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with David Childress and Ieva Raudonytė

Teacher career reforms: Learning from experience

Management of teachers

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Abbreviations

COPALE	Consejo Participativo Local de Educación (participatory local education council, Peru)
CPD	continuous professional development
CT	chartered teacher (Scotland)
DoE	Department of Education (New York City)
DRE	Dirección Regional de Educación (Regional Education Board – Peru)
EEA	Employment of Educators Act (South Africa)
EFA	Education for All
ESDP	education sector development programme (Ethiopia)
FECODE	Federación Colombiana de Trabajadores de la Educación (main teacher union in Colombia)
IIEP	UNESCO International Institute for Educational Planning
INEE	Instituto Nacional para la Evaluación de la Educación (National Institute for the Evaluation of Education – Mexico)
INEVAL	Educational Evaluation National Institute (Ecuador)
IQMS	Integrated Quality Management System (South Africa)
LCPM	Ley de la Carrera Pública Magisterial (Public Teaching Career Law – Peru, 2007)
LOEI	Organic Law of Intercultural Education (Ecuador)
LP	Ley del Profesorado (Teacher Law – Peru, 1984)
LRM	La Ley de Reforma Magisterial (Teacher Reform Law – Peru, 2012)
MoE	ministry of education
OECD	Organisation for Economic Co-operation and Development
OREALC	Oficina Regional de Educación para América Latina y el Caribe
PAM	Personal Administrative Measures (South Africa)
PBR	payment by results
PCT	Peer Collaborative Teacher (New York City)

SGB	school governing board
TCP	Teacher Career Pathways (New York City)
TCT	Teacher Council of Thailand
TEPC	Teacher Civil Service and Educational Personnel Commission (Thailand)
TL	Teacher Leader (New York City)
TTL	Teacher Team Leader (New York City)
UFT	United Federation of Teachers (New York City)
UGEL	Unidad de Gestión Local (Education Management Unit – Peru)
USA	United States of America

Acknowledgements

Executive summary

A major question for governments is how to transform teaching into an attractive career choice for today's youth. Countries all over the world are also grappling with the related challenges of poor working conditions and dwindling retention rates. In this context, teacher career reforms have been identified as a potentially powerful lever. Many governments are looking for ways to diversify teacher career structures and to widen career advancement opportunities in order to attract and retain high-performing teachers. Appropriate policies and the management of teacher careers are critical to achieving quality teaching and learning and to addressing teacher scarcity.

A close examination of the organization and management of teacher careers can provide useful insights into making a teaching career more appealing. A number of countries have reformed their teacher career structures over the past decades, and others intend to introduce changes in the near future. To benefit from the experience of school systems that have already implemented such reforms, we looked into the organization and management of teacher careers in Colombia, Ecuador, Ethiopia, Lithuania, Mexico, New York City, Peru, Scotland, South Africa, and Thailand. This report summarizes our findings and addresses the following research questions:

- What options exist in terms of the organization and management of teacher careers? How are teacher careers structured and promotion methods organized?
- What are the perceived effects of teacher career reforms on teacher motivation, attraction, and retention?
- What are the management implications and implementation challenges of teacher career reforms?

This research distinguishes the different teacher career models in use, the pitfalls to avoid in terms of design options, and numerous implementation challenges to be prepared for when considering teacher career reforms.

In recent decades, there have been important developments in the approach to teacher careers, with distinctions made between first- and second-generation teacher career models (UNESCO, 2015*a*). First-

generation structures promote teachers based on seniority and experience, as exemplified by the single salary schedule model. In contrast, second-generation structures offer performance-based incentives, so teachers do not all progress through the salary scale at the same speed. These incentives can include systems of bonus pay, which give teachers a one-off payment for achieving specific objectives, or salary progression contingent upon appraisal, which raises a teacher's base pay permanently after successfully completing one or more appraisals. An alternative second-generation structure is the career ladder, in which teachers take on a new status or role after meeting the required standards to do so, with their pay reflecting the new position. This model was identified as the one with the most potential for bringing about autonomous motivation. To be included in this research project, the reformed career structure had to include a career ladder that sought to diversify the professional course of teachers and to widen advancement opportunities.

Promising career schemes are expected to motivate teachers 'from the inside'. Looking at proxy indicators of teacher autonomous motivation, this research finds that, overall, teachers very positively welcome having more opportunities for career progression while still being able to stay in the classroom. Beyond agency over their professional mobility, teachers appear to be motivated by systems where their voices are heard and where they feel considered and valued as autonomous professionals. Having spaces and opportunities to collaborate with peers is equally a key driver of teacher motivation. Our research shows that collaboration is not automatically fostered by emerging career schemes, but must be clearly formalized through the career structure, for instance by giving experienced teachers the authority and extra time to support their peers. It is all the more important to encourage teacher collaboration, because it is a powerful means for professional development and knowledge sharing within schools. In the school systems studied, teachers also greatly appreciate a stronger focus on continuous professional development, either through the introduction of mentoring and coaching positions within schools, or through completing new requirements for career progression and professional development programmes.

Our research found that the effects of the career schemes on the attractiveness of the teaching profession appear limited. However, we also found a rather positive influence on teacher retention. Having more horizontal promotion opportunities contributes to teachers' willingness to stay in the profession. It also helps keep the best teachers in the classroom.

In line with motivation theories, we found that career structures are unlikely to have positive effects on the teaching profession if basic conditions are not already being met. In countries where salaries are not aligned with those of comparable professions, and working conditions are poor, the career structure is simply not teachers' main concern. This suggests that in order to strengthen teacher motivation, it is crucial to consider basic extrinsic factors before tackling intrinsic motivators.

Several lessons emerged when considering the design of second-generation career structures. The number of distinct positions in a career ladder should demonstrate a clear differentiation in roles and responsibilities and show a natural progression correlated to increased teacher experience and professional development. Designing logical, coherent levels into a new teacher career model seems like common sense advice to any policy planner. Nevertheless, this process does not always prove as straightforward as it seems. Planners should fully consider the desired differentiation between teachers at distinct levels of the career structure, and develop a clear system that can fully define the roles and responsibilities of each stage. Further, planners should design systems that provide the support and training opportunities teachers need to excel in their newly defined roles. While a successful professional development programme can provide great support and benefit to teachers, a poorly designed or untenable one can merely increase their frustration.

Well-designed reforms can also have a positive impact on regulating entry into the teaching profession, as well as providing essential support to new educators. In some of the countries studied, the reform introduced major changes to entry requirements and selection procedures, with the aim of introducing a more meritocratic and transparent process. Examples of this included increasing qualification requirements and moving from a selection system dominated by nepotism to fair and competitive entry examinations. Thanks to the greater selectivity of candidates for the profession, these new requirements helped improve the calibre of the professionals recruited. Beyond the selection process, it is important to consider teachers' early years in the profession. Well-organized and supportive induction and probation periods, along with mentorship programmes, play a major role in professionalizing and retaining young teachers.

When designing evaluation criteria for salary increases or promotion, policy-makers must carefully define clear markers with an appropriate

level of difficulty according to teachers' roles and responsibilities at the different stages of the career structure. Our research shows that the criteria must be stringent enough to confirm teachers' expectations of the value of moving to a higher position or salary level, yet also attainable so as not to discourage teachers from seeking professional advancement. Consideration must also be given to the number of teachers who will be promoted in each cycle of assessment. Utilizing a norm-referenced system (only top performers are promoted) is more likely to lead to decreased collaboration between teachers and a limited sense of self-determination, whereas criterion-referenced systems (all applicants who meet the criteria are promoted) may encourage responsibility and autonomy without damaging interpersonal relationships. However, policy designers must weigh the benefits of a criterion-referenced system carefully against the financial stability that a norm-referenced system can bring.

Implementing teacher career reforms is no less substantial an undertaking than the design process, and needs to be planned and executed carefully. Our research has shown that in the majority of countries and jurisdictions analysed, resource constraints were the major obstacle to the successful implementation of teacher career reforms. Although this research did not undertake cost estimates of the reforms, it has demonstrated that the introduction of more sophisticated career structures requires careful forward planning in terms of teacher numbers and salary implications. In addition, second-generation career structures involve the use of performance evaluation systems that can impose significant costs on education systems. Adequate cost calculations and budget provisions prior to implementation are therefore essential for a smooth reform process. In addition to merely needing increased funding, second-generation teacher career reforms also need strong human and technical resources to ensure success at the implementation stage. This research has specifically highlighted the issue of the ability of staff to implement sophisticated evaluation systems in second-generation reforms.

Depending on the extent and nature of the career reforms, the transition from the old system to the new can become one of the most complex and contentious parts of implementation. When implementing the reform, ministries of education have three main options for the transition to the new career structure: (1) the new status is imposed on all teachers from the early stages of reform implementation (big-bang approach); (2) the reforms only apply to new teachers entering the profession (grandfathering); or (3) teachers voluntarily 'opt in' to the new career

structure before it becomes mandatory for all teachers after a few years of implementation. The 'opt-in' approach is an interesting strategy to first pilot the scheme on a smaller scale, get feedback, and adjust the policy, which can increase the likelihood of successful reform implementation in the long term. The 'grandfathering' approach may initially appear to be a smooth and non-contentious way of transitioning to the new career structure, but it raises issues both in terms of management and cohesion of the teaching personnel. In terms of management, administering two sets of career structures simultaneously can prove burdensome for school systems, and delays the impact of the reform, as the incorporation of new teachers under the new structure spans several years. With regards to cohesion, having different, coexisting career structures can cause tension between senior and entry-level teachers, which can undermine the implementation of the reform. Where feasible, a big-bang approach that incorporates some flexibility in its implementation may be more suitable.

Most importantly, our research found that the building of trust and a shared vision among all parties smoothed the transition process. The proper involvement of teacher unions and teacher buy-in were key. In direct relation to obtaining teacher buy-in, reform implementation plans should include a comprehensive communication strategy to strengthen understanding and cooperation between institutions and teachers. An adaptive approach to implementation can help the process as well, since the reform can go through several versions before the design is finalized. An adaptive approach involves a flexible system that includes monitoring and feedback, which can lead to updates or changes to the reform.

In short, our research shows that well-designed and -implemented reforms can have a positive impact on regulating entry into the profession, tackling corruption, diversifying career tracks to help improve retention, and encouraging teacher support roles that help promote greater collaboration. However, these reforms are complex and resource-intensive. In some contexts, the reforms have been mired in implementation challenges to such an extent that it is difficult to be conclusive about the feasibility and desirability of introducing career ladders where education systems still need strengthening.

A key takeaway for governments is thus to carefully evaluate their administrative capacity before launching into major reforms. Failure to deliver on reform promises due to technical, financial, or human resource constraints will result in lost trust and may jeopardize the whole process. Moreover, attempts at improving the status of the profession will be

pointless unless salaries are attractive. Whatever governments decide to do, their efforts will need to be incremental and sustained over several decades to be successful. The issue of cost is critical, yet investing in teachers is investing in our future.

