _____
 Masters (out of field) _____
 Specialist _____ Doctorate _____

Elementary _____ Secondary _____ College _____ Other _____

If Secondary: Math _____ Science _____ Lang. Arts _____
 Soc. St. _____ Fine Arts _____ Voc. _____
 Guidance _____ Media _____ Other _____

School District _____

A- MERIT PAY EVALUATION FACTORS

ASSUME THAT A PROGRAM IS TO BE IMPLEMENTED IN YOUR SCHOOL DISTRICT TO REWARD TEACHERS WITH EXTRA PAY. ASSUME THAT THERE IS NO LIMIT TO THE NUMBER OF TEACHERS WHO CAN BE REWARDED, AND NO LIMIT TO THE FUNDS AVAILABLE TO IMPLEMENT THIS PROGRAM. THE FOLLOWING FACTORS ARE BEING CONSIDERED IN DETERMINING WHICH TEACHERS SHOULD RECEIVE THE EXTRA PAY. TO WHAT DEGREE DO YOU AGREE WITH EACH OF THESE FACTORS?

1 - strongly agree 2 - moderately agree 3 - slightly agree
 4 - slightly disagree 5 - moderately disagree 6 - strongly disagree

- | | |
|--|-------------|
| 1) Teaching experience/number of years teaching | 1 2 3 4 5 6 |
| 2) Masters degree/in field | 1 2 3 4 5 6 |
| 3) Masters degree/out of field | 1 2 3 4 5 6 |
| 4) Additional degree(s) | 1 2 3 4 5 6 |
| 5) Standardized student test score(s) | 1 2 3 4 5 6 |
| 6) Standardized teacher test score(s) | 1 2 3 4 5 6 |
| 7) Inservice courses/points earned | 1 2 3 4 5 6 |
| 8) Additional areas of certification | 1 2 3 4 5 6 |
| 9) Professional involvement/committee representation | 1 2 3 4 5 6 |
| 10) Conducting workshops/making presentations | 1 2 3 4 5 6 |

11) Job-related extra-curricular duties	1 2 3 4 5 6
12) Number of days absent	1 2 3 4 5 6
13) Peer observations/evaluations	1 2 3 4 5 6
14) Administrative evaluation/classroom performance	1 2 3 4 5 6
15) Number of different preparations	1 2 3 4 5 6

B- MERIT PAY IMPLEMENTATION FACTORS

TO WHAT DEGREE DO YOU AGREE WITH EACH OF THESE STATEMENTS DEALING WITH IMPLEMENTATION OF A MERIT PAY PROGRAM?

1 - strongly agree 2 - moderately agree 3 - slightly agree
4 - slightly disagree 5 - moderately disagree 6 - strongly disagree

1) ALL teachers should receive more money before any teacher is rewarded.	1 2 3 4 5 6
2) There should be a limit to the number of teachers who receive rewards.	1 2 3 4 5 6
3) Programs for rewarding teachers should be developed at the district level.	1 2 3 4 5 6
4) Adequate planning time (at least one year) should be evident before a program is implemented.	1 2 3 4 5 6
5) The state should provide funds for rewarding teachers without cutting back on general funds.	1 2 3 4 5 6
6) The program should be voluntary, and any teacher should be eligible to apply.	1 2 3 4 5 6
7) The program should include all teachers, such as counselors, media, and resource teachers.	1 2 3 4 5 6
8) Teachers should be involved in planning a program to reward teachers.	1 2 3 4 5 6
9) Teachers should be involved in implementing a program to reward teachers.	1 2 3 4 5 6
10) Teachers should be involved in evaluating and revising a program to reward teachers.	1 2 3 4 5 6
11) There should be an appeals process available.	1 2 3 4 5 6
12) There should be a committee of evaluators, not just one administrator.	1 2 3 4 5 6
13) An evaluation instrument should stress performance on the job.	1 2 3 4 5 6
14) Those who perform evaluations should be trained.	1 2 3 4 5 6
15) Funds must be made available for training evaluators.	1 2 3 4 5 6
16) All records of evaluation should be confidential.	1 2 3 4 5 6
17) All teachers should have access to these records.	1 2 3 4 5 6
18) Teachers who receive extra pay should not be forced to take on extra duties.	1 2 3 4 5 6
19) Teachers must not be removed from the classroom as part of the program.	1 2 3 4 5 6
20) Teachers in shortage areas such as math and science should be automatically paid more.	1 2 3 4 5 6

APPENDIX 7

THE FINAL INSTRUMENT

****BACKGROUND INFORMATION****

Name of FTP-NEA Affiliate _____

POSITION: Building Representative _____ Local Board Member _____
 State Board Member _____ Other (please specify) _____

SEX: Male _____ Female _____

RACE: Black _____ White _____ Other _____

AGE: 20-30 _____ 31-40 _____ 41-50 _____ over 50 _____

YEARS OF TEACHING EXPERIENCE: 0-5 _____ 6-10 _____ 11-15 _____ over 15 _____

HIGHEST DEGREE NONE _____ ASSOCIATE _____ BACHELOR'S _____
 EARNED: MASTER'S _____ SPECIALIST _____ DOCTORATE _____

ASSIGNMENT: Elementary _____ Secondary _____ College _____
 Elementary Support _____ Secondary Support _____
 Other (please specify) _____

IF SECONDARY: Math _____ Science _____ Lang. Arts _____
 Soc. St. _____ Fine Arts _____ Vocational _____
 Guidance _____ Media _____ Other _____

ASSUME THAT A PROGRAM IS TO BE IMPLEMENTED IN YOUR SCHOOL DISTRICT TO REWARD TEACHERS WITH EXTRA PAY ABOVE THE BASE SALARY. ASSUME THAT THERE IS NO LIMIT TO THE NUMBER OF TEACHERS WHO CAN BE REWARDED, AND NO LIMIT TO THE FUNDS AVAILABLE TO IMPLEMENT THE PROGRAM. THE FOLLOWING FACTORS ARE BEING CONSIDERED IN DETERMINING WHICH TEACHERS SHOULD RECEIVE THE EXTRA PAY.

TO WHAT DEGREE DO YOU AGREE WITH EACH OF THESE FACTORS?

1--Strongly Agree 2--Agree 3--Disagree 4--Strongly Disagree

- | | |
|--|---------|
| (1) Teaching experience/number of years teaching | 1 2 3 4 |
| (2) Master's degree | 1 2 3 4 |
| (3) Additional advanced degrees | 1 2 3 4 |
| (4) Standardized student test scores, by teacher | 1 2 3 4 |
| (5) Standardized student test scores, by school | 1 2 3 4 |
| (6) Standardized teacher test scores | 1 2 3 4 |
| (7) Inservice participation/points earned | 1 2 3 4 |
| (8) Additional areas of certification | 1 2 3 4 |
| (9) Professional involvement/committee representation | 1 2 3 4 |
| (10) Conducting workshops/making presentations at county, state or national meetings | 1 2 3 4 |
| (11) Job-related extra-curricular duties | 1 2 3 4 |
| (12) Number of different preparations/grade levels | 1 2 3 4 |
| (13) Number of days absent | 1 2 3 4 |
| (14) Peer observations/evaluations | 1 2 3 4 |
| (15) Administrator observations/evaluations | 1 2 3 4 |

*COMMENTS ON EVALUATION FACTORS _____

THE FOLLOWING FACTORS DEAL WITH THE IMPLEMENTATION OF A MERIT
PAY PROGRAM.

TO WHAT DEGREE DO YOU AGREE WITH EACH OF THESE FACTORS?

