ECONorthwest is a Portland, Oregon–based economics consulting firm experienced in supporting public and private nonprofit education partners through rigorous program evaluation, data analysis, and high-level consultation in education finance and policy.

The Chalkboard Project is an independent education transformation organization dedicated to making Oregon’s K–12 public schools among the best in the country. We are funded by a consortium of Oregon’s leading philanthropic foundations that share a central belief that research and on-the-ground expert knowledge is essential to identifying policies and practices that improve outcomes for students.

Education Northwest works to transform teaching and learning in the Pacific Northwest and across the nation. Our services to states, districts, schools, community-based organizations, and foundations include rigorous research and evaluation; research-based technical assistance; widely acclaimed professional development; and strategic communications that maximize impact.
In 2010, five Oregon districts embarked on a journey that has the potential to transform public education across the state. A federal Teacher Incentive Fund (TIF) grant administered by the Chalkboard Project enabled these districts to collaboratively design teacher and principal evaluation and compensation systems that reward leadership, innovation, and student learning and growth.

The TIF program is based on a large body of research that identifies teachers as the single most important factor in increasing student achievement. This research led many educators and policymakers to call for a more meaningful teacher evaluation system—one that links performance to student outcomes and delivers professional development that meets each teacher’s needs.

The five Oregon TIF districts have worked hard to meet this call. In the past three years they have discovered how to leverage high-quality evaluations and continuous professional learning. TIF districts have demonstrated progress in improving student achievement, including a 5 percentage point composite (i.e., across all grade levels) gain in math and reading proficiency since the 2010–11 school year. During the same period, the state saw an average decline of 1 percentage point in math proficiency and an increase of only 3 percentage points in reading. TIF schools produced even stronger gains among economically disadvantaged students, who increased their math proficiency by 6 percentage points and their reading by 8 points since 2010–11. In contrast, disadvantaged students in non-TIF districts saw their math proficiency decline by 1 percentage point and reading proficiency improve by only 3 points.

Over the past three years, federal funding from the TIF grant enabled the five districts (Greater Albany Public Schools, Bend–LaPine School District, Crook County School District, Redmond School District, and Salem–Keizer School District) to:

- Develop new teacher and principal evaluation systems
- Train principals to be objective and consistent evaluators
- Target professional development to individual needs
- Introduce financial incentives for outstanding performance in classroom practices and student learning and growth at the school level
- Measure impact on teacher performance and student learning and growth

The insights gained from their journeys can light the path for districts embarking on educator evaluation reform. The urgency to understand the implications of educator evaluation is underscored by Senate Bill 290, which requires all districts to implement evaluation systems that measure educators’ influence on student learning and growth by the 2013–14 school year.³

This brief demonstrates the progress TIF districts made in changing perceptions about educator evaluation and the effect reform has had on improving instruction. It also highlights what it takes to bring about change that directly affects educators. It includes recommendations from districts about required components of the TIF grant, including how to develop educator evaluation systems, align professional development to individual needs, design incentives for performance, and communicate new policies to all stakeholders. The lessons offer valuable insights that can help guide Elementary and Secondary Education Act (ESEA) waiver districts in Oregon as they embark on the redesign of their own educator evaluation systems.
Lessons Learned From Oregon Teacher Incentive Fund Districts

Getting started

To fulfill the requirements of the TIF grant, district design teams were given eight months to review research, design programs, and deliver initial training by June 2011. TIF districts received ongoing coaching from Chalkboard to support district leaders and design team members who were engaged in teacher-led planning and implementation. Districts fully implemented their new evaluation and professional development systems the following school year, 2011–12. Despite expedited schedules, the five districts met launch objectives and are now in the third year of implementation.

Winning teacher support

Teacher-led change is accomplished only to the extent teachers own it. Initially, skepticism about TIF was high. In three years, however, districts saw a positive shift in attitudes. A growing percentage of teachers and principals agree that participating in TIF contributed to school improvement and to better teaching in their schools. And, the data back up their belief.

Figure 1. Percentage of respondents who agree TIF has improved teaching and schools by implementing new evaluation systems

Within the broader context of school improvement and reform, composite math and reading proficiency rates as measured by the Oregon Assessment of Knowledge and Skills (OAKS) increased 5 percentage points from the 2011–12 to the 2012–13 school year in TIF schools. Moreover, TIF schools made gains in math and reading value-added scores. Sixty-five percent of TIF schools had value-added scores above the state median in 2012–13, a 16 percentage point gain from the 2010–11 school year (Figure 2). In addition, 60 percent of TIF schools increased their math value-added scores more than 10 percentage points and 45 percent of schools similarly improved in reading between 2010–11 and 2012–13. This includes already high-performing schools that continue to score in the top of the range, but have difficulty maintaining large percentage-point gains (Figure 3).