Due to variations in existing career structures, available resources, and cultural views on the prestige of the teaching profession, there is no standard bulleted list of policy advice that can apply to all systems looking to implement teacher career reforms. However, policy-makers can glean valuable lessons from reviewing the successes and shortcomings of the case studies examined in this research. And, as with the reforms themselves, the research into this topic must continue so that policy guidance can adapt and remain aligned with the ever-evolving realities of education and the teaching profession.

Chapter 1

Importance of teacher career models

Introduction

Decline in status of the teaching profession

Despite notable exceptions, the status and appeal of the teaching profession have declined globally. The World Development Report recognizes this issue, noting that 'over the last few decades, the status of the teaching profession has declined across the world in terms of pay, respect, and working conditions' (World Bank, 2018: 138). Ministries of education face common challenges in terms of attracting and retaining capable and motivated educators.

In low- and middle-income countries, the massive expansion in access to education over the previous decades certainly contributed to this decline. To achieve universal primary education goals, many countries increased their teaching workforce considerably, often by lowering entry qualifications and recruiting non-professional and contract teachers, loosening the standards for entry into the profession, and reducing the length of teacher training. This, in turn, contributed to a certain de-professionalization of the occupation, ultimately reducing its status and appeal. In parallel, working conditions in many schools worsened as, despite considerable efforts in recruitment, teachers faced crowded classrooms and ill-equipped or deteriorating facilities. As a result, what had previously been a highly esteemed profession for well-trained individuals has turned in some contexts into an 'employment of last resort' for many applicants (Bennell and Akyeampong, 2007: ix; Bruns, Filmer, and Patrinos, 2011).

Similarly, in the global North, unattractive employment packages, difficult working conditions, changes in school governance, heavy workloads, and high-stakes testing are turning many candidates away from the job and affecting the motivation of those in place. Reports of teachers having to hold two jobs to make ends meet are no longer limited to low-income countries. In fact, *Time* magazine devoted its September 2018 issue to the struggles faced by teachers across the United States of America (USA), revealing that public school teachers in the USA earn

18.7 per cent less per week than comparably educated workers, and less on average (in inflation-adjusted dollars) than they did in 1990 (Reilly, 2018). Other research on US teachers found that 16 per cent of them have second jobs (Lowe, 2018).

This decrease in status, combined with poor working conditions and insufficient acknowledgement of increasingly complex realities of teaching, led to a state of affairs frequently referred to as a 'teacher motivation crisis' (Bennell and Akyeampong, 2007: vi). Studies underline the fact that, in many developing countries, the teaching workforce is seriously demotivated, demoralized, and fractured (VSO, 2002). This situation is particularly worrying as research evidence suggests that teacher motivation is crucial for effective teaching and, ultimately, student learning outcomes (Bennell and Akyeampong, 2007; Michaelowa, 2002; VSO, 2002). With teachers providing the most important school-level variable impacting student learning (Rivkin, Hanushek, and Kain, 2005; Blazar and Kraft, 2017), it follows that if we want to improve the quality of education, we need motivated educators.

Teacher careers can potentially influence teacher motivation

In countries where the status and motivation of teachers have declined, how can we reverse this phenomenon and 're-professionalize' the profession? The problem urgently needs to be addressed, as the perception of teaching as a low-status profession adversely impacts recruitment and retention.

The Education For All (EFA) Global Monitoring Report Team warns governments to think strategically because 'the less attractive the teaching profession becomes, the greater the risk of recruiting a generation of candidates with poor qualifications, less confidence and a lower willingness to innovate', leading to 'long-term effects of a poor cadre of teachers [which] are difficult to reverse' (2015: 4).

From a management perspective, creating a more attractive career structure might be part of the answer if it is properly designed and implemented. Motivation theories highlight the importance of factors such as a sense of achievement, personal growth, recognition, status, autonomy, self-determination, relatedness, collaboration, fair wages, and job stability. All these are connected to the organization of a career and can be built into its design. Enhancing the teacher career structure can thus potentially act as a powerful influence on teacher motivation.

> After prepared and motivated learners, equipped and motivated teachers are the most fundamental ingredient of learning.
>
> World Bank, 2018: 138

> The perception of teaching as a low-status profession can adversely impact recruitment and retention. Improving the status of teaching is not only associated with better motivation and job satisfaction, it can also increase teacher retention and performance as well as student learning.
>
> EFA Global Monitoring Report Team, 2015: 4

The organization and management of teacher careers relates to policies that guide teachers' progression in the areas of skills, pay, qualifications, and responsibilities. In other words, teacher career organization considers teacher promotion or salary increases as well as the mechanisms used to determine teachers' progression. The topic is thus inevitably related to appraisal modes that are generally used to determine career advancement. Paying greater attention to these areas may help to support quality teaching and learning and to improve attraction to the profession, teacher retention, satisfaction, and motivation. This is particularly important in order to work towards achieving the UN Sustainable Development Goal 4, which focuses on improving the quality of education.

About the project

Teacher career reforms are high on the agenda of many governments. A number of countries have reformed their teacher career structures over the past decades, and others plan to introduce changes in the near future. It therefore appears to be a particularly relevant policy issue around the globe. Yet, as countries launch into such reforms, do they have enough information on the diversity of options and their implications? Despite increasing national and international attention to teacher careers, we do not yet know enough about what those career reforms entail, the feasibility and desirability of reforms in diverse contexts, and whether these lead to the intended outcomes.

Policy-makers need to consider their options carefully. What career model will attract the best candidates into the teaching profession and retain them over time? How are these goals achieved in the context of a limited budget? Which career schemes offer the best opportunities for teacher collaboration and professional growth essential for job satisfaction and motivation? Which career schemes can easily be managed? What are the prerequisites for successful implementation?

The potential to learn from other countries, combined with the need to address this gap, prompted the UNESCO International Institute for Educational Planning (IIEP) to launch a research programme on teacher career organization and management. It aims to provide policy-makers and governments with a variety of policy choices related to teacher careers; to explore perceived effects on teacher motivation, attraction, and retention; and to analyse the implementation challenges countries face in the reform process. In doing so, it seeks to raise awareness about policy options and their implications. It is essential for countries wishing to adapt their teacher career schemes to consider this information carefully before deciding on what are complex, resource-intensive, and, most often, politically sensitive reforms.

The following research questions underlie the project:

* What options exist in terms of the organization and management of teacher careers? How are teacher careers structured and promotion methods organized?
* What are the perceived effects of teacher career reforms on teacher motivation, attraction, and retention?
* What are the management implications and implementation challenges of teacher career reforms?

Research process

The project began in 2015. A first step was to find out what kind of career models existed, and which were the most promising in terms of increasing teacher motivation. *Exploring the Impact of Career Models on Teacher Motivation* (Crehan, 2016) reviewed the research literature in the field on teacher career organization. It sought to consider what was known about the impact of different teacher career models and related appraisal modes. It also reviewed the psychological research on motivation, and examined the teacher career structure models in place in different countries. It defined the typology of career models and summative evaluation methods[1] used

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1. The research only refers to summative appraisal or evaluation as opposed to formative appraisal. Career progression is inextricably linked to summative appraisal, as it aims to collect information on performance, which has consequences for the teacher in terms of advancement, remuneration, and recognition (OECD, 2009*b*). It aims to evaluate teachers for the purposes of bonuses, salary increments, or promotions, and can be contrasted with formative appraisal, which seeks to help teachers improve and indicate areas for future professional development. It involves helping teachers learn about, reflect on, and improve their practice.

in this research project. In order to guide the reader through this study, *Chapter 2* offers an overview of the typology.

To assess the desirability and feasibility of teacher career reforms, field research followed. In 2016, a mapping exercise collected accurate country descriptions of teacher career structures in Colombia, Ethiopia, Lithuania, Mexico, Peru, Scotland, South Africa, and Thailand, and identified related challenges as well as perceived effects.[2] National researchers in each of the selected countries analysed laws and regulations, basic statistics, and existing research evidence in addition to conducting semi-structured interviews with those involved in the organization and management of teacher careers.

The field research continued in 2017 with in-depth case studies in Ecuador, New York City, and the Western Cape in South Africa. Its purpose was to provide a more thorough analysis and to find out what teachers themselves thought about changes made to their career. The career models implemented in Ecuador, New York City, and South Africa were selected because of their promising approach of combining career opportunities with new evaluation and salary policies. In all three settings, the adopted career models turned away from an approach based solely on the use of flat salary structures and few promotion options in order to widen the professional opportunities available to teachers.

The research in the project is mostly qualitative, which resulted in a better understanding of the diversity and complexity of teacher careers. Mixed methods were used for the case studies, as the qualitative interviews were coupled with analysis of quantitative data obtained through the use of teacher questionnaires in Ecuador, New York City, and the Western Cape in South Africa.[3]

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2. All reports are available on the IIEP website www.iiep.unesco.org/en/our-expertise/ teacher-careers. They reflect the situation in 2016. Further reforms have, however, since been implemented in some of the jurisdictions. For example, Lithuania adopted a new reform in 2019, and in Mexico, in May 2019, the Congress approved a new constitutional reform removing mandatory evaluations for selecting and promoting teachers, thus reverting to the previous situation. Unless quoting directly or utilizing specific data, all mentions of research results from these countries throughout this report will refer to these country reports. For the sake of brevity and clarity, parenthetical citations will not appear for these references.
3. In Ecuador and the Western Cape, limited inferences can be made due to the small size of the sample and some design issues.

Country selection

This research aimed for a global coverage. Participating school systems reflect a diversity of teacher career schemes and were deliberately selected among countries from different geographical zones. One key selection criterion was that the teacher career reforms must have introduced a career ladder that sought to diversify the professional course of teachers and to widen advancement opportunities. However, previous research (Bruns, Filmer, and Patrinos, 2011; Crehan, 2016) and common sense suggest that this type of career structure may be more suited to high-income countries that have a solid administration and strong legislative and regulatory frameworks in place. To assess their feasibility in other contexts, particular care was taken to include low- and middle-income countries. In order to consider different socio-cultural and socio-economic contexts, our research includes countries with diverse income levels that have worked to revise their career schemes.

In addition, where possible, priority was given to countries that had introduced a strong element of horizontal mobility into their career reform, as opposed to vertical mobility only. Horizontal mobility refers to teachers being promoted to more advanced teacher levels. The concept is based on teachers' meeting certain standards that allow them to remain teaching in the classroom through different promotion steps. This is also sometimes called 'horizontal promotion' (Vegas, 2005), suggesting that the teacher is moving sideways in their current job rather than upwards into a different position. It is commonly seen as an improvement in the economic or employment status of a teacher who works in the classroom. With vertical mobility, teachers are promoted to administrative or leadership positions, and teaching is no longer central to their job.

Another aspect that should be noted for the remaining sections is that the reforms were at different stages at the time of data collection. In fact, it is difficult to associate a reform with a precise date, as revisions and additions are continuously being made. Whereas in some school systems career ladders have been in place since the early 2000s or earlier (albeit with regular revisions, such as Colombia, Ethiopia, Lithuania, Scotland,[4] and Thailand), others have been implemented more recently

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4. Scotland is a country that is part of the United Kingdom. The organization and management of teacher careers in the United Kingdom, like the entire education sector, is devolved and hence run separately in England, Wales, Scotland, and Northern Ireland.