1--Strongly Agree 2--Agree 3--Disagree 4--Strongly Disagree

- | | | | | |
|--|---|---|---|---|
| (1) All teachers should receive more money before any teacher is rewarded. | 1 | 2 | 3 | 4 |
| (2) There should be some limit or quota on the number of teachers who may receive rewards. | 1 | 2 | 3 | 4 |
| (3) The program should be voluntary, and every teacher should be eligible to apply. | 1 | 2 | 3 | 4 |
| (4) The program should include all classroom teachers, counselors, media specialists, and resource teachers. | 1 | 2 | 3 | 4 |
| (5) Teachers who receive extra pay should not be expected to take on extra duties. | 1 | 2 | 3 | 4 |
| (6) Teachers should not be removed from the classroom as part of the program. | 1 | 2 | 3 | 4 |
| (7) Teachers in shortage areas (such as math and science) should be paid more. | 1 | 2 | 3 | 4 |
| (8) Teachers in alternative schools/programs should be paid more. | 1 | 2 | 3 | 4 |
| (9) The state should provide the funds for rewarding teachers without cutting back on general funds. | 1 | 2 | 3 | 4 |
| (10) Adequate planning time (at least one year) should be evident before a plan is implemented. | 1 | 2 | 3 | 4 |
| (11) Programs for rewarding teachers should be developed at the district level. | 1 | 2 | 3 | 4 |
| (12) Teachers should be involved in planning the system of rewarding teachers. | 1 | 2 | 3 | 4 |
| (13) Business persons should be involved in planning the system of rewarding teachers. | 1 | 2 | 3 | 4 |
| (14) Legislators should be involved in planning the system of rewarding teachers. | 1 | 2 | 3 | 4 |
| (15) Teachers should be involved in implementing a system of rewarding teachers. | 1 | 2 | 3 | 4 |
| (16) Teachers should be involved in evaluating and revising a system of rewarding teachers. | 1 | 2 | 3 | 4 |
| (17) There should be an appeals process available to teachers. | 1 | 2 | 3 | 4 |
| (18) Those who perform the evaluations should receive special training. | 1 | 2 | 3 | 4 |
| (19) Funds should be made available for the training of evaluators. | 1 | 2 | 3 | 4 |
| (20) There should be a committee of evaluators, rather than one administrator. | 1 | 2 | 3 | 4 |
| (21) A committee of evaluators should be primarily from within the teacher's district. | 1 | 2 | 3 | 4 |
| (22) A committee of evaluators should be primarily from the teacher's teaching field/service area. | 1 | 2 | 3 | 4 |
| (23) An evaluation instrument should stress performance on the job in the assigned area. | 1 | 2 | 3 | 4 |
| (24) All records of evaluations should be confidential. | 1 | 2 | 3 | 4 |
| (25) Each teacher should have access to his/her own records. | 1 | 2 | 3 | 4 |

*COMMENTS ON IMPLEMENTATION FACTORS _____

APPENDIX 8

SAMPLE LETTER TO THE FTP-NEA
STATE BOARD OF DIRECTORS

I am a member of the Orange County Classroom Teachers Association, a member of our local IPD Committee, and a student at the University of Central Florida. And I need your help!

The title of my doctoral dissertation is "A Study of Merit Pay Factors as Perceived by Members of the Florida Teaching Profession-National Education Association." As the title implies, I am surveying members in order to learn their perceptions of the merit pay evaluation factors and merit pay implementation factors which I have found cited most often in the literature on past, present, and anticipated merit pay plans.

Originally, I had hoped to distribute my survey at the FTP-NEA Representative Assembly at the end of April. However, Ruth Holmes told me that the policy of FTP-NEA is to not allow such personal surveys at the convention. She did suggest that I write to local presidents and ask for their help.

I have written to local presidents and asked that they distribute the survey to their Building Representatives and members of their Board of Directors. I would also like the opinions of members of our State Board of Directors. Please take a few minutes to complete the survey form and the yellow form and return them to me in the enclosed envelope. Your responses, of course, will remain confidential.

Thank you in advance for your assistance. Copies of my findings will be made available to FTP-NEA. Any additional information you can share with me will be most helpful, both for my dissertation and as background for FTP-NEA as Florida's merit pay program is implemented and-revised.

Sincerely,

Susan C. Burns

APPENDIX 9

LETTER TO THE PRESIDENT
OF THE UNITED FACULTY OF FLORIDA

On May 21, I talked with you by phone about my doctoral dissertation titled "A Study of Merit Pay Factors as Perceived by Members of the Florida Teaching Profession-National Education Association." At that time you gave me some useful suggestions, and said that you would help me by sending me a list of the names and addresses of your Building Representatives or University Contacts, and the members of your Board of Directors. I had said that I would then contact each representative personally.

I would like to begin to analyze the results of the survey soon, but I have not received responses from all districts, nor have I received a list of your representatives.

Enclosed are two survey forms for your records. There is another for you to complete as a local Board member, as well as a yellow information sheet. You may want to return these forms in the enclosed envelope when you send your list of representatives. [I'm sending two sets of forms, one to your home and one to the office, expecting that at least one will reach you!]

I have received several replies so far, and I'm getting excited about the potential results of this survey. When I have the results from UFF, I will be much closer to completing my project, and providing some current data for our state organization.

Sincerely,

Susan C. Burns

APPENDIX 10

LETTER TO MEMBERS OF THE BOARD OF DIRECTORS
OF THE UNITED FACULTY OF FLORIDA

I am a member of the Orange County Classroom Teachers Association, a member of our local IPD Committee, and a student at the University of Central Florida. And I need your help!

The title of my doctoral dissertation is "A Study of Merit Pay Factors as Perceived by Members of the Florida Teaching Profession-National Education Association." As the title implies, I am surveying members in order to learn their perceptions of the merit pay evaluation factors and merit pay implementation factors which I have found cited most often in the literature on past, present, and anticipated merit pay plans.

Originally, I had hoped to distribute my survey at the FTP-NEA Representative Assembly at the end of April. However, Ruth Holmes told me that the policy of FTP-NEA is to not allow such personal surveys at the convention. She did suggest that I write to the presidents of our local organizations and ask for their help.

I contacted Dr. Roy Weatherford, president of UFF, and asked for a list of 1983-1984 Faculty Representatives. This summer he sent me that list of members of the State University Council. I am asking that you take a few minutes to complete the enclosed Merit Pay Survey and return it to me in the enclosed envelope. I also ask that you make a note of any additional sources of research or information on merit pay that I may have overlooked.

The question of merit pay here in Florida seems to have been forgotten, but this is only temporary. The Legislature still appears to be determined to implement some type of merit pay program. It is crucial that our state organization have current data on the opinions and feelings of its members throughout the state. My findings, of course, will be made available to FTP-NEA.

Thank you in advance for your assistance. Your perceptions are important for this study, and these results will also be important to our state professional organization.

Sincerely yours,

Susan C. Burns

APPENDIX 11

SAMPLE REQUEST TO PRESIDENTS
OF LOCAL FTP-NEA AFFILIATES

I am a member of the Orange County Classroom Teachers Association, a member of our local IPD Committee, and a student at the University of Central Florida. And I need your help!

The title of my doctoral dissertation is "A Study of Merit Pay Factors as Perceived by Members of the Florida Teaching Profession-National Education Association." As the title implies, I am surveying members in order to learn their perceptions of the merit pay evaluation factors and merit pay implementation factors which I have found cited most often in the literature on past, present, and anticipated merit pay plans.

Originally, I had hoped to distribute my survey at the FTP-NEA Representative Assembly at the end of April. However, Ruth Holmes told me that the policy of FTP-NEA is to not allow such personal surveys at the convention. However, she did suggest that I write to the presidents of our local organizations and ask for their help.