Figure 2. Percentage of TIF schools with value-added scores above the state median

Figure 3. Percentage of TIF schools that improved value-added scores by more than 10 percentage points between 2010–11 and 2012–13

We have become united, where everyone is looking at their practice.

—Union Representative
Lessons Learned From Oregon Teacher Incentive Fund Districts

The crux: classroom observations

Research suggests that effective teaching in the classroom is the single greatest contributor to student achievement. But, how does a district help teachers grow? And, how should it assess performance in the classroom? An early task for TIF districts was to develop robust, observation-based teacher evaluation systems. When using evaluation results to support professional development and inform teachers’ career decisions, it is critical to have high-quality observations and reliable scoring.

In the beginning, fewer than half of teachers agreed that their evaluator could conduct quality and reliable observations. By 2013, the share of teachers who agreed their evaluator could conduct high-quality observations increased by 11 percentage points and the share of teachers who agreed they would receive the same evaluation score regardless of who conducted their observation increased by 15 percentage points.

Figure 4. Percentage of teachers who agree that their evaluator conducts high-quality observations and that scoring is consistent across evaluators

While TIF districts still have room to grow, they recommend several strategies that helped them gain ground in bringing reliability and credibility to evaluation:

- **Common language.** Principals built a common language for evaluating teachers through Teachscape® interrater reliability training. The training included video-based scoring practice and an assessment to test accuracy in scoring evidence of teaching practice. All evaluators in all TIF districts were required to pass the assessment.

- **Multiple evaluators.** The models design by TIF districts call for teachers to be observed multiple times throughout the school year. Some TIF schools had a second trained administrator observe teachers. While administrators were challenged to find time to observe more teachers, they benefited from conferencing with another evaluator when determining summative rankings. Teachers also benefited from having a second opinion of their performance because each evaluator brought a different style for giving feedback.

- **Timing and frequency.** Principals observed all teachers earlier in the year and more often (up to six times) than they had prior to TIF implementation. Teachers said they appreciated the increased frequency of observations and the improved quality of pre- and postobservation conferences. In addition, principals conducted unscheduled observations that allowed them to see authentic teaching moments and hold teachers accountable for what they were teaching.

Customizing professional development

One the biggest challenges to implementing teacher evaluation reform is linking professional development to an individual’s needs. Not only do administrators and districts frequently lack the data to identify individual needs for professional development, they also lack the time to deliver training and follow up on implementation.

With observations and feedback throughout the year, it’s a growth and learning model, not a “gotcha” system. If I’m not understanding a particular aspect of teaching, this gives me the chance for a discussion to happen while change can be made instead of waiting until the end of the year.

–Teacher
TIF districts recommend several ways to overcome these obstacles:

• **Technology investment.** Some districts purchased software (e.g., TalentEd Perform®) to capture evaluation results, suggest professional development based on evaluation scores, and produce reports to identify common needs within schools and across the district. Technology solutions allow administrators to document and track specific needs, rather than rely on word of mouth about individuals and their goals.

• **Educator autonomy.** In some TIF districts, educators were encouraged to pursue training that met their needs. Principals and teachers agreed on a professional development plan that addressed unique goals. For example, they were excused from traditional schoolwide professional development, and allowed to do their own professional development in an area related to a course they were teaching.

• **Differentiation.** By improving the ability of evaluators and evaluation tools to distinguish different levels of performance, principals anticipate that over time they will be able to see schoolwide trends about strengths and weaknesses and prepare appropriate individual and whole-group professional development.

### Determining if performance pay creates incentive to improve instruction

Early indicators suggested teachers and administrators believed performance pay would not motivate changes in the classroom. However, all TIF districts were required to award bonuses for top performance. This federal requirement does not apply to ESEA waiver districts.

Once TIF district design teams completed models for professional development and teacher evaluation, they devised three ways to reward teachers with added compensation. One was a straightforward salary bonus for teachers who took on instructional leadership roles. The second was based on an individual performance evaluation. The third was an incentive awarded to all teachers in TIF schools that met schoolwide performance targets according to a value-added scoring method based on OAKS.

While few late-career educators consider performance pay a motivator, evidence suggests it may be a tool to recruit and retain high-performing teachers who are new to the profession. Almost twice as many early career teachers agree that performance pay motivates them to improve their practice, as compared to their colleagues with five or more years of experience (45 to 26 percent, respectively). Agreement is highest among novice teachers (53 percent).
Demonstrating growth on OAKS scores, as measured by a school’s value-added scores, is one way that teachers and principals can earn performance pay. Value-added scoring takes into account factors beyond a teacher’s or school’s control—such as students’ academic history and demographic characteristics—to better isolate the effect of what happens in the classroom. Because it was important for teachers to understand the rationale and the complexity of value-added scores, TIF districts offered training to help everyone know how value-added models work and to dispel fears about how they are used.