(Ecuador [2011], Peru [2012], Mexico [2013], New York City [2013], and South Africa [2015][5]). As a result, valuable insights can be gained both in the short term and further down the path of implementation. It should also be noted here that the case of New York City is different from that of the other countries, as it did not involve a whole system reform.[6] This research investigated only one programme among others, which proved a limitation as well as a strength that will be discussed throughout this study.

Scope and limitations

Our research focuses on primary and secondary school teachers employed as civil servants. This research scope is restricted to career schemes developed for public school teachers only. Although contract teachers can represent a significant portion of the education workforce in many contexts, including in a number of our sample countries, this teacher population could not be included in this research.[7] By definition, contract teachers are employed on a temporary basis and cannot apply for professional advancement. Processes exist in many contexts to recruit contract teachers as permanent staff, who can then benefit from the career schemes in place.

When discussing teacher attraction and retention, salary levels clearly come into play, especially at the entry level and mid-career level of the profession when compared to other professions with similar qualifications. If salaries are not attractive enough, it is doubtful that changes to the career structure will have any effect. This project did not seek to make a comparative analysis of salary levels across countries. Nonetheless, information on starting salary and comparisons with salaries across comparable professions were collected whenever available and provided useful insights.

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5. The dates indicated here reflect the introduction of additional positions opened to teachers.
6. Unlike the rest of the settings in our sample, New York City is not a country. However, it has the biggest school system in the USA. Its Department of Education (DoE) oversees some 76,000 teachers. For the sake of simplicity, when referring to all participating settings in our research, the term country is used.
7. Conditions of employment varied significantly across the countries included in our sample. The information on the proportion of contract teachers or fixed-term teachers was not always available. Peru reported the highest rate, with 31 per cent of contract teachers in 2015.

By design, this research is strongest in terms of the insights it gives into career reforms on a managerial level and concrete design elements of the career structure. It was more difficult to obtain information on motivation, satisfaction, attraction, and retention for several reasons. First, motivation is notoriously difficult to measure. A number of variables can be associated with motivation, making it simply too complex to draw direct links. As Bennell and Akyeampong rightly point out, 'measuring the determinants and consequences of work motivation is complex because these psychological processes are not directly observable and there are numerous organizational and environmental obstacles that can affect goal attainment' (2007: 3). Second, it is difficult to validate a causal relationship between career structures and teacher motivation because a wide range of factors intervene in that relationship, making it challenging to separate external factors that affect teacher motivation from those that are linked to career-related concerns. In addition, career structure reforms are often introduced along with broader education sector reforms, making it difficult to single out the effects of changes made to teachers' careers. Adding to the complexity is the number of different combinations possible between career models, as well as evaluation modes.

For all these reasons, this research looked into 'perceived effects' and focused on intermediate variables that are likely to increase autonomous teacher motivation: agency over career choices, teacher collaboration, and opportunities for continuous professional development (CPD).

As pointed out earlier, career structures are constantly evolving. A number of school systems included in our sample have introduced changes to their teacher career structure since this research was undertaken. It should thus be taken into consideration that the research results presented in this publication are based on a snapshot at one particular point in time.

Structure of the study

Our research findings highlight key aspects that policy-makers need to consider before embarking on teacher career reforms. The rest of this publication will be structured as follows. First, different teacher career models will be introduced in *Chapter 2* in an effort to categorize the design options that are available to policy-makers. This chapter will highlight their advantages and disadvantages as well as offering an overview of the models in use in our sample school systems. Information on the perceived effects of teacher career reforms on teacher motivation

and satisfaction, attraction, and retention will be discussed in *Chapter 3*. *Chapters 4* and *5* showcase key lessons from reform implementation in terms of design and structure, and administration and management. By way of conclusion, further reflections are offered in *Chapter 6*. Summaries of the career structure found in participating countries are given in the annexes. They offer a concise analytical overview of the organization of teachers' careers, implementation challenges, and perceived effects in each context. A glossary of the terminology used in this project can also be consulted in the annex. Indeed, there is a great diversity in the vocabulary used, which often creates confusion: sometimes the same terms are used to describe very distinct concepts. The glossary is therefore a useful reference to turn to for a common understanding of the key concepts used in this publication.

Chapter 2

Evolution in teacher careers

Why are so many countries reforming their teacher career structures? This chapter will seek to answer this question by providing a historical overview of developments in the conceptualization of teacher careers. It will also offer a typology of teacher career models implemented around the world and their implications in terms of motivation and administration. Before delving into the findings of our research, this chapter provides an overview of the different models in use in our sample of school systems to help the reader understand the range of possibilities and the diversity of career systems in place across the globe.

Shifts in teacher careers

Moving from first- to second-generation teacher careers

There have been important developments in the conceptualization of teacher careers in recent decades. A combination of trends in global policy, as well as problems with conventional teacher career structures, can help to explain why teacher careers have become the focus of such attention. A helpful way of understanding the evolution of career structures is a categorization found in Latin American literature on this topic, distinguishing two generations of teacher careers – the first and second generations (UNESCO, 2015*a*).

The first generation of teacher careers includes those designed between the early 1950s and late 1990s. It coincides with the development of the welfare state and is characterized by the recognition of teachers as workers with labour rights protected by the state (Terigi, 2010). This generation of teacher careers is based on long-term service in the profession and vertical progression. With vertical progression, teachers are promoted to administrative or leadership positions within the school (school director, deputy director) or outside the school (inspector, administrator) and teaching stops being central to their job. Career development is possible based on qualifications and experience, such as length of service. Morduchowicz (2011) identified a set of elements that characterize careers that belong to the first generation. Among the most important are job security, basic wage structures, and automatic salary

increases and promotions that are based on seniority and certification rather than performance.

The second generation of teacher careers reflects the influence of neoliberalism and began in the early 2000s. It coincides with the rise of performance-based management and the transfer of private-sector managerial techniques to the public sector, including a shift towards more accountability, evaluation, and merit-pay programmes. In the education sector, a consensus has emerged around the recognition of teacher performance as fundamental to improving education quality. This factor, combined with the fact that teacher salaries typically represent the largest category of public education spending, unsurprisingly resulted in many countries undertaking reforms affecting the organization and management of their teachers' careers.

With second-generation teacher careers, the working life of teachers is organized around efficiency and accountability. This affects two fundamental issues: the introduction of salaries by levels of performance; and loss of job security. These careers, clearly meritocratic in their approach, typically include mechanisms for horizontal promotion, performance evaluation, and results- and incentive-based schemes.[8] In most cases, they clearly signal that low-performing teachers can no longer stay in the profession without taking remedial action.

Peru offers a good illustration of this shift. A series of laws introduced since 1984 has steered the country away from a system of seniority to one of performance. The salary spine – accompanied by mandatory evaluations – increased from five to eight levels. Unlike in the past, teachers can be dismissed if they fail their evaluation. Progression opportunities available to teachers increased with the development of streams or pathways. *Table 2.1* shows the progression of career structures in Peru from a first-generation model in 1984 to the incorporation of second-generation characteristics into the reforms of 2007 and 2012.

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8. This useful distinction between first- and second-generation teacher careers simplifies matters to a certain extent and requires some nuancing. In some first-generation teacher careers, summative evaluation may have been present together with a limited number of horizontal progression opportunities.

**Table 2.1   Key characteristics of teacher careers introduced
by successive laws in Peru**

Teacher Law (1984)	Public Teaching Career Law (2007)	Teacher Reform Law (2012)
Automatic and universal integration of teachers	Gradual and voluntary integration of teachers	Automatic and universal integration of teachers
Seniority aspect dominates	Meritocracy aspect dominates	Meritocracy aspect dominates
Two streams available to teachers: teaching; management	Three streams available to teachers: pedagogical management; institutional management; investigation	Four streams available to teachers: pedagogical management; institutional management; teacher education; innovation and research
Five levels in the salary spine	Five levels in the salary spine (reaching the highest level after 20 years of service)	Eight levels in the salary spine (reaching the highest level after 30 years of service)
Does not establish exact percentage increase between five salary spine levels	Establishes exact, permanent percentage increase between five salary spine levels	Establishes exact, permanent percentage increase between eight salary spine levels
Does not establish periodic mandatory evaluations to progress in career	Establishes periodic mandatory evaluations to progress in career	Establishes periodic mandatory evaluations to progress in career
Failure in the evaluation does not lead to teacher dismissal	Failure in the evaluation (three times) leads to teacher dismissal	Failure in the evaluation (three times) leads to teacher dismissal

Source: Mendoza (2019: 12), as adapted from MINEDU (2012).

Dissatisfaction with first-generation teacher careers

Teacher careers evolved not only as a reflection of neoliberal trends in policy-making but also because of rising dissatisfaction with first-generation teacher careers. In both North and South, the move towards teacher career reforms was spurred by a desire to depart from traditional systems and led to the adoption of alternative career models. But the shift towards second-generation teacher careers will not by itself solve the problems faced by the teaching profession. And the fact that they are second-generation models does not guarantee that they are better: both models have their advantages and disadvantages. The problems with both types are discussed below, together with a typology of the different career models, their effects on motivation, and their implications in terms of management and administration.

A typology of career models

This research gave rise to a classification into four types of career models. Though these four types necessarily simplify variations among complex systems and structures, they emphasize the design elements that are typical in the organization of teacher careers. This typology of career models, developed by Crehan (2016), is used throughout this study.[9] It is thus important that these career models be presented in some detail.

The first model presented in *Figure 2.1* is the single salary schedule, a first-generation career model whereby differentiation and promotion are based on seniority and experience, not performance. The other three models illustrated in the figure are second-generation career structures where differentiation is made between teachers based on their performance. They include bonus pay, salary progression based on appraisal, and career ladder. These three models rely on summative appraisals to differentiate between teachers.

Figure 2.1   First- and second-generation teacher careers

First-generation careers	Second-generation careers		
Single salary schedule Teachers progress through the salary scale at the same pace. Progression is based on qualifications and seniority	**Bonus pay** Teachers receive a one-off payment based on positive appraisal	**Salary progression based on appraisal** Teachers move through the salary spine at different speeds depending on their appraisal	**Career ladder** Teachers are promoted to new roles and responsibilities based on their appraisal and receive additional salary
Summative appraisal is not mandatory for automatic advancement	**Summative teacher appraisal** Constitutes a fundamental aspect of decisions concerning promotion or salary progression		

Source: Compiled by authors.

Single salary schedule

The single salary schedule is still the most common model found across the world. In such a system, promotions are based on years of experience and academic qualifications, which do not consistently correlate with teacher quality (Bruns, Filmer, and Patrinos, 2011; Wilson, Floden,

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9. This section summarizes the work of Lucy Crehan (2016) in the exploratory study conducted for this research, *Exploring the Impact of Career Models on Teacher Motivation*. Please refer to the original text for additional information.

and Ferrini-Mundy, 2002). Teachers' pay increases year after year, irrespective of whether they improve their practice.