I am asking that you distribute and collect the enclosed questionnaires to your building or faculty representatives and your Board of Directors, preferably at a meeting of each group. The survey should take about ten minutes to complete. Enclosed are yellow cover letters which you may want to use if you must send these to your members individually. I am enclosing a self-addressed, stamped envelope for you to return the completed forms to me. The analysis will be done over the summer, so please take the time to return as many forms as possible.

Thank you in advance for your assistance. Copies of my findings will be made available to our state organization. Please complete the enclosed blue form, so that I will know if you would like to see the results. Any additional information you can share with me will be most helpful, both for my dissertation, and as background information for FTP-NEA as Florida's merit pay program is implemented and revised.

Thank you again,

Susan C. Burns

APPENDIX 12

COVER LETTER FOR QUESTIONNAIRE

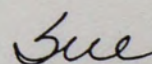
DEAR FELLOW FTP-NEA MEMBER!

I am a member of the Orange County Classroom Teachers Association, and I need your help!

My doctoral dissertation, through the University of Central Florida, is titled "A Study of Merit Pay Factors as Perceived by Members of the Florida Teaching Profession-National Education Association." Ruth Holmes, our state president, suggested that I ask local presidents for help in distributing my survey. And your president has agreed.

Please complete the attached two-page survey form and return it to your president as soon as possible. It should take just a few minutes, and will provide some valuable information, not only for my dissertation, but also for our state professional organization.

Thank you very much for your time and your ideas!



Sue Burns
OCCTA

APPENDIX 13

SAMPLE FOLLOW-UP LETTER TO LOCAL PRESIDENTS

On May 14, I talked with you on the phone about my doctoral dissertation titled "A Study of Merit Pay Factors as Perceived by Members of the Florida Teaching Profession-National Education Association." At that time, you had said that you would help me by distributing the survey to your Building Representatives and local Board members. On May 15, I sent you 140 copies of the survey with a possible cover letter and a stamped return envelope.

I would like to begin to analyze the results of the survey, but I have not yet received replies from every local organization. If you have your completed forms, would you please return them to me now. If you were not able to distribute the forms, I will be happy to contact individually your Building Representatives and local Board members if you provide me with a list of names and home addresses. I will enclose a cover letter explaining my project as well as a stamped return envelope.

I have received several replies so far, and I'm getting excited about the potential results of this survey. When the results are in from the Volusia CTD, I will be one step closer to completing my project and providing some current data to our state organization.

My thanks in advance for your help.

Sincerely,

Susan C. Burns

APPENDIX 14

INFORMATION FORM COMPLETED BY LOCAL PRESIDENTS

NAME OF FTP-NEA AFFILIATE _____

PRESIDENT _____

How many forms did you distribute at a meeting of building
or faculty representatives? _____

How many forms did you distribute at a meeting of your Board
of Directors? _____

How many forms did you send to members individually? _____

Would you like a copy of the findings of my study? _____

What local circumstances, or conditions, would give more
meaning to the results for your district? _____

Do you have any additional information or sources of information
on merit pay which I may have not had access to? _____

NOTE: IF YOU HAVE COPIES OF LOCAL FLYERS OR NEWSLETTERS
WHICH YOU HAVE DISTRIBUTED TO YOUR MEMBERS, I WOULD
APPRECIATE SEEING THEM.

Please return with surveys to:

Susan C. Burns
2239 Coventry Drive
Winter Park, FL 32792

APPENDIX 15

FORM COMPLETED BY STATE BOARD MEMBERS

Position on Board _____

What conditions or circumstances, either here in Florida or in the rest of the United States, are you aware of which might make my study more meaningful? _____

What research sources do you know about which I may have not had access to? _____

Briefly, how do you personally feel about the concept of merit pay and the development of the program here in Florida? _____

What do you predict to be the future of merit pay here in Florida? _____

APPENDIX 16

SUMMARY OF LOCAL PRESIDENTS' RESPONSES

The following comments are quoted directly from the respondents' information forms.

WHAT LOCAL CIRCUMSTANCES, OR CONDITIONS, WOULD GIVE MORE MEANING TO THE RESULTS FOR YOUR DISTRICT?

"Continued communications for all rep's as soon as possible"

"We have just rejected local school based merit pay at negotiating table."

"This is the 9th merit pay survey (to be given to Leon teachers) in two months - the enthusiasm was low"

"There are so many unhappy & angry teachers since merit pay came up. The results of this survey & study might help teachers."

"We had trouble just getting FSDB <Florida School for the Deaf and Blind> included in the state merit pay program (we're not a school district)"

"PCTA initiated and maintains a Merit Pay Boycott"

"poor teacher/admin relationships"

APPENDIX 17

SUMMARY OF STATE BOARD MEMBERS' RESPONSES

The following comments are quoted directly from respondents' returned information forms.

BRIEFLY, HOW DO YOU PERSONALLY FEEL ABOUT THE CONCEPT OF MERIT PAY AND THE DEVELOPMENT OF THE PROGRAM HERE IN FLORIDA?

The Fla Merit Pay Plan is illconceived and it is based upon strong political rather than sound educational motives. It is not based upon the findings of research and, indeed, is often contrary to research findings."

"If a teacher has no merit, he/she should not be teaching. All of those who are teaching should be adequately reimbursed. Florida's program is a disastrous results of politics at its worst ... fool the people into thinking they're getting better public education, blame the problems on teachers, save money by making token contributions to educational improvement, and avoid the cost (& the problems explaining it to voters) of raising teachers' salaries to a level that will attract and maintain good teachers."

"In my school (Sr High-as in many others) we all know that some of the worst teachers (If & when they teach) are the coaches - but they are the favored - and when a unit is lost, a good teacher with more seniority is the one to go, because coaching positions are pertected (sic) against transfere (sic)."

"It will never work. Masters degree requirement should not be one of the criteria! Graham is only pushing it to help him beat Paula Hawkins"

"I do not agree with the concept of merit pay for public education. The programs/plans developed in Florida were not carefully thought out before passed by Legislature -"

"I favor the concept of merit pay; however, I feel that no one has provided a fair and equitable way to award merit pay."

"development was done too hastily - merit pay in Florida is being promoted simply so that the legislature does not have to face up to its responsibility and fund the type of educational system they say Florida wants - it's a cop-out for adequately paying teachers and funding a top notch system"

"I think it is the worst idea to come to education since I've been teaching. Totally unfair, too costly to administer with too few rewards. We are saps to take it if offered."

"Excessively political. Too rapid."

WHAT DO YOU PREDICT TO BE THE FUTURE OF MERIT PAY HERE IN FLORIDA?

"Doomed to failure. It will finally be dropped after several years of revising and reimplementing. It has not worked elsewhere and it won't work here!"

"I predict merit pay programs will be changed by the legislature and local school boards annually until finally

they are abolished without ever fulfilling the goal of attracting & rewarding quality teachers."

"Good Question (How about Merit Pay, Evaluations, and testing for legislators by teachers of course also for administrators - only if evaluated by classroom teachers)"

"It will be implemented, but lack of funds & legal problems will cause its end in less than 5 yrs."

"'We will probably have to live with it for a few years.' I predict merit pay, in Florida, will fail - just as it has in other places because of difficulty in implementing and failure of adequate funding -"

"It won't last long"

"teachers are being blamed for all the wrongs of the educational system - yet are the ones who have little or no say in what happens - merit pay will only create more problems - it isn't going to keep teachers in - or encourage people to go into teaching - it's a slap in the face of every teacher in Florida - it's going to fail -"

"I have no idea but the legislators seem determined to make merit pay the panacea for the ills in the classroom. That is much too pat an answer. I hope we can kill it."