District communication efforts have also paid off. Growing percentages of teachers and principals are able to interpret information from a value-added model, and they agree that value-added scores are a valid way to award performance pay.

For districts contemplating a performance pay system, TIF districts recommend:

- **Alignment with district philosophies.** Ideally, performance pay systems align with existing, stated district philosophies. Some districts take the position that everyone plays an important part in raising student achievement, including classified staff members who—due to federal grant requirements—were ineligible for TIF bonuses. Others questioned the fairness of distributing schoolwide awards based largely on student growth on OAKS.

- **Objective teacher evaluations.** Before introducing performance pay, systems should be in place to ensure teachers receive objective and reliable observations. These include calibration training for evaluators, and policies for providing evidence to rate teachers on aspects of the teacher rubric that were not observed.

- **Primary focus on improving student outcomes.** Above all, performance pay systems should incentivize positive student outcomes without negatively impacting students’ opportunities to advance. For example, some secondary schools debated whether students should take high school exit exams in later grades when they could demonstrate more learning growth. However, this would limit the number of chances students have to pass the exam. Basing evaluation scores on multiple measures of student growth can mitigate the drawbacks of any single measure while more meaningfully describing student progress.4

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Change is difficult. The evaluation system is something new at a time when there is a lot of change in education. [Educators are] afraid of what might happen.
Successful strategies for communicating new educator evaluation policies

Communication is an essential part of implementing new evaluation and compensation systems. District design teams faced two major challenges. First, they knew they would have to convey new policies and tools that would be changed and improved within a few months, based on feedback from teachers and principals. Second, they recognized the formidable barriers to changing a culture where:

- Infrequent, planned observations rarely held consequence
- Evaluation scores lacked connections to student learning and growth
- Uniform, school- or district-led professional development was based on assumptions, not evidence of educators’ needs

Figure 8. Percentage of respondents who agree that their TIF design team clearly communicates messages

Design team members recommend a multipronged approach to cope with these challenges:

- **Face-to-face delivery.** In-person meetings improve understanding by allowing for clarification and feedback in real time. They build camaraderie. Ideally, district administrators, principals, and union representatives present new information together. Providing scripts or facilitation guides to presenters helps ensure consistent messaging across school buildings and district offices.

- **Multiple alternative methods.** Not everyone will be available to attend presentations. TIF districts used a variety of communication methods, including posting videos on teacher dashboards, creating dedicated web pages, distributing FAQ sheets, and designating a hotline number or email address for questions. Clearly stated processes for providing feedback to the design team helped establish a useful feedback loop.

- **Appointed roles.** Most TIF districts trained key communicators to deliver consistent and accurate messages inside schools. Not only could they answer questions promptly, they relayed educator feedback to the design team to inform future program improvements.

Other lessons from the field

Oregon’s five TIF districts have celebrated the successes and combated the challenges of educator evaluation reform for three years. They recommend that districts embarking on the process focus mightily on:

- **Inclusivity.** Involve all employee groups in an educator evaluation system design team built on collaboration, respect, and shared decisionmaking. Be deliberate about including union leaders, teachers, specialists, leaders from each level (elementary, middle, and high), and representatives from multiple areas of content expertise. Clearly assign roles and responsibilities.
Lessons Learned From Oregon Teacher Incentive Fund Districts

• **Communication.** Prioritize developing a good communication system. Specify how you will convey consistent messages and how you will gather and address feedback.

• **Rigorous training.** All educators need training on each aspect of new evaluation, professional development, and compensation systems. Evaluators, too, need training to conduct high-quality and reliable observations. A handbook isn’t enough, nor is a single seminar at the beginning of the school year. Ongoing support, regular checks for understanding, and a clear process for teachers and principals to ask questions produce the best results for effective implementation of new systems.

• **Perseverance.** Finally, don’t give up. As one design team member sums up, “When the going gets tough, take a breather, but come back.”

**Looking ahead**

The learning isn’t over. New lessons will emerge as the grant continues through the end of the 2014–15 school year, while results to date offer encouragement to districts contemplating changes in their models for professional development, evaluation, and compensation.

**Footnotes:**


**Data collection:**

Education Northwest (EdNW) collected data used in this brief as part of the local evaluation of the TIF grant. EdNW administered surveys to certified staff and principals in participating schools and districts. In 2011, 61% of certified staff and 75% of principals responded to the survey. The survey was readministered in 2012 (not shown in this report) and 2013, with 59% of certified staff and 76% of principals responding. EdNW also conducted interviews and focus groups with certified staff, administrators, design team members, TIF coordinators, and union representatives from each district.

**Figure notes:**

Figures 1–5 and 7–8: Sample includes 777 certified teachers and 51 principals.

Figure 6: Sample includes 777 certified teachers: 101 with 0–4 years of experience and 676 with 5 or more years of experience.