This model presents several advantages, but also comes with many shortfalls. The first major benefit is that it is does not differentiate between teachers, who all progress at the same pace. From a management perspective, this makes the system easy to administer and does not require a complex and costly evaluation system for which human resources are frequently lacking. In addition, payroll and financial projections of teachers' wage bill are relatively straightforward, making budget planning easier.

For teachers, this model is often associated with lifetime job security. It does not put them into competition with one another, thus providing an environment that is conducive to collaboration. Nevertheless, while some teachers are opposed to modifying the single salary schedule for these reasons, others complain about a lack of promotion prospects and only receiving salary increases based on years of service. Indeed, the literature underlines widely discussed issues related to this model.

From a motivation perspective, the lack of correlation between promotion criteria, such as certificates and experience, and teacher effectiveness has a demotivating effect in first-generation models. High-performing teachers become demotivated when they repeatedly see less dedicated, poorly performing colleagues receiving the same automatic salary increases as they do (Bennell and Akyeampong, 2007). Moreover, this system reduces the opportunities for professional development. The lack of career progression that allows teachers to stay in the classroom is often another demotivating factor. These issues mean the most able teachers may stop teaching to take on administrative positions (Vegas, 2005), which can be detrimental to education quality. This lack of recognition and career development, in addition to affecting motivation in existing teachers, may also deter potential candidates from considering the profession.

In short, this model is unable to properly reward and recognize high-performing teachers. The flat salary structure as well as limited self-determination and control over career paths typical of this model can make the teaching profession less attractive to the most talented and highly motivated individuals.

Bonus pay

Bonus pay refers to programmes that award teachers one-off financial rewards for a specific achievement. The best teachers are identified using some form of performance measurement such as student results, teacher observations, or a broader teacher evaluation. These teachers then receive a bonus or a salary supplement for a finite period. This introduces a direct, quick, and temporary link between performance and financial reward. Bonus pay has been widely discussed and the literature analysing it is divided (Fryer, 2013; Podgursky and Springer, 2007; Murnane and Cohen, 1985). Some experts highlight successful policies that seem to have improved students' learning results in the short term, praising the practical aspects that make bonus pay policies easy to implement. Others, on the other hand, claim that bonus pay systems are largely ineffective and undermine intrinsic motivation.

From a management perspective, the model offers the advantage of being a quick fix. It does not require new legislation to be approved (unlike competency-based promotion) and does not increase the base salary bill. As a result, it is easy to implement, adjust, and stop, if necessary. Countries seeking a quick strategy for injecting performance incentives into dysfunctional teacher pay scales often turn to bonus programmes first. Where many countries have student assessment systems in place, bonus pay offers a way to link teacher pay directly to the performance measure they value most – progress in student learning.

But this has been beset by measurement problems (how do you fairly compare student grades across subjects and year groups?) and unintended consequences (teachers teaching to the test or cheating to improve whatever measure is rewarded) (Crehan, 2018; Rothstein, 2017; Ballou and Springer, 2015). In addition to putting teachers under considerable stress, payment based on student results has also been roundly criticized for disincentivizing collaboration and being unfair to teachers in challenging schools as it is an unreliable way to judge teacher quality.

Bonus pay assumes that teachers are motivated by financial rewards and will thus work harder to secure them. Even if some experts point to improved student results and the practical aspects that make bonus pay easier to implement, this model is considered less promising than others. Critics argue that the model relies heavily on extrinsic motivation, which might undermine teachers' intrinsic motivation (Crehan, 2016). Some also argue that financial rewards neither allow teachers to work

towards competence nor contribute to increased teacher autonomy, both of which influence teacher attraction, motivation, and retention in the long term. It seems that these features are more likely to be achieved by the next two models.

Salary progression contingent upon appraisal

Another career model involves a system where salary progression is contingent upon appraisal. Under this model, teacher salaries increase at key points and are dependent on successfully passing an appraisal. The salary spine can consist of a number of different levels or grades, and the period of time between the evaluations can vary from six months to more than four years. After obtaining a successful evaluation, teachers move to higher salary levels in the pay spine. Moving up the salary levels is not associated with additional responsibilities or new status.

This career model ensures that inefficient teachers do not progress up the salary spine at the same pace as their better-performing peers. This helps overcome the issue of motivation posed by the single salary schedule, because offering progression is more likely to be seen as affirming competence rather than controlling behaviour (Crehan, 2016). Moreover, it signals a long-term trajectory of potential performance rewards, which increases the attractiveness of the profession (Bruns and Luque, 2014). Even if the model introduces quite a direct link between performance and pay, it is less direct than a bonus pay system. However, the link between appraisal and pay might to a certain extent undermine intrinsic motivation. Existing research thus points to different possible effects depending on specific policy designs.

However, as mentioned earlier, the main disadvantage of this model is that it requires a robust evaluation system, meaning financial and trained human resources must be available. Further, the teachers themselves must also recognize the validity of the appraisal process and consider the system to be fair, transparent, and equitable. Bruns and Luque (2014) also warn that this model has long-term fiscal implications because it increases teachers' base pay and pensions. Introducing changes to this model once it is in place can be politically and administratively complicated.

Career ladder

The last model upon which our research focuses is that of the career ladder. Under this scheme, teacher pay progresses up to a point, beyond which they must pass an appraisal (if they want to obtain a promotion)

and take on an enhanced role with additional responsibilities. Promotion to new roles and titles can be based solely on their evaluation or can be combined with additional qualification or training requirements linked to the new role. Some structures may also require teachers to complete a successful induction period. A career ladder can include a different number of positions with various levels of responsibility, with pay reflecting the new positions further up the ladder.

A career ladder hence refers to both horizontal (teachers are promoted to more advanced teacher levels and teaching in the classroom remains key to their work) as well as vertical mobility opportunities (teachers are promoted to administrative or leadership positions and often stop teaching). Where both horizontal and vertical positions are available, these are generally referred to as career pathways, streams, or tracks. A career ladder could have just one stream; however, innovative systems tend to develop career pathways.

The most commonly cited career pathways model is that of Singapore, which is presented in *Figure 2.2*. In this model, teachers can choose between three streams or tracks: the teaching track; the leadership track; and the senior specialist track.

Figure 2.2   Singapore's career structure
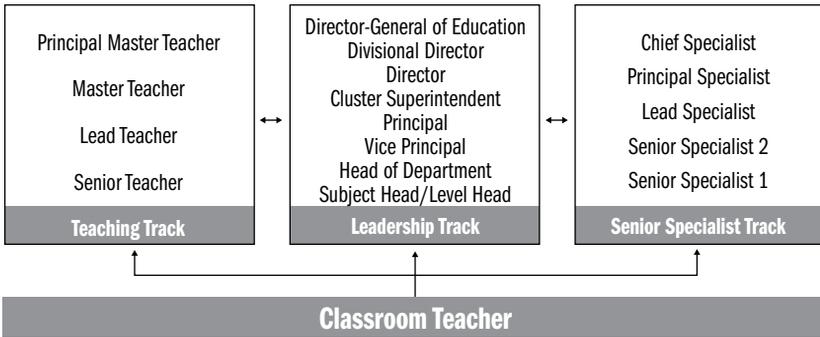
Source: Singapore Ministry of Education (2019).

As teachers qualify for different positions by meeting certain standards at different stages in their career, this structure is a popular one internationally. Many reports and reviews in the international literature recommend it as being a sensible approach, and one which is in line with psychological research on human motivation (Conley and Odden, 1995; Benveniste, Marshall, and Araujo, 2008; Johnson and Papay, 2009;

Ingvarson, 2012; Crehan, 2016; Crehan, 2018). However, while several countries are working with such systems, there are only a limited number of evaluations of the difference they make to student outcomes (e.g. Sloat, 1994; Silman and Glazerman, 2009; Martins, 2009; Crehan, 2018).

Nevertheless, this model is perceived as advantageous because it enables teachers to take control of their own professional development and apply for new positions without necessarily having to leave the classroom. Promotion to higher positions allows recognition of teacher competence, rewards excellence, and increases teacher autonomy by awarding additional responsibilities when teachers progress in their career (Crehan, 2016). It is considered as a promising model to help teachers work towards competence gradually, by simultaneously increasing their level of autonomy and ensuring they are in charge of their own career course. According to motivation theories, these aspects are considered key to teacher motivation.

Finally, the career ladder appears to be a more promising model when presented as an alternative approach to overcoming the problems inherent in the single salary schedule and performance-related schemes. It allows pay to be linked to performance indirectly, offering teachers a pathway for professional growth. Consequently, it is believed to increase the autonomous motivation of teachers. However, there are significant variations within the career ladder structure used by different countries, and different features are likely to result in different outcomes.

Like salary progression through appraisal, however, a career ladder requires a robust administration, and related implementation challenges have seldom been investigated. Furthermore, as will be discussed in *Chapter 4*, design elements are essential to its success. This model also has long-term fiscal implications because it increases teachers' base pay and pensions. Yet, while all these factors might be trickier from a management standpoint, it remains a better way of rewarding teachers.

Advantages and disadvantages of each model

It can be difficult to move away from systems in which there is relatively little distinction made between teachers and where salary progression is automatic. It requires differentiating fairly between teachers by conducting large-scale evaluations or appraisals, as well as having the administrative capacity to operate such systems. Moreover, the career structure must be designed in such a way that it does not introduce

elements that demotivate, such as putting teachers into competition with one another rather than encouraging collaboration. Instead, the career model must ensure that appraisal is perceived as just and transparent, as not controlling, and as encouraging autonomy. Striking the right balance is not easy. While most would agree that giving greater recognition and access to higher-status positions to high-performing teachers is desirable, there is no consensus on how this can be achieved most effectively.

All in all, conclusive evidence on the effects of different career models is still missing. While career ladders appear to be the most promising model for teacher motivation, it is also the most demanding in terms of administration. The lack of human resources for conducting teacher evaluation in particular is a key impediment to the implementation of the model. In choosing a career model, therefore, the challenges of implementation must be weighed against the potential for improving teacher motivation. *Table 2.2* provides a succinct overview of the advantages and disadvantages of each model.

What career models did we find in participating countries?

Countries mix and match among career models

Table 2.3 provides an overview of the career models found in our selected school systems. It shows how countries mix and match among different career models and that countries use a combination of first- and second-generation career models. All cases, except for Ethiopia, have more than one career model in place. Elements of the single salary model remain in Colombia,[10] Lithuania, Mexico, Scotland, and South Africa, whereby teachers receive a certain salary increase that is automatic and not based on their performance. However, in all these countries it accounts for only a marginal salary increase, whereas other models often give more weight to salary progression.

Six of the selected countries use a salary progression based on the appraisal model (i.e. Colombia, Ecuador, Mexico, Peru, South Africa, and Thailand). However, the design of the salary spine varies considerably in each of these countries in terms of the number of salary steps and the mandatory length of service before the next level can be accessed.

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10. Only for the old career statute. Roughly 50 per cent of teachers are employed under this statute.