"Gradual disappearance"

APPENDIX 18

SUMMARY OF RESPONSES ON EVALUATION FACTORS

	Strongly Agree	Agree	Disagree	Strongly Disagree
(1) Teaching experience/ number of years teaching	34.6%	44.6%	12.4%	8.4%
(2) Master's degree	13.5%	22.4%	26.3%	37.8%
(3) Additional advanced degrees	9.4%	19.7%	28.6%	42.3%
(4) Standardized student test scores, by teacher	2.5%	11.0%	26.6%	59.9%
(5) Standardized student test scores, by school	1.9%	12.1%	26.4%	59.6%
(6) Standardized teacher test scores	4.7%	14.9%	25.4%	55.0%
(7) Inservice participation /points earned	13.1%	44.5%	23.7%	18.7%
(8) Additional areas of certification	7.7%	35.3%	35.2%	21.9%
(9) Professional involvement/committee representation	16.4%	46.4%	23.2%	14.1%
(10) Conducting workshops/ making presentations at county, state or national meetings	13.4%	32.9%	32.9%	20.8%
(11) Job-related extra- curricular duties	16.9%	39.1%	26.0%	17.9%
(12) Number of different preparations/grade levels	14.4%	32.6%	33.6%	19.4%
(13) Number of days absent	9.6%	28.7%	33.1%	28.6%
(14) Peer observations/ evaluations	15.3%	49.2%	17.0%	18.4%
(15) Administrator observations/ evaluations	17.8%	56.3%	15.6%	10.4%

APPENDIX 19

SUMMARY OF RESPONSES ON IMPLEMENTATION FACTORS

	Strongly Agree	Agree	Disagree	Strongly Disagree
(1) All teachers should receive more money before any teacher is rewarded.	84.1%	8.9%	3.5%	3.5%
(2) There should be some limit or quota on the number of teachers who may receive rewards.	6.4%	8.7%	24.3%	60.5%
(3) The program should be voluntary, and every teacher should be eligible to apply.	68.2%	23.0%	4.6%	4.1%
(4) The program should include all classroom teachers, counselors, media specialists, and resource teachers.	70.3%	18.5%	6.2%	5.1%
(5) Teachers who receive extra pay should not be expected to take on extra duties.	51.6%	25.2%	12.3%	11.0%
(6) Teachers should not be removed from the classroom as part of the program.	66.6%	26.6%	4.3%	2.5%
(7) Teachers in shortage areas (such as math and science) should be paid more.	4.9%	12.5%	31.0%	51.5%
(8) Teachers in alternative schools/programs should be paid more.	5.7%	18.7%	35.7%	39.8%
(9) The state should provide the funds for rewarding teachers without cutting back on general funds.	77.0%	19.9%	1.5%	1.5%

	Strongly Agree	Agree	Disagree	Strongly Disagree
(10) Adequate planning time (at least one year) should be evident before a plan is implemented.	75.0%	21.6%	1.9%	1.5%
(11) Programs for rewarding teachers should be developed at the district level.	31.1%	38.1%	17.5%	13.3%
(12) Teachers should be involved in planning the system of rewarding teachers.	76.7%	20.2%	0.9%	2.2%
(13) Business persons should be involved in planning the system of rewarding teachers.	7.6%	17.3%	30.9%	44.2%
(14) Legislators should be involved in planning the system of rewarding teachers.	4.9%	19.0%	31.7%	44.4%
(15) Teachers should be involved in implementing a system of rewarding teachers.	68.0%	26.4%	2.9%	2.6%
(16) Teachers should be involved in evaluating and revising a system of rewarding teachers.	68.0%	26.8%	2.5%	2.8%
(17) There should be an appeals process available to teachers.	59.6%	34.1%	3.4%	2.9%
(18) Those who perform the evaluations should receive special training.	71.6%	23.3%	3.6%	1.5%
(19) Funds should be made available for the training of evaluators.	57.8%	32.4%	5.0%	4.8%

	Strongly Agree	Agree	Disagree	Strongly Disagree
(20) There should be a committee of evaluators, rather than one administrator.	65.6%	26.7%	5.0%	2.8%
(21) A committee of evaluators should be primarily from within the teacher's district.	36.2%	39.5%	17.8%	6.6%
(22) A committee of evaluators should be primarily from the teacher's teaching field/service area.	56.0%	37.4%	5.4%	1.2%
(23) An evaluation instrument should stress performance on the job in the assigned area.	64.5%	33.2%	1.1%	1.2%
(24) All records of evaluations should be confidential.	70.1%	23.3%	2.9%	3.7%
(25) Each teacher should have access to his/her own records.	89.4%	9.5%	0.2%	0.9%

APPENDIX 20

COMBINED SUBGROUPS

	Original Analysis	Regrouped Analysis
District Size Hypothesis 1	Large Middle-sized Small	Large Other Other
Position Hypothesis 2	Building Representative Local and State Board Local Board Member Other Building Representative and Local Board Member State Board Member Teacher	Building Representative Boards of Directors Boards of Directors (Eliminated) Boards of Directors Boards of Directors (Eliminated)
Sex Hypothesis 3	Male Female	Data not Reanalyzed
Race Hypothesis 4	Black White	Data not Reanalyzed
Age Hypothesis 5	20 - 30 years old 31 - 40 years old 41 - 50 years old over 50 years old	20 - 40 years old 20 - 40 years old over 40 years old over 40 years old
Years Experience Hypothesis 6	1 - 5 years 6 - 10 years 11 - 15 years over 15 years	0 - 10 years 0 - 10 years over 10 years over 10 years
Highest Degree Hypothesis 7	None Associate Bachelor's Master's Specialist Doctorate	(Eliminated) Bachelor's Bachelor's Master's Doctorate Doctorate

	Original Analysis	Regrouped Analysis
Assignment Hypothesis 8	Elementary Support	Elementary
	Elementary	Elementary
	Secondary Support	Secondary
	Secondary	Secondary
	College	College
	Other	(Eliminated)
Secondary Assignment Hypothesis 9	Social Studies	Academic
	Language Arts	Academic
	Mathematics	Academic
	Science	Academic
	Combined Area	Academic
	Fine Arts	Other
	Guidance	Other
	Media	Other
	Other	Other
	Vocational	Other

APPENDIX 21

MERIT PAY EVALUATION FACTORS
WITH SIGNIFICANTLY DIFFERENT RESPONSES
BY MEMBERS WITHIN VARIOUS SUBGROUPS

	Original Analysis	Regrouped Analysis
District Size Hypothesis 1	13 (p=0.0238)	none
Position Hypothesis 2	none	3 (p=0.0239) 15 (p=0.0175)
Sex Hypothesis 3	2 (p=0.0446) 3 (p=0.0001) 6 (p=0.0004) 13 (p=0.0468) 15 (p=0.0002)	data not reanalyzed
Race Hypothesis 4	10 (p=0.0497)	data not reanalyzed
Age Hypothesis 5	1 (p=0.0006) 2 (p=0.0400) 11 (p=0.0387)	5 (p=0.0132)
Years of Experience Hypothesis 6	1 (p=0.0000) 7 (p=0.0143)	none
Highest Degree Hypothesis 7	none	2 (p=0.0) 3 (p=0.0000) 10 (p=0.0004)
Assignment Hypothesis 8	none	2 (p=0.0000) 3 (p=0.0000) 7 (p=0.0349) 9 (p=0.0213) 10 (p=0.0000) 11 (p=0.0023) 12 (p=0.0002) 15 (p=0.0327)
Secondary Assignment Hypothesis 9	none	none