Table 2.2   Typology of teacher career models, advantages and disadvantages

Career model	Main characteristics	Pros and cons for motivation	Pros and cons for administration
Single salary schedule	Teachers' pay increases yearly, based on seniority and qualifications.	No competition between teachers. Little accountability for the quality of teaching.	Straightforward projections of the wage bill. No need for extensive summative teacher appraisal and resource-intensive evaluation systems.
Bonuses	Teachers receive a one-off payment based on student results or broader appraisal.	Extrinsic incentives used. Encourages controlled motivation and discourages collaboration.	Bonuses do not modify base pay and pension calculations. They can be added or removed depending on available finances. Requires a robust appraisal system to distinguish teachers entitled to a bonus.
Salary progression based on evaluation	Teachers move through the existing salary structure at different rates, based on their evaluation.	Prevents underperforming teachers from progressing automatically through the salary scale.	Long-term fiscal implications of modifying base pay and pensions. Requires a robust appraisal system to differentiate teachers.
Career ladders and pathways	Teachers are promoted to new roles and titles based on their evaluation, with a salary rise attached.	Makes the link between performance and pay indirectly, reducing the likelihood of encouraging controlled motivation.	Long-term fiscal implications of modifying base pay and pensions. Requires a robust appraisal system and clear standards for each position against which teachers are assessed.

Source: Compiled by authors.

For instance, in South Africa, teacher salaries can increase each year and there are as many as 221 salary levels, whereas in Colombia, salaries can increase no sooner than every three years and there are only three salary grades, each containing four levels. In Peru, eight salary levels are in place and the duration of service at each level varies from three to five years, depending on the level.

The bonus pay system is almost completely absent in most of the selected countries. Only in Peru has an established bonus pay scheme been identified. However, in some cases bonuses are awarded to teachers at local or school level, even if they do not form part of a national and well-institutionalized practice (Colombia, Lithuania, and South Africa).

Table 2.3   Career models that are currently in use in the selected contexts

Setting	Career models currently in use			
	Single salary schedule	Salary progression based on appraisal	Career ladder	Bonus pay
Colombia	+	+	+	
Ecuador		+	+	+*
Ethiopia			+	
Lithuania	+		+	
Mexico	+	+	+	
New York City	+		+	
Peru		+	+	+
Scotland	+		+	
South Africa	+	+	+	
Thailand		+	+	

Source: Compiled by authors. * Ecuador has bonus pay, although it is not applied consistently.

Career ladders take different forms

In accordance with the project design, all the countries studied at least partly rely on a career ladder model. Career ladders have traditionally allowed teachers to move up vertically, to managerial or institutional functions. However, some of the new career structures have diversified horizontal positions geared towards teaching or academic instruction. Teachers can develop their career through the occupation of roles that are directly related to what they know best. For example, teachers can move

from junior teacher to experienced or Master Teacher levels. Moreover, some positions may include roles such as mentoring or coaching and leadership that were previously carried out with no formal regulation, but that now receive legitimacy and value. The various positions are organized in 'tracks', 'paths', or 'streams'. The most common are the teaching and management tracks, but, as *Table 2.4* illustrates, others also exist.

> It is nice to be compensated finally for extra work that we've been doing for a decade.
>
> Teacher, New York City (Crehan, Tournier, and Chimier, 2019: 38)

Five countries have pathways (Lithuania, Mexico, Peru, South Africa, and Thailand) that offer both horizontal and vertical mobility. Others have only one ladder where lower levels are reserved for academic/teaching positions before moving up to managerial functions. Ethiopia is the only example in which teachers are unable to advance to management positions, as these are reserved for outside nominations. *Table 2.4* summarizes the various positions found in each of the career ladders.

Despite showing the positions that are available, however, there is no implication that all of these positions are in place in sufficient numbers. In Ecuador, there is a great deficit of non-teaching positions. In Peru, the teacher education and innovation and research tracks had not been implemented at the time of this study. Similarly, in South Africa, positions in the teaching and learning path had not been staffed.

The case of New York City is quite specific and needs to be explained in more depth. While we have categorized it as a career ladder model, it is in fact a hybrid system between bonus pay and career ladder. The Teacher Leader positions open to teachers under the Teacher Career Pathways (TCP) programme are based on teachers acquiring additional responsibilities for which they get additional pay. However, the TCP programme is, as its name suggests, only a programme in the sense that it is not permanent. It is possible that it could be discontinued at any point in time if funds are unavailable. This suggests that in terms of the management of the programme, it is more similar to bonus pay than a career ladder. It cleverly manages to integrate the advantages of both systems. In other school systems, the reforms are wide-ranging, and the modifications made to the career structure are permanent.

Table 2.4   Teacher career ladders and streams in the cases analysed

Country	Career ladders and streams			
Colombia	• Classroom teacher • 'Support leader' teacher • Coordinator • Orientation adviser • Rector and director			
Ecuador	• Teacher • Teacher-mentor • Student adviser • Inspector or deputy inspector • Rector/director or deputy rector/director • Educational adviser • Educational auditor			
Mexico*	*Teaching*		*Management*	
	• Teacher • Educational pedagogical technical adviser		• School director • Subdirector • Coordinator of extracurricular activities • Supervisor • Regional supervisor • Academic supervisor • Pedagogical adviser	
Peru	*Pedagogical management*	*Institutional management*	*Teacher education*	*Innovation and research*
	• Classroom teacher • Student adviser and coordinator • Academic coordinator • Extracurricular programme coordinator • Counsellor	• School principal or vice principal • Education specialist in Education Management Unit (UGEL) or Regional Education Board (DRE) • Director of pedagogical management in UGEL or DRE • Director of UGEL	Not yet implemented	
Lithuania	*Teaching*		*Management*	
	• Teacher • Senior teacher • Teacher-methodologist • Teacher-expert		• Chief of teaching • Deputy principal • Principal	
Scotland	• Classroom teacher • Principal teacher • Deputy head teacher • Head teacher			

Country	Career ladders and streams			
Ethiopia	• Beginner teacher • Junior teacher • Teacher • Senior teacher • Associate lead teacher • Lead teacher • Senior lead teacher			
South Africa	Teacher Senior teacher			
	Teaching and learning	*Management and leadership*	*Education planning, research, and policy development*	
	• Teaching and learning specialist • Senior teaching and learning specialist	• Head of department • Deputy principal • Principal • Circuit manager	• Education specialist • Senior education specialist • Deputy chief education specialist • Chief education specialist	
Thailand	*Teaching*	*School direction*	*Education management*	*Education supervision*
	• Skilled teacher • Experienced teacher • Expert teacher • Specialist teacher	• Skilled deputy director • Experienced deputy director/expert deputy director • Skilled director • Experienced director • Expert director • Specialist director	• Experienced deputy director of Office of Education Area • Expert deputy director of Office of Education Area • Expert director of Office of Education Area • Specialist director of Office of Education Area	• Skilled education supervisor • Experienced education supervisor • Expert education supervisor • Specialist education supervisor
New York City**	Teacher Leader positions available under the *Teacher Career Pathways* programme: – Model Teacher – Peer Collaborative Teacher – Master Teacher – Teacher Team Leader			

Source: Compiled by authors. * In the case of Mexico, the career ladder is not grouped around streams but under seven different groups (primary schools, preschools, high schools, special education, physical education, support staff, and education assistance). For the sake of clarity, the various positions were grouped under teaching and management streams. ** Other positions exist in New York City, such as Teacher, Classroom Coach, Learning Partner, Teacher Leader, Principal, or Principal Assistant. These were not investigated as part of this research. Some are associated with additional compensation and others are not.

Conclusion

There are variations within the four career structure models in terms of their design and the way they are combined and used together. The single salary schedule model has been widely discussed in the literature, but existing research evidence on the other three career models is quite limited (with the possible exception of bonus pay), to the extent that no firm conclusions can be drawn on the effect of each model on teacher motivation.

This research opted to focus on countries that had a career ladder in place. In theory, they offer the most promise for increasing the status of the profession, regulating entry and retention, and rewarding the most able teachers.

The following chapters attempt to provide insights on the effects of teacher career reforms in our sample of countries, to highlight the importance of design, and to caution against underestimating the complexity of implementing such reforms.

Chapter 3

Teachers' perceptions of career schemes and effects on their profession

While an increasing number of countries are undertaking teaching career reforms, little is known about the effects these reforms have on teachers. How do teachers perceive these career schemes? What are the effects on teacher motivation, attraction, and retention? What other conditions need to be met for new career structures to yield positive effects on the profession?

One of the main purposes of this research is to hear from teachers about how they felt about changes to their careers. Motivation theories suggest that the most promising teacher career models are those that are able to support autonomous motivation, as opposed to those that only provide teachers with external rewards. According to Ryan and Deci (2000), autonomous motivation encompasses both intrinsic motivation (teachers inherently enjoy the activity) and internalized extrinsic motivation (teachers respond to extrinsic incentives because they recognize the value of the goals the activity is contributing to). The key to enhancing autonomous motivation is the fulfilment of three human needs: autonomy; relatedness; and competence (Gagné and Deci, 2005). This research therefore explores how emerging career models affect these needs, which directly correlate to teacher agency, collaboration, and CPD. Ultimately, our research analyses the effects of the career structures on teachers' motivation to join and remain in the profession, looking at two variables: teacher attraction and retention.

Teachers were not consulted as part of the mapping exercise done in the initial stage of this project. The findings presented in this chapter therefore mainly draw on three in-depth case studies carried out in Ecuador, New York City, and the Western Cape in South Africa. The New York City teacher career structure is a combination of a single salary schedule with an automatic yearly salary increase, and a career pathway offering opportunities for vertical and horizontal mobility. Teachers who want to progress in their careers while remaining in the classroom can apply for three Teacher Leader positions associated with differentiated responsibilities and levels of pay: Model Teacher; Peer Collaborative Teacher; and Master Teacher. In South Africa, teachers can

choose between a teaching and learning stream (to advance as a teacher in the classroom), a management and leadership stream (to move into management and leadership positions within the school and education system), and a research and policy development stream (to pursue a more academic path). In Ecuador, the reforms introduced a salary scheme based on appraisal, as well as a career ladder with new support and management roles including mentor teacher, student adviser, education evaluator, and education auditor.

In each setting, researchers conducted focus group discussions with teachers, and semi-structured interviews with education administration officials at the central and local levels, school principals, evaluators, and teacher union representatives. Qualitative data collection was complemented by a questionnaire, which was completed by 267 teachers in Ecuador and 128 teachers in South Africa. In New York City, researchers could access the results of a longitudinal survey commissioned by the New York City DoE and conducted by an external education evaluation company. This survey, answered by more than 5,800 respondents in 2017, asked principals, Teacher Leaders, and teachers about the impact they felt the career pathway had had on their school.

This chapter reports on teachers' perceptions of the effects that newly introduced career schemes have on teachers' autonomous motivation, as well as their wish to join and remain in the profession. The chapter argues that career reforms have strengthened teacher agency, although there are limitations due to reform design and implementation challenges. It highlights the positive effects that well-designed career reforms can have on teacher collaboration and professional development. The chapter also explains that career reforms in the researched settings have mixed effects on teacher attraction and retention. It finally stresses the importance of the fundamental or basic conditions required for teacher career structures to positively affect teacher motivation.

Teacher agency is constrained by career reform design and implementation challenges

This research looks at the effects of new career structures on teacher agency, as an indicator of teacher autonomous motivation. Teacher agency generally refers to 'the capacity of teachers to act purposefully and constructively to direct their professional growth and contribute to the growth of their colleagues' (Calvert, 2016). For the purpose of this research, we specifically looked at how career structures affect teacher

agency over their professional mobility – i.e. the amount of choice teachers have in determining the direction of their careers. Interesting findings also emerge on teacher agency over school decision-making.

Agency over professional mobility

This research pays special attention to career schemes that aim to expand the advancement opportunities available to teachers while still allowing them to stay in the classroom. Although the design of these schemes differs substantially from one country to another, teachers can in principle choose from multiple positions and progress through their career, as long as they meet the appraisal and qualification requirements. Such schemes aim to stimulate teachers' sense of self-determination, recognizing their inherent need for agency over their professional mobility.

In the countries studied, teachers' agency over their professional mobility appears to be strengthened by the possibility of choosing between different positions and career pathways. In New York City, the design of the TCP programme promotes teacher agency: it is up to the teachers themselves whether to apply for qualification, and it is entirely based on their own practice and answers at interviews as to whether they are successful in gaining this qualification. They do not need permission, or the recommendation of a principal or other senior colleague, to take this step. Indeed, the programme appeared to meet a demand for such opportunities, as explained by one school principal: 'You have a lot of good teachers who don't want to become administrators, because the administrative piece is really bureaucratic, and political' (Crehan, Tournier, and Chimier, 2019: 33). In South Africa, as illustrated in *Figure 3.1*, a majority of surveyed teachers 'agreed' or 'strongly agreed' that they actually have control over the direction their career took.

While teachers appreciate having more opportunities for professional mobility in theory, the research shows that agency within the profession is limited in practice. Several constraints on teacher agency related to the design and implementation of career structures were observed in the three settings.

In New York City, when the budget is insufficient, school principals are unable to hire qualified Teacher Leaders. In South Africa, the teaching and learning pathway is underutilized because of insufficient funds at the province level, which limits the availability of positions. Another issue stems from a shortage of applications from teachers, who believe that the pathway does not really offer a change or improvement in role or salary.

Figure 3.1   Perception of teacher agency in South Africa

'I have control over the direction my career takes me' (n = 128)
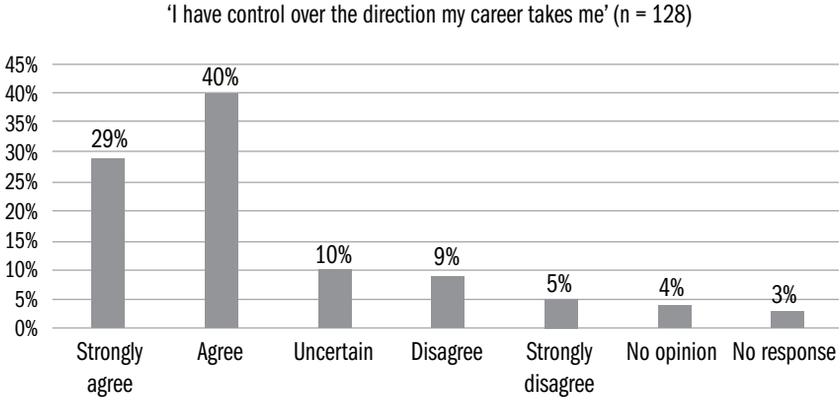
Source: Unpublished data from Sayed and de Kock (2019).

In Ecuador, while teachers report that new opportunities for horizontal and vertical mobility enable the prestige of the teaching profession to begin to approach that of medicine or law, few of them actually benefit from the new career opportunities introduced with the reform. Figures presented in *Table 3.1* show a large deficit in comparison to the expected recruitment for several support and management roles in the career ladder. This gap is explained both by budgetary issues, which limit recruitment, and by the lack of applicants who fulfil the requirements for the positions.

In Ecuador, teachers complain about a lack of information in relation to requirements and recruitment processes. This may explain why only 26 per cent of teachers surveyed indicate that they have applied for another position.

Keeping teachers informed also impacted teacher agency in South Africa. Those interviewed indicate that they feel dependent on school principals to access information about the salary scale and career advancement opportunities. This dependence is also perceived as a lack of autonomy. In addition, while teachers report being aware of promotion opportunities, they are less informed about the different requirements and criteria for accessing these positions. The challenge of access to information is particularly emphasized by respondents in rural areas of the Western Cape, reflecting an issue of unequal degrees of agency among teachers.

Table 3.1   Occupied positions in comparison to planned needs in Ecuador

Positions	Occupied positions	Percentage achieved in relation to planned needs
Mentor teacher (Docente-Mentor)	0	0%
Student adviser (Consejero Estudiantil)	2,427	62.7%
Director / rector (Director(a) / Rector(a))	347	7.2%
Deputy rector (Vicerrector)	1	0.05%
Inspector (Inspector)	187	8.9%
Sub-inspector (Subinspector)	1	0.05%
Education evaluator (Asesor Educativo)	88	3.9%
Education auditor (Auditor Educativo)	42	15%

Source: Chiriboga Montalvo and Pinto Haro (2019: 34), as adapted from MINEDUC (2017).

Agency over school decision-making

The importance of agency beyond teachers' control over their professional mobility is even clearer when looking at additional teachers' responses. Interviewees identify involvement in school decision-making processes as a key driver of their motivation. This corroborates international research findings showing that teachers who are provided with opportunities to participate in school-level decision-making report higher levels of job satisfaction (OECD, 2014: 182).

The TCP programme in New York City is a particular case in point. Teacher Leaders explain that, by taking on new roles in the classroom, they gain a voice in discussions around curriculum and pedagogical issues (see *Figure 3.2*). Teacher Leaders reported feeling more empowered to affect change in their schools and present other teachers' viewpoints to management. In an environment in which the language used by teachers to describe 'the administration' was often negative and distrustful, some Teacher Leaders found themselves working more closely with principals and having more say in teaching and learning matters. A DoE official explained: 'UFT [United Federation of Teachers] and DoE believe that if you extend teacher instructional impact you are empowering them in their roles as educators and also extending themselves as change agents for the school' (Crehan, Tournier, and Chimier, 2019: 34).

Figure 3.2   Teacher Leaders' involvement in leadership decisions in New York City

This year, I was part of conversations with school leadership about making curricular choices for our school.

This year, I was part of conversations with school leadership about making decisions about the school's instructional goals and practices.

This year, I was part of conversations with the school leadership about how and where to allocate resources (time and money) to support instructional goals.

■ Strongly disagree ■ Disagree ■ Slightly disagree ■ Slightly agree ■ Agree ■ Strongly agree

Source: Crehan, Tournier, and Chimier (2019: 34), as adapted from Eskolta survey data (2017, unpublished).

In South Africa, however, interviews revealed that teachers do not feel sufficiently empowered in their daily work. Some of them reported that their agency was scaled back because of rigid curriculum planning and oversight of classroom practice, leading to a feeling of 'de-professionalization' and lack of control. This illustrates that although greater career opportunities can increase teachers' sense of self-determination, their feeling of agency must be analysed by taking into consideration other aspects of the teaching profession, such as teaching practices or school supervision.

Purposefully designed roles can foster teacher collaboration

Teacher collaboration depends on developing an environment where teachers can interact and learn from one another in a spirit of mutual support, without feeling that they are being judged or controlled. It is important to create a space in which teachers have greater access to shared resources and information, enriching their teaching content and methods (Moolenaar, 2012; Amersfoort, *et al*., 2011). A large body of research shows that teachers working in more supportive professional environments – i.e. where teachers collaborate to refine their teaching practices and work together to solve problems in the school – improve

their effectiveness more over time than teachers working in less supportive contexts (Kraft and Papay, 2014). This idea of peer collaboration connects directly to another human need that underlies autonomous motivation: relatedness.

In the countries studied, some of the new roles introduced as part of the career reform specifically aim at fostering collaboration and support within and across schools. This is the purpose of 'classroom' pathways, which provide experienced teachers with additional mentoring responsibilities. In the case of New York City, collaboration is a formalized goal. The introduction of the new roles illustrates a willingness to systematize collaboration: it is clearly mentioned as part of the responsibilities of Teacher Leaders. For instance, the role of the Peer Collaborative Teacher is precisely to 'promote a collaborative environment and support their colleagues through focused coaching, intervisitations [i.e. classroom visits], and designing meaningful opportunities for professional growth' (Crehan, Tournier, and Chimier, 2019: 11). Since the introduction of the new roles, Teacher Leaders and teachers report more collaboration with each other, whereas previously they had been rather isolated within their own classrooms. This collaboration happens through analysing student work to improve teacher practice; visiting a colleague's classroom to observe, learn, and discuss teaching practice; and attending professional development workshops offered by Teacher Leaders. Teacher Leaders explain that collaborating with others is perceived as motivating because it breaks with a culture of closed-door teaching, puts them in a rewarding position where they can help others, and stimulates their process of reflection.

> It's a chance to facilitate and help other teachers in their classroom. Not being on an island. I collaborate so much more with other teachers. It's made me a stronger teacher.
>
> Peer collaborative teacher, New York City

> It [working with a Teacher Leader] totally improved my practice. I love the way she does the discussion. It is awesome. It opens your eyes. I felt very isolated when I first started the job. I was craving another adult coming and telling me.
>
> Teacher, New York City (Crehan, Tournier, and Chimier, 2019: 35)

In South Africa and Ecuador, collaboration is not as formalized as it is in New York City. In South Africa, although schools are incentivized through the evaluation process to develop and participate

in professional learning communities, collaborative practices still appear to be limited in practice. Teachers reported that collaboration is often reliant on the culture of the individual school. Nonetheless, the teachers interviewed emphasize that good collegial dynamics play an important role in improving teachers' perceptions of their working conditions. The South African case also shows that the limited number of promotion opportunities available due to budget constraints creates greater competition among teachers and demotivates them.

In Ecuador, the introduction of a new criterion-referenced appraisal process (in which every teacher who meets the requirements is promoted, meaning there is no threshold) and the related professional development requirements have led teachers to collaborate more with each other. One teacher said, 'Here when we go to a workshop … we do study group, we help each other … colleagues with a little more experience come and explain us and this has been rather useful for these tests, these workshops' (Chiriboga Montalvo and Pinto Haro, 2019: 55). However, this research shows that teachers do not spontaneously associate the teaching career reform with collaboration.

Overall, these findings show that teacher career reforms have the potential to strengthen collaborative working practices among teachers. Yet, to do so, policy-makers should consider introducing collaborative features into the early design of career ladder roles and evaluation procedures.

Professional development plays an important role in teacher career growth if designed properly

Teachers find another source of autonomous motivation through mastery of their craft, measured in this research through a proxy indicator of CPD. CPD can refer to a wide variety of techniques, including external training and degree programmes, mandatory in-service training, or internal peer collaboration and mentoring. No matter the method, CPD serves to improve teaching techniques and quality of instruction while also autonomously motivating the teacher, despite being externally mandated. Emerging teacher career reforms unsurprisingly place a strong emphasis on CPD, either through the introduction of support roles within schools, or through new requirements for career progression and professional development programmes.