APPENDIX 22

MERIT PAY IMPLEMENTATION FACTORS
WITH SIGNIFICANTLY DIFFERENT RESPONSES
BY MEMBERS WITHIN VARIOUS SUBGROUPS

	Original Analysis	Regrouped Analysis
District Size Hypothesis 1	none	2 (p=0.0003) 4 (p=0.0488) 19 (p=0.0145)
Position Hypothesis 2	none	21 (p=0.0145)
Sex Hypothesis 3	3 (p=0.0218) 7 (p=0.0020) 8 (p=0.0137) 11 (p=0.0435) 24 (p=0.0034)	data not reanalyzed
Race Hypothesis 4	none	data not reanalyzed
Age Hypothesis 5	5 (p=0.0232) 11 (p=0.0356)	1 (p=0.0158) 20 (p=0.0191)
Years of Experience Hypothesis 6	5 (p=0.0405)	none
Highest Degree Hypothesis 7	none	none
Assignment Hypothesis 8	none	none
Secondary Assignment Hypothesis 9	none	none

APPENDIX 23

CONCLUSIONS BY QUESTIONNAIRE ITEM
EVALUATION FACTORS

Evaluation Factor #1

Teaching experience/number of years teaching

A majority of respondents in this study seemed to agree with the traditional ideas expressed in many studies. Teaching experience should be used as a factor in determining merit pay recipients, according to 79.2% of respondents. However, there were 34.6% who strongly agreed and 44.6% who agreed. Only 8.4% of respondents strongly disagreed with this notion. It seems that teachers feel strongly that they should be paid for their teaching experience, but not as strongly for using experience for merit pay.

It was found that those respondents over 40 years old felt more strongly about this factor than younger respondents. Similarly, those with over 15 years of experience felt more strongly about the use of teaching experience to determine merit pay. Tradition among older and more experienced teachers appears to be an important factor in the responses to this item.

Evaluation Factor #2

Master's degree

Despite the prevalent use of master's degrees in providing teacher compensation, the respondents in this study strongly agreed only 13.5% of the time that a master's degree should be a factor in receiving merit pay.

There were, however, 37.8% who strongly disagreed with this factor. There appears to be no clear position on this evaluation factor.

Males felt more strongly than females that a master's degree should be used as an evaluation factor in a merit pay plan. Older teachers felt more strongly that a master's degree should be a factor in merit pay consideration, although the majority of respondents were opposed to the concept.

There was a significant difference among the "bachelor's degree," "master's degree," and "doctorate degree" groups on this evaluation factor. The majority of respondents in the "doctorate" group (76.1%) agreed or strongly agreed that the master's degree should be considered for merit pay purposes. Of "master's" respondents, 44.7% felt the same way. Only 16.0% from the "bachelor's" category looking favorably upon this requirement, while 44.7% of "master's" respondents agreed or strongly agreed with the factor. Similar results were found for respondents within the "college," "secondary," and "elementary" groups. While 76.2% of college respondents agreed or strongly agreed that a master's degree should be used as an evaluation factor in a merit pay program, only 30.7% of elementary respondents and 30.2% of secondary respondents felt the same way.

Although teachers have long seemed satisfied with the single salary schedule and its use of the master's degree in determining a pay level, it seems they feel strongly about not using the degree as an evaluation factor in a merit pay program. It also appears that those respondents who have earned higher degrees, or are responsible for advanced teacher training, have a strong interest in using the master's degree as a factor in merit pay determination.

Several comments were made stating that there are many good teachers with BA degrees. According to one respondent, "The idea that a Master's degree makes a master teacher is so inane that I would hope that those suggesting it wouldn't be the evaluating team." There were also suggestions that the degree should be in the teaching field.

Evaluation Factor #3

Additional Advanced Degrees

Similar background and results were discovered for this evaluation factor as with the previous one (Master's degree). Males felt more strongly than females that additional advanced degrees should be used in determining merit pay. There were more board members than building representatives who felt that "additional advanced degrees" should be used as a merit pay factor, although the total sample opposed this view.

Similar results were obtained for both "highest degree" and "assignment" categories, as with the "master's degree" evaluation factor. Responses within the "doctorate" and "college" groups were more in favor of using additional advanced degrees than the other subgroups within each category. It appears that people tend to value earned degrees more when they have completed the requirements for such degrees.

The comments made for this evaluation factor were similar to those for evaluation factor #2 (Master's degree). Some respondents felt that advanced degrees might be used as a factor in a merit pay program, but not as the base criteria: "Increased education should be a plus, but not an 'exclusion' from more pay for any 'good' teacher."

Evaluation Factor #4

Standardized Student Test Scores, by Teacher

Although the literature indicated some controversy involving the use of this factor, the members of FTP-NEA surveyed in this study seemed to agree with the opinions of their professional organizations. They were overwhelmingly opposed to the use of standardized test scores, by teacher, in determining meritorious teachers. There were no groups in this study whose responses were significantly different from other groups within the same category.

There were several suggestions that test scores do not indicate what a student has learned, and that test scores can be manipulated. One respondent felt that merit pay might be based on "Student achievement if and only if student scores could be regressed to compensate for ability, socio-economic status, and number of students in the classroom." Another idea was to use improvement in scores "based on pre/post tests."

Evaluation Factor #5

Standardized Student Test Scores, by School

Respondents in this study felt almost as strongly against this evaluation factor as they had against standardized student test scores, by teacher. It seems they strongly agreed with the attitudes encouraged by their state organization.

When groups within the "age" category were combined for analysis purposes, there was a difference between the responses of the "under 40 years old" and "over 40 years old" age groups. Those FTP-NEA members in the "over 40 years old" group felt more strongly against using this factor than the "under 40 years old" group.

Respondents showed their opposition to this evaluation factor in a similar manner to that of evaluation factor #4 (standardized student test scores, by teacher). The most

prevalent question involved the equality of facilities, if the scores were to be compared by schools.

Evaluation Factor #6

Standardized Teacher Test Scores

The FTP-NEA members surveyed in this study appeared to agree strongly with their national professional organization. Of the respondents, 80.4% disagreed or strongly disagreed with the use of standardized teacher test scores in determining merit pay. Females disagreed more often than males on the use of this evaluation factor.

One respondent who strongly agreed with the use of standardized teacher test scores noted the percentage of teachers who fail the basic skills portion of the Florida state teacher exam. Another comment gave a suggestion that teachers should pass a test based on the "in-house" curriculum.

Evaluation Factor #7

Inservice Participation/Points Earned

In this study, 57.6% of the respondents agreed or strongly agreed that "inservice participation/points earned" should be used as a factor in determining merit pay recipients. It appears that the majority of the FTP-NEA members surveyed held as valuable upgrading of skills through inservice participation.

There was a difference in opinions among respondents when "years of experience" was considered. Those FTP-NEA members with over 15 years of experience responded much higher (63.1%) in the "agree"/"strongly agree" responses than those in the other groups. It seems as if those respondents with more experience place a greater premium upon participation in staff development activities.

When the "assignment" category was collapsed to form "college," "secondary," and "elementary" groups, there was a difference among groups for this evaluation factor. College respondents felt most strongly about the use of "inservice participation/points earned," while secondary opinions were the lowest. One reason this may be the case is because college professors are often called upon to provide inservice training.

Some respondents felt that this might be a relevant factor, but only if the time of participation was averaged over three to five years, since some teachers do not participate as actively every year. One comment was that the inservice "would have to be clearly defined and qualified," while another respondent felt this factor could be considered if the inservice was "beneficial."