Effect of new roles on teaching practice

The initial focus of the TCP programme in New York City was to increase opportunities for professional development and improvement of teaching practice. Survey and interview results show that the career pathway is not only having a positive impact on the professional development of Teacher Leaders, but also on the teachers who work with them. A significant majority of teachers report that their teaching practice has improved as a result of working with Teacher Leaders, although this is more likely to happen if the Teacher Leader works with them more than once a month. Principals confirm this trend, and 91 per cent of respondents agree to some degree that 'having Teacher Leaders in our school last year helped me to build instructional capacity' (see *Figure 3.3*).

Figure 3.3   New York City school principals on instructional capacity

'Having Teacher Leaders in our school last year helped me to build instructional capacity' (n = 245)
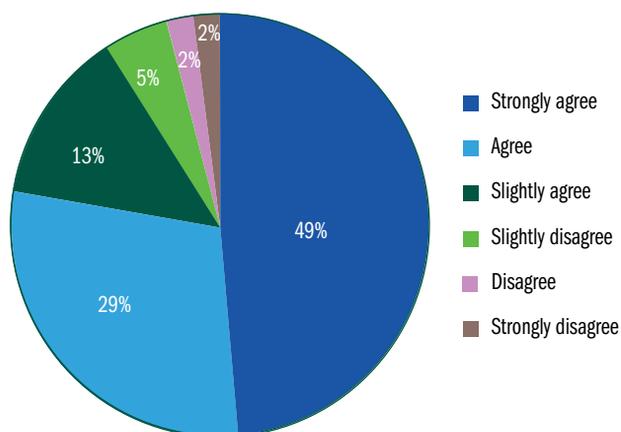
Source: Crehan, Tournier, and Chimier (2019: 36), as adapted from Eskolta survey data (2017, unpublished).

In Ecuador, in spite of the very limited number of new roles occupied by teachers (*Table 3.1*), a significant number of those surveyed report positive effects on the introduction of activities related to improvements in teaching practice. These include things such as the exchange of materials and good practices, feedback, collaborative professional development, or collegial activities across classes (see *Figure 3.4*).

Interestingly, *Figure 3.4* highlights teachers' appreciation of activities that combine professional development and collaboration between colleagues. When implemented in a collaborative manner, CPD facilitates both the need for competence and for relatedness. This corroborates the findings of the New York City case study, which revealed that teachers not only appreciated the fact that the TCP programme contributed to increasing their teaching abilities, but also considered collaborative training sessions led by Teacher Leaders as key.

Figure 3.4   Effects of new roles on teachers' work in Ecuador (n = 267)

	Affects positively	Does not affect	Affects negatively	I don't know	No answer
Receive assistance for the daily teaching work	34%	34%	11%	18%	7%
Exchange of materials and good teaching practices between colleagues	51%	31%	3%	10%	6%
Join activities between different classes and age groups (e.g. projects)	40%	37%	7%	11%	5%
Team meetings	45%	32%	4%	9%	10%
Participate in collaborative professional learning	46%	34%	3%	10%	7%
Provide and receive feedback	46%	34%	3%	18%	6%

■ Affects positively ■ Does not affect ■ Affects negatively ▨ I don't know ▨ No answer

Source: Adapted from Chiriboga Montalvo and Pinto Haro (2019: 55).

Linking continuous professional development to career progression

In Ecuador and South Africa, teacher career structure reforms have introduced new requirements and programmes in terms of CPD. Although teachers highly value the increased focus on their professionalization, their perceptions, especially in South Africa, are undermined by design and implementation challenges.

In Ecuador, teachers must take part in training programmes in order to apply for a promotion. Teachers reported that they appreciate how the new career structure provides incentives for professional development. When asked about the main strengths of the new career structure, 27 per cent of surveyed teachers ranked first 'training, capacity building, professional development' (Chiriboga Montalvo and Pinto Haro, 2019: 43). Non-teaching staff, such as school principals, explained that they value the introduction of specific training programmes that help

them succeed in their new positions, as well as becoming familiar with the education reform as a whole.

> [Appraisal requirements] incentivized me to develop, acquire knowledge, investigate; it made me realize whether I needed to develop each of my duties. I really liked it because although I had bad nights and everything, I liked to investigate the topics, learn what I did not know.
>
> Teacher, Ecuador

> The process is very good, in particular the appraisal, because it helps us see how far we have made progress and it helps setting bigger objectives to achieve the level of education. It helps us diagnose the weaknesses we have in education, the issues we'd have to focus on in training.
>
> School principal, Ecuador (Chiriboga Montalvo and Pinto Haro, 2019: 50)

While teachers appreciate that promotions are no longer discretionary, but are based on clear professional requirements, they also complain that these new requirements add around 300 hours of extra workload. This leads to some of them abandoning the training, which results in other problems, as the number of places on some online training programmes are very limited, amounting to only 460 for an online master's degree in 2017.

In South Africa, although all teachers must go through a three-year professional development cycle, it is not explicitly tied to the teacher career structure. Teachers are frustrated that the high value afforded to CPD as part of their professional duties does not translate into promotion and salary progression opportunities. One senior policy-maker in South Africa stated, 'The current CPD system has no punitives [*sic*] and no rewards'; 'Teachers cannot see the intrinsic value of … CPD. For them it must be linked to rewards of sorts' (Sayed and de Kock, 2019: 39). It is worth explaining that South African teachers' attitude towards CPD is grounded in the fact that, under the former system, upskilling resulted in movement to a higher salary level. This example underlines the importance of understanding context and historical legacy in designing a new professional development system.

In addition, the CPD system is not administered consistently across all South African schools, districts, and provinces. The case study indicated that wealthier and larger schools provided more CPD opportunities to teachers than smaller schools with more limited budgets: 'There is a limit on the amount of support we can offer teachers because

of the budget. … We try to arrange it so that different teachers are prioritized in the funding pool each year' (school principal, interviewed in Sayed and de Kock, 2019: 39). These contextual discrepancies explain why 57 per cent of interviewed teachers indicated that they were uncertain if CPD was actually available to them. Despite this frustration and mixed perception, CPD in South Africa is perceived by 59 per cent of interviewed teachers as an important driver of good practices.

Career reforms have mixed effects on teacher attraction and retention

Another way to approach the link between career structure reforms and teacher motivation is by looking at the perceived attractiveness and willingness to remain in the profession.

Attraction

Because of the multiple factors that contribute to the attractiveness of the teaching profession, as well as specific factors that are related to each country case study, this research was unable to provide a clear picture of the effects that career schemes have on the appeal of the profession. Some findings are nonetheless worth highlighting.

In New York City, school principals have mixed reactions to the question of whether participating in the TCP programme helps them to attract staff. While 52 per cent agree or strongly agree that it does, and a further 18 per cent 'somewhat' agree, the remaining 30 per cent do not think that the programme has such an effect (see *Figure 3.5*). A school principal explained that she does not offer Teacher Leader positions to new staff because they first need to understand the context: 'I don't think it's a carrot, I don't think it makes an impact [on attraction]. This is my third year with the programme, we've used in-house folks rather than from outside' (Crehan, Tournier, and Chimier, 2019: 40). On the other hand, another principal thinks that it is helpful in attracting even for those who are not joining as Teacher Leaders: 'It is the culture of Teacher Leadership that attracts and retains everyone, not just the people who get those titles' (Crehan, Tournier, and Chimier, 2019: 40).

In South Africa, there are mixed views on the link between the high increase in teacher applications over the last decade and the teacher career reforms. Prospects for career progression are flagged by 45 per cent of participants as positively influencing their entry into the profession, while a further 40 per cent report this had no influence on their decision

Figure 3.5   School principals on teacher attraction in New York City
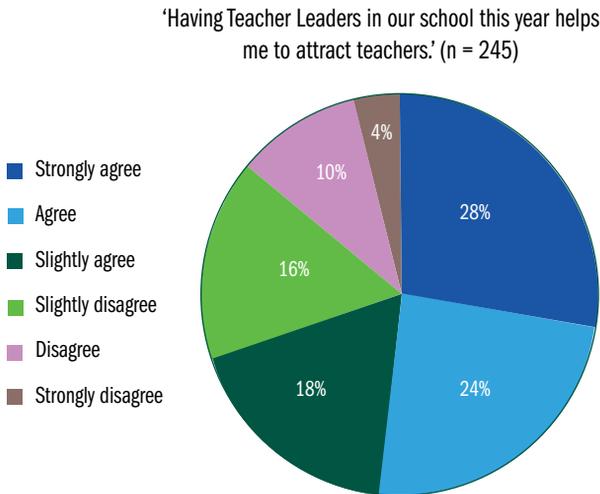
'Having Teacher Leaders in our school this year helps
me to attract teachers.' (n = 245)

- Strongly agree
- Agree
- Slightly agree
- Slightly disagree
- Disagree
- Strongly disagree

Source: Crehan, Tournier, and Chimier (2019: 40), as adapted from Eskolta survey data (2017, unpublished).

to become teachers. The increased number of candidates for the profession might be partly explained by the government campaign promoting the teaching profession, a comparatively high starting salary, and the establishment of the Funza Lushaka bursary scheme in 2007. Although the increasing number of candidates for the profession has allowed the system to be more demanding when it comes to application requirements, concern is expressed about the quality of graduates entering the profession. Candidates' entry scores are generally lower than for more prestigious professions such as law or medicine. One school principal reported: 'The Department [of Education] needs to work harder on recruitment to attract the best, not just those that are available. Up to 10 per cent of our Grade 12s are applying for teaching so there is movement into the profession, but now we need to think about how to lift its profile' (Sayed and de Kock, 2019: 42). Another principal shared similar concerns: 'We need more incentives for young teachers and for attracting the best to the profession. I look at those of our [Grade 12s] applying for teaching and they are not usually in the strongest cohort of students. Those students usually apply for programmes such as medicine, science or business degrees' (Sayed and de Kock, 2019: 42).

The majority of the teachers consulted as part of our research in Ecuador joined the profession before the introduction of the career reform, with only 17 per cent of those surveyed having joined less than five years ago. It is therefore difficult to draw clear-cut conclusions on the effect of the career reform on the attractiveness of the profession. While 31 per cent of respondents report that, to a certain extent, career advancement opportunities contributed to their willingness to join the profession, 48 per cent indicate that this had no influence, and 13 per cent were not aware of such opportunities. *Figure 3.6* highlights these responses.