Evaluation Factor #8

Additional Areas of Certification

The respondents in this sample were somewhat split in their ideas on this factor, but 57.1% disagreed or strongly disagreed with the use of additional areas of certification in determining merit pay recipients.

When the data analysis was performed, there were no test results which showed significant differences in the opinions among the various subgroups examined.

A comment was made by one respondent on the significance of this evaluation factor. It was felt that additional areas of certification "may have no bearing on the job you actually do."

Evaluation Factor #9

Professional Involvement/Committee Representation

Respondents in this study tended to agree with the principles underlying the use of this factor. More than half of the FTP-NEA members surveyed (62.8%) agreed or strongly agreed that "professional involvement/committee representation" should be used as a factor in rewarding teachers with merit pay.

Respondents in the "college" group agreed or strongly agreed with this factor more often than those in the "elementary" or "secondary" groups. It might be that instructors at the college level are expected more often to

engage in this type of professional involvement, and hence place a greater value upon its use as an evaluation factor.

One respondent felt that the professional involvement "would have to be clearly defined and qualified." Another agreed with the use of this factor, but only if "participation does not affect in-class time."

Evaluation Factor #10

Conducting Workshops/Making Presentations at County, State, or National Meetings

Respondents in this study did not tend to agree with the plan Newton described which involved a variety of criteria for merit pay. Not quite half of the respondents (46.1%) agreed or strongly agreed that "conducting workshops/making presentations" should be an evaluation factor in a merit pay plan. Whites felt more strongly than blacks that this evaluation factor should be considered.

Respondents in the "doctorate" group felt more in favor of this factor than those in the "bachelor's" or "master's" groups. Similarly, college respondents answered "agree" or "strongly agree" with this factor almost twice as often as elementary or secondary teachers. These results might be true because teachers who have earned a doctorate, as well as those who are teaching at a college, are probably asked and/or expected to make such presentations more often than other teachers, and therefore

place a higher value on their use in determining merit pay awardees.

In some cases, it was felt, a teacher needs to be invited to make presentations, so not all teachers would have the opportunity. One respondent felt this might be an appropriate factor "where positive reactions have been created."

Evaluation Factor #11

Job-related Extra-curricular Duties

FTP-NEA members surveyed were about split on this evaluation factor, with a few more answering "agree" or "strongly agree" (56.0%). When the data was analyzed, those in the "31 to 40 years old" group showed a preference for use of this evaluation factor in determining merit pay recipients.

"College" respondents were more favorable toward the use of this factor than those FTP-NEA members in the "elementary" or "secondary" groups. As seen with previous factors, it appeared that college respondents feel more strongly about factors which are often a part of their usual situations.

One comment was made for this factor. The respondent felt that job-related extra-curricular duties might be used for merit pay purposes if the teacher is not already compensated for performing the duties.

Evaluation Factor #12

Number of Different Preparations/Grade Levels

As with "job-related extra-curricular duties" (evaluation factor #11), respondents were just about split on this factor. However, in this case FTP-NEA members disagreed or strongly disagreed slightly more often (53.0%).

The only differences among groups in responses on this item were found in the "assignment" category. Fewer elementary respondents agreed or strongly agreed with the use of "number of different preparations/grade levels" as an evaluation factor. Perhaps elementary teachers felt that their situations would not be considered as different preparations or grade levels.

If "number of different preparations" is not a requirement for merit pay, one respondent felt that it might be considered as one factor. Other comments included the observation that elementary teachers have different preparations all day, and questioned whether all elementary teachers would receive credit for this situation.

Evaluation Factor #13

Number of Days Absent

FTP-NEA members responding to this survey disagreed or strongly disagreed with this factor in 61.7% of the cases. Respondents in middle-sized and small districts preferred

this evaluation factor more often than those from large districts. Perhaps those in larger districts have more opportunities for staff development or meetings during school time, and do not feel they should be penalized for these days absent. Females were also found to be more in favor of the use of this evaluation factor than males.

One respondent felt that the number of days absent "would have to be clearly defined and qualified." The other comments dealt with the question of unexcused absences; most felt that this factor should be considered only if the absences are unexcused.

Conclusions and Recommendations - Evaluation Factor #14

Peer Observations/Evaluations

In this survey, many respondents felt that the use of fellow teachers as peer teachers might go one step further, with "peer observations/evaluations" being considered in a merit pay program. They answered "agree" or "strongly agree" 64.5% of the time. The data analysis gave no categories with significant differences among groups.

Some respondents pointed out that under collective bargaining, no teacher is allowed to evaluate another teacher. However, one teacher said, "I would agree if they were peers from around the state within an area of specialization. I would hate to see a friend evaluating me or me evaluating a friend."

Evaluation Factor #15

Administrator's Observations/Evaluations

Traditional evaluation procedures include observations/evaluations made by school-level administrators. Most of the surveyed FTP-NEA members answered "agree" or "strongly agree" to this potential merit pay factor (74.1%). It seems that the majority of respondents felt comfortable with this part of the present evaluation systems. Females felt more strongly than males on the use of this factor for merit pay.

The opinions of respondents in the "Building Representatives" group were more strongly in favor of "administrator observations/evaluations" than those of the "Board of Directors" group. Perhaps teachers are more satisfied with "administrator's observations/evaluations" than their organization leadership realizes.

A lower percentage of college respondents than elementary or secondary teachers wanted to use this as a factor in a merit pay plan. Again, it appears that public school teachers are more satisfied with "administrator's observations/evaluations" than their college counterparts.

There were several comments about the competence of the evaluating administrator. Teachers seemed to feel that this factor "really depends on whether you have a meritorious principal." Several respondents felt that many administrators would not give a valid evaluation.

APPENDIX 24

CONCLUSIONS BY QUESTIONNAIRE ITEMS
IMPLEMENTATION FACTORS

Implementation Factor #1

All teachers should receive more money
before any teacher is rewarded.

In this study, an overwhelming 93.0% of respondents agreed or strongly agreed with the notion that all teachers should receive more money before any teacher is rewarded. Those respondents in the "over 40 years old" group felt more strongly about the use of this factor than those in the "under 40 years old" group. Perhaps older teachers feel more strongly that they are not being compensated adequately for the time they have put into the profession.

Several FTP-NEA members commented that this was a very important evaluation factor. One respondent said, "I strongly oppose any attempt to impose merit pay until the profession serves all financially." Another felt that "Merit pay should not be considered without large increases in our present salaries first."

Implementation Factor #2

There should be some limit or quota on the number
of teachers who may receive rewards.

In this study, respondents agreed very strongly with their national professional organization that a merit pay plan should not include a quota system. Of the respondents, 84.8% disagreed or strongly disagreed with implementation factor #2. In the category of district

size, those FTP-NEA members in the large districts felt more strongly than those in the "other" group (middle-sized and small districts) that a quota or limit to recipients should not be a part of a merit pay plan.

Implementation Factor #3

The program should be voluntary, and every teacher should be eligible to apply.

The majority of respondents in this study (91.2%) agreed or strongly agreed that the program should be voluntary. Females felt more strongly than males in favor of this implementation factor, responding "agree" or "strongly agree" more often.

One respondent felt that every teacher should be eligible not only to apply, but to earn merit pay. Another commented: "Teacher should not be eligible for 3 years. This would encourage teachers to stay in one school system and make the program more stable."

Implementation Factor #4

The program should include all classroom teachers, counselors, media specialists, and resource teachers.

FTP-NEA members who responded to this survey felt strongly that this implementation factor is an important one. "Agree" or "strongly agree" responses were made by

88.8% of the members surveyed. Within the "district size" category, it was discovered that those respondents in the large districts felt more strongly that teachers in positions outside the classroom should be eligible to apply for merit pay.

The two comments on this implementation factor were from respondents who do not fit the standard "teacher" position. A psychologist stated that it was not fair because she does not "teach" regular classes. A counselor felt it was unfair to count years in counseling the same as years of teaching.

Implementation Factor #5

Teachers who receive extra pay should not be expected to take on extra duties.

Although some merit pay programs seem to require extra duties with the extra money, FTP-NEA members in this survey agreed or strongly agreed in 76.8% of the cases that teachers who receive extra pay should not be expected to take on these extra duties.

It appeared that those respondents in the "20 to 30 years old" group and the "41 to 50 years old" group felt more strongly than the others on this item. Also, those teachers with less than 10 years experience felt more strongly than the others that teachers should not be required to take on extra duties.

According to one respondent, the merit pay is to be given for "the job being evaluated." The only other comment on extra duties was, "like what?"

Implementation Factor #6

Teachers should not be removed from the classroom
as part of the program.

This study found that FTP-NEA members seemed to agree with their association's stand. Of the respondents, 83.2% answered "agree" or "strongly agree" to implementation factor #6, "teachers should not be removed from the classroom as part of the program." There were no categories of respondents whose Chi-square test results indicated significant differences among groups on this item.

One respondent felt it was "ironic to remove possible merit pay teachers from the classroom (especially children) to evaluate other!" Another felt that "They may volunteer for such, but not be dragooned into other work."

Implementation Factor #7

Teachers in shortage areas (such as math and
science) should be paid more.

As a group, only 17.4% of the FTP-NEA members surveyed answered "agree" or "strongly agree" that teachers in shortage areas should be paid more. The only category

showing a significant difference among groups was "sex." Females felt more strongly than males against this implementation factor.

There was only one relevant comment on this factor. According to one respondent, "in time, the relative wage differential would decline."

Implementation Factor #8

Teachers in alternative schools/programs
should be paid more.

The responses in this study were similar on this item to those of the previous factor. Only 24.4% of respondents agreed or strongly agreed that teaching in an alternative school/program should be a factor in determining merit pay recipients. As with the implementation factor which dealt with teachers in shortage areas, female members disagreed more strongly than males in response to this implementation factor.

Implementation Factor #9

The state should provide the funds for rewarding teachers
without cutting back on general funds.

FTP-NEA members surveyed in this study agreed overwhelmingly with these proposals. They felt very strongly (96.9% agreed or strongly agreed) that the state should provide the funds for a merit pay program with no

cutback in the general funds. There were no significant differences among respondents in any category on this implementation factor.

Implementation Factor #10

Adequate planning time (at least one year) should be evident before a plan is implemented.

In this study, 96.6% of respondents agreed or strongly agreed that adequate planning time should be evident before a plan is implementd. There were no groups showing significant differences among subgroups.

One respondent underlined the words "at least one year." Another FTP-NEA member felt that more time is necessary.

Implementation Factor #11

Programs for rewarding teachers should be developed at the district level.

The majority of FTP-NEA members responding to this questionnaire agreed or strongly agreed with the suggestions that a program for rewarding teachers should be developed at the district level. It was discovered that females felt more strongly than males, and those respondents in the "41 to 50 years old" group felt more strongly than the respondents in the other age groups on this implementation factor.

One respondent who strongly disagreed felt that the program should be developed at the state level to make it consistent. Another agreed with this idea and said "I think a statewide system is preferable to a small-county patch job."

Implementation Factor #12

Teachers should be involved in planning the system
of rewarding teachers.

The respondents in this study agreed overwhelmingly with the suggestions noted in the research. Over 96% agreed or strongly agreed that teachers should be involved in planning the system of rewarding teachers. Within the groups of teachers, there were no significantly different opinions among subgroups.

Implementation Factor #13

Business persons should be involved in planning the system
of rewarding teachers.

The respondents in this study did not seem to agree with the recommendations of some studies. Only 24.9% of FTP-NEA members surveyed agreed or strongly agreed that business persons should be involved in planning the system of rewarding teachers. There were no categories of respondents which showed significant differences among

subgroups. One respondent felt that business persons should be involved, but in business-related curricula.

Implementation Factor #14

Legislators should be involved in planning
the system of rewarding teachers.

In this study, respondents seemed to agree with the conclusion drawn in the Utah study. Only 23.9% of respondents agreed or strongly agreed that legislators should be involved in planning the system of rewarding teachers. There were no significant differences among subgroups of teachers for this implementation factor.

One respondent commented that "legislators are not under a 'merit' system." Another said she agreed that legislators should be involved in the program in part, because of the funding.

Implementation Factor #15

Teachers should be involved in implementing
a system of rewarding teachers.

The great majority of FTP-NEA members in this study felt that teachers should be involved in implementing a system of rewarding teachers. About 94% of respondents answered "agree" or "strongly agree" with this implementation factor.

There were no categories showing significant differences among groups. The one comment on this implementation factor was "'Teachers' should not be evaluating 'teachers' for merit."

Implementation Factor #16

Teachers should be involved in evaluating and revising a system of rewarding teachers.

In this study, 84.8% of respondents agreed or strongly agreed that teachers should be involved in evaluating and revising a system of rewarding teachers. There were no significant differences among subgroups for any of the groups examined in this study.

Implementation Factor #17

There should be an appeals process available to teachers.

The great majority of respondents in this study (93.7%) agreed or strongly agreed with the stance of their professional organization that there should be an appeals process available to teachers. There were no categories in the data analysis which produced significant differences among groups of respondents. A comment on this implementation factor was that an appeals process should be available "only for specified reason."

Implementation Factor #18

Those who perform the evaluations should receive
special training.

Almost three-fourths of the respondents in this survey (71.6%) strongly agreed that those who perform the evaluations should receive special training, while 23.3% agreed with this factor. There were no significant differences in the opinions of members among the various subgroups in this study. One respondent commented that the "State Department of Edu. Professional Practices Comm. are already trained."

Implementation Factor #19

Funds should be made available for the
training of evaluators.

In this study, the majority (90.2%) of the participants agreed or strongly agreed with the recommendation of the Florida School Boards Association that funds should be made available for training evaluators. Those respondents from large districts felt more strongly than those from the "other" group (middle-sized and small districts) that funds should be made available for the training of evaluators.

Implementation Factor #20

There should be a committee of evaluators,
rather than one administrator.

In 92.3% of the cases in this study, respondents agreed or strongly agreed that there should be a committee of evaluators, rather than one administrator. Those respondents over 40 years old felt more strongly than those under 40 that there should be a committee of evaluators.

One respondent commented that a committee of evaluators would be a "boondoggle." Another stated that "evaluators should be several teams who travel around the state doing evaluations. This would insure consistent measure of comparing evaluations."

Implementation Factor #21

A committee of evaluators should be primarily from
within the teacher's district.

Respondents in this study agreed or strongly agreed with this factor in 75.7% of the cases. However, they were just about split on intensity of feelings (36.2% strongly agreed, 39.5% agreed). Those respondents in the "Building Representative" group felt more strongly than the "Board Members" that a committee of evaluators should be primarily from within the teacher's district.

One respondent commented: "Must be outsiders - no favoritism, in group, or 'Brown Nose' effect present to

sway evaluation." Another also felt that "people from another county should evaluate to avoid 'political' choices."

Implementation Factor #22

A committee of evaluators should be primarily from the teacher's teaching field/service area.

Within this study, 93.4% of respondents agreed or strongly agreed that a committee of evaluators should be primarily from the teacher's teaching field/service area. There were no significant differences among groups within any of the categories of respondents examined.

One respondent felt that the committee "should include people familiar with the technical content of the teacher's work, or course." Another commented that "there should not be a committee. The principal is fine for this job." According to one respondent, evaluators from the teacher's teaching field should be "included, but not 'primarily'."

Implementation Factor #23

An evaluation instrument should stress performance on the job in the assigned area.

An overwhelming 97.7% of respondents in this study agreed or strongly agreed that an evaluation instrument should stress performance on the job in the assigned area.

There were no significant differences among any subgroups of respondents.

One respondent starred this item and wrote "very important." Another elaborated by saying, "This should be the primary focus of merit pay; It all has to do with competence on the job."

Implementation Factor #24

All records of evaluations should be confidential.

Females agreed with this implementation factor more strongly than males. However, 93.4% of all respondents agreed or strongly agreed that all records of evaluations should be confidential.

A question was asked on this implementation factor: "confidential to everyone including the teacher?" Another respondent commented: "All teacher records, good and bad, should be seen only on a 'need-to-know' basis by individuals in the appropriate administrative hierarchy."

Implementation Factor #25

Each teacher should have access to his/her own records.

Respondents in this survey were in agreement with this view of their teacher organizations. They felt more strongly in favor of this implementation factor than any other, with 98.9% agreeing or strongly agreeing.

There were no subgroups which produced valid, significant Chi-square test results.

This item was starred and noted "very important" by one respondent. Another commented that the records should be available "immediately."

APPENDIX 25

SAMPLE COMMENTS

"Should be on job performance and not scores education, committees etc"

"The best teachers are not necessarily those with higher degrees. But "older" teachers have taught years on low salary rate and perhaps could stand the encouragement of 'extra' pay."

"Extra pay doesn't make a good teacher. Good teachers are good anyway. But all teachers need encouragement financially, and therefore I disagree with merit pay, however it is implemented! These are very good questions on the subject!"

"How much money is being used to implement program? Does this exceed benefits to teachers?"

"I see no way that merit pay can be implemented in the school system in a fair and unbiased manner."

"I would rather see each teacher receive more supply money for good equipment, computers etc. than for this"

"I think implementation of merit pay will divide teachers more than necessary. Reward ALL teachers."

"The bottom line is "Are students achieving the objectives of the program. The criterion used should be as objective as possible in determining the effectiveness of instruction."

"Use merit pay monies to raise salaries - Retrain or otherwise discipline poor teachers"

"I am opposed to merit pay because there are too many variables in the teaching process that are unmeasurable. salaries of all teachers need to be raised. my husand and I, both teachers, have used all our savings and faced 10 yr. loans to give our children college educations."

"Observation system should be improved before use for merit pay. Observer bias permeates the current (new) influence measure. Other observation systems are more appropriate (ie. Robert Soar, UF/Coker, Un of Ga."

"Progress of student's test scores (maintain or excell in subject areas), activities in classroom, continuation of education of teacher, and peer observations should be included. Participation, activities, and peer evaluations for teaching resource people should be observed."

"Surveys of educators, administrators, parents, and legislators should be studied first. Other professions should be observed to see how they work."

"I am totally against merit pay. These factors do play a part in the excellence of a program, but one could meet many of these criteria and not reach the children. On the other hand, one could meet a few & do an excellent job. Just as a child may be able to identify letters & and call words & make the proper sounds in reading & and still not know what he has read, a teacher may be able to jump through all the merit pay hoops & still not meet the needs of children. So many factors enter into a teacher's performance: composition of the class, parent support, administrative support, etc. A person can have horrible years & excellent years. The very idea of merit pay is an insult to professionals."

"I'm so against merit pay that it's difficult to be objective. It's a hoax & can cause only disruption, confusion, & hard feelings. I feel that everyone should be paid a decent salary. Instead of having merit pay for those who meet specific criteria, I think that those not doing an adequate job should choose a team of peer advisors. If, with this help of peers, the person does not

improve, the person should be removed from that position. In that way, the teacher would know that help had been offered and the public would eventually be more satisfied with the teaching staff & and the educational program. If the help offered is accepted, a teacher would be kept instead of lost."

"I hope someone in 'charge' listens."

"Figure out what you're doing and let us know! We can't play the game if we don't know the rules!"

"It will be difficult to arrive at a totally fair merit pay plan because of the political aspects. Those who are most deserving will not always be the ones who are rewarded."

APPENDIX 26

EVALUATION FACTORS RANKED BY TOTAL PERCENTAGE OF
"AGREE" AND "STRONGLY AGREE" RESPONSES

- **79.2% Teaching experience/number of years teaching
 - **74.1% Administrator observations/evaluations
 - *64.5% Peer observations/evaluations
 - *57.6% Inservice participation/points earned
 - *56.0% Job-related extra-curricular duties
 - *52.8% Professional involvement/committee representation
 - 47.0% Number of different preparations/grade levels
 - 46.3% Conducting workshops/making presentations at county, state or national meetings
 - 43.0% Additional areas of certification
 - 38.3% Number of days absent
 - 35.9% Master's degree
 - 29.1% Additional advanced degrees
 - 19.6% Standardized teacher test scores
 - 14.0% Standardized student test scores, by school
 - 13.5% Standardized student test scores, by teacher
- ** These items should be used as evaluation factors in a merit pay plan.
- * These items should be considered, but not as major evaluation factors in a merit pay plan.
- The other items listed should not be used as evaluation factors in a merit pay plan.

APPENDIX 27

IMPLEMENTATION FACTORS RANKED BY TOTAL PERCENTAGE OF
"AGREE" AND "STRONGLY AGREE" RESPONSES

- **98.9% Each teacher should have access to his/her own records.
- **97.7% An evaluation instrument should stress performance on the job in the assigned area.
- **96.9% The state should provide the funds for rewarding teachers without cutting back on general funds.
- **96.9% Teachers should be involved in planning the system of rewarding teachers.
- **96.6% Adequate planning time (at least one year) should be evident before a plan is implemented.
- **94.9% Those who perform the evaluations should receive special training.
- **94.8% Teachers should be involved in evaluating and revising a system of rewarding teachers.
- **94.4% Teachers should be involved in implementing a system of rewarding teachers.
- **93.7% There should be an appeals process available to teachers.
- **93.4% A committee of evaluators should be primarily from the teacher's teaching field/subject area.
- **93.4% All records of evaluation should be confidential.
- **93.2% Teachers should not be removed from the classroom as part of the program.
- **93.0% All teachers should receive more money before any teacher is rewarded.
- **92.3% There should be a committee of evaluators, rather than one administrator.
- **91.2% The program should be voluntary, and every teacher should be eligible to apply.
- **90.2% Funds should be made available for the training of evaluators.
- **88.8% The program should include all classroom teachers, counselors, media specialists, and resource teachers.
- **76.8% Teachers who receive extra pay should not be expected to take on extra duties.
- **75.7% A committee of evaluators should be primarily from within the teacher's district.
- **69.2% Programs for rewarding teachers should be developed at the district level.

- 24.9% Business persons should be involved in planning the system of rewarding teachers.
- 24.4% Teachers in alternative schools/programs should be paid more.
- 24.2% Teachers in shortage areas (such as math and science) should be paid more.
- 23.9% Legislators should be involved in planning the system of rewarding teachers.
- 15.1% There should be some limit or quota on the number of teachers who may receive rewards.

** These items should be considered when a merit pay plan is implemented.

The other items should not be considered when a merit pay plan is implemented.

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