Figure 3.6   Influence of advancement opportunities on teachers' decision to join the profession in Ecuador (n = 267)

Yes, absolutely	17%
Yes, to a certain extent	14%
This did not affect my decision to become a teacher	48%
I considered it as a small setback instead of something positive	0%
I considered it as a strong setback instead of something positive	0%
I was not aware of the professional advancement opportunities before I joined the profession	13%
I don't know	6%
No answer	2%
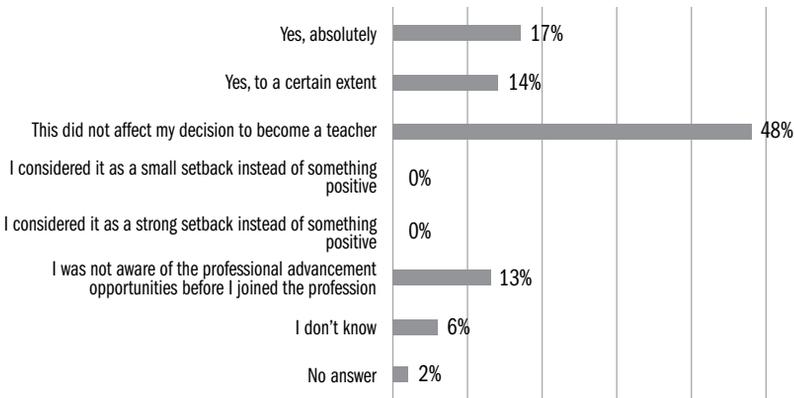
Source: Adapted from Chiriboga Montalvo and Pinto Haro (2019: 56).

Retention

When it comes to the effect of career schemes on teacher retention, the case studies indicate both positive results and the need to tackle implementation and contextual issues. Teachers' career aspirations are an important indicator of their motivation to stay in the profession. In Ecuador, 45 per cent of surveyed teachers wish to stay in the same position (either in the same school or in another school), while 37 per cent indicate that they wish to apply for another position in the education sector (new roles, management or administrative positions, and others), as shown in *Figure 3.7*. Although the teachers interviewed report difficulties in applying for new positions, 25 per cent of survey respondents indicate that promotion opportunities definitely contribute to their willingness to stay in the profession while 30 per cent say promotions contribute to a certain extent (see *Figure 3.8*).

Figure 3.7   Teachers' career aspirations in Ecuador (n = 267)

Stay in the current job	36%
Apply for a management or administrative position	16%
Apply for mentor teacher/student advisor/educational advisor/educational auditor position	15%
Keep the same position but in another school	9%
Occupy another position in the education sector	6%
Change profession	4%
Retire	9%
I don't know	2%
Other	1%
No answer	2%
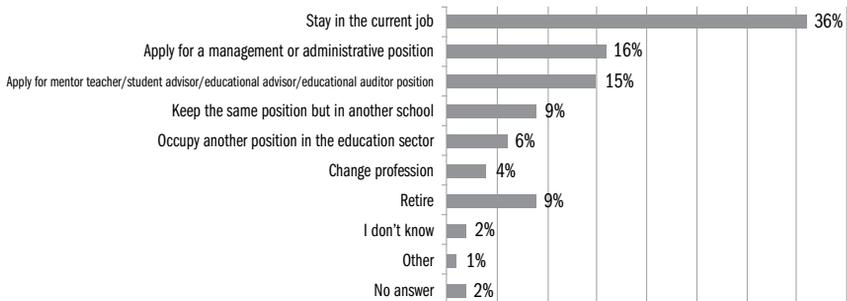
Source: Adapted from Chiriboga Montalvo and Pinto Haro (2019: 57).

Figure 3.8   Effect of promotion opportunities on teachers' willingness to stay in the profession in Ecuador (n = 267)

Yes, absolutely	25%
Yes, to a certain extent	30%
This does not affect my decision to remain	25%
It slightly prompts me to leave the profession	7%
It strongly encourages me to leave the profession	1%
I don't know	7%
No answer	5%
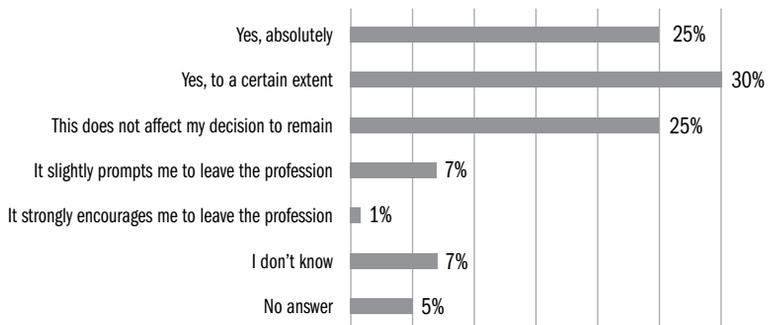
Source: Adapted from Chiriboga Montalvo and Pinto Haro (2019: 57).

In South Africa, *Figure 3.9* shows that even though 32 per cent of surveyed teachers wish to stay in the classroom (either in the same school or in another school), a total of 41 per cent are considering moving into other positions in the education sector, including management posts, or changing their career. This can be explained by the limited availability of promotional posts in the 'classroom' pathway, which provides incentives for teachers to move out of the classroom in order to access enhanced status and better pay. A school principal observed: 'I saw a teacher leave a school on post level 1 after 34 years of service when she could have been mentoring and doing that kind of work to improve practice' (Sayed and de Kock, 2019: 43). Interviews with South African teachers further

revealed that career advancement opportunities motivate teachers to stay in the profession, but the effect of the career scheme on retention is limited by challenges arising at different stages of a teacher's career. In particular, South Africa faces a critical problem of early-career attrition, as newly qualified teachers struggle with the realities of the school environment and leave the profession to seek other opportunities.

Figure 3.9   Teachers' career aspirations in South Africa (n = 128)
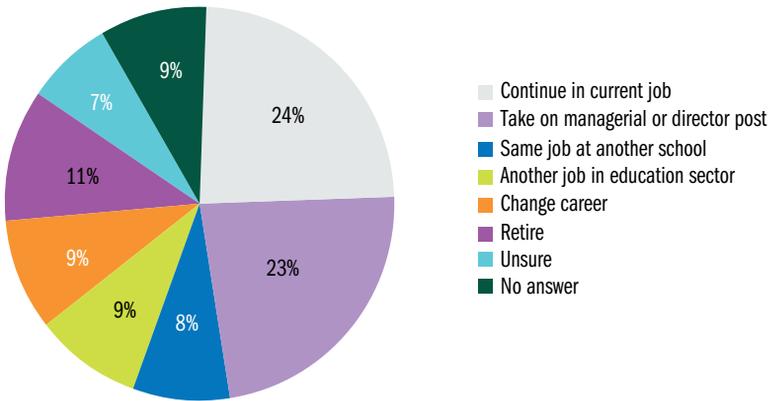
Source: Sayed and de Kock (2019: 44).

The New York City case provides interesting insights on the effect of the TCP programme on school-level teacher retention. The school principals surveyed are extremely positive about the effects of the programme on retention, as 81 per cent of them report that it helps them to retain their best teachers (see *Figure 3.10*). A DoE official explains that the numbers of Master Teachers are rising because principals use the awarding of this position as a retention tool for their best teachers who may be looking to leave: 'Principals are saying "Hey, you're about to leave me to become an AP [assistant principal], please don't leave, be a Master Teacher instead. You get $20,000, you get to keep teaching, which you love to do, let's make this work"' (Crehan, Tournier, and Chimier, 2019: 41).

Survey data reveal that the programme appears to be having positive effects on Teacher Leaders' retention at the city level, too. From 2014 to 2015, 1,011 Teacher Leaders were matched with similar teachers and tracked to see who returned to work in New York City schools the following

Figure 3.10 School principals on teacher retention in New York City

'Having Teacher Leaders in our school this year helps me to retain my best teachers' (n = 245)
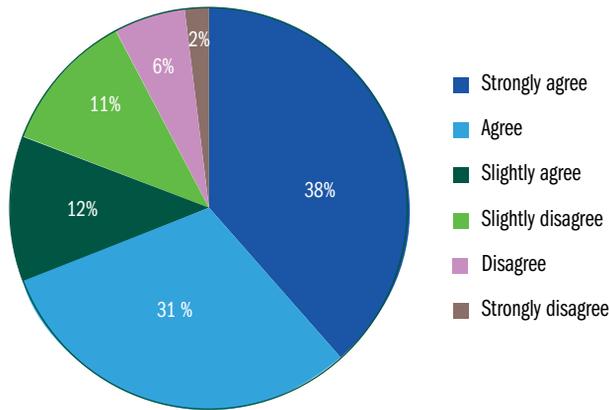
Source: Crehan, Tournier, and Chimier (2019: 40), as adapted from Eskolta survey data (2017, unpublished).

year. While 89 per cent of matched teachers remained in the city, 98 per cent of Teacher Leaders remained in the system, an increase of 9 per cent. This is significant because there is a financial draw for experienced teachers to move out of the city where the cost of living is lower. One teacher explains: 'As a guy who lives in the suburbs, New York City is almost a farm system. This programme is good because it retains teachers. In my city, teachers are paid more' (Crehan, Tournier, and Chimier, 2019: 40).

In addition to improving the retention of experienced teachers who have a Teacher Leadership position, survey data show that teachers who work with them are more likely to be committed to teaching and to their school, especially if they are in contact with Teacher Leaders more than once a month. *Figure 3.11* illustrates how much more valued teachers feel when they work regularly with Teacher Leaders.

Figure 3.11 Teachers who worked with a Teacher Leader report stronger sense of value and commitment than those who did not (New York City)
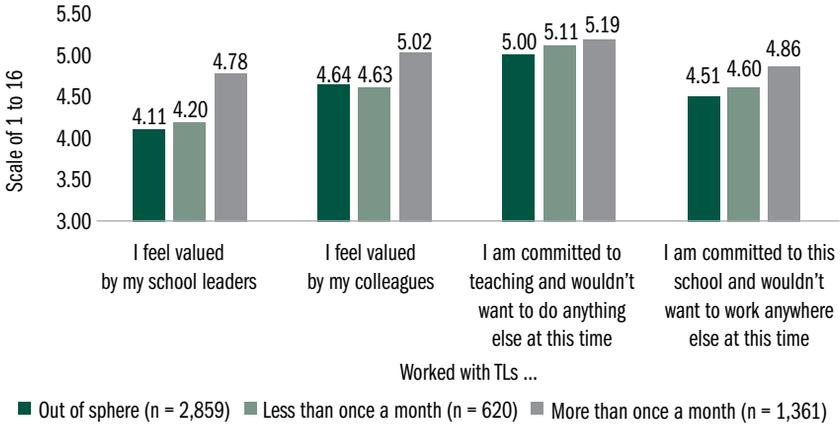
Source: Crehan, Tournier, and Chimier (2019: 41), as adapted from Eskolta survey data (2017, unpublished).

For career structures to yield positive effects on teacher motivation, enabling conditions need to be in place

While paying special attention to teachers' perceptions of the effects of career schemes on several factors that affect autonomous motivation, this research also revealed the essential role of contextual factors for sustained teacher motivation. The effects of teacher career structures on the profession are inextricably linked to the broader teacher management context of each country. Discussions with teachers showed that when basic conditions related to such things as salary or working conditions are absent or weak, career structures are unlikely to have a positive effect on teacher attraction, motivation, and retention.

This is in line with Herzberg's and Maslow's theories, which suggest that, in order for the career structure to yield positive effects on teacher satisfaction and autonomous motivation, 'hygiene factors'[11] or basic needs first need to be met (see *Table 3.2*).

---

11. 'Hygiene factors' are so named because they do not improve motivation, but if absent or weak they can give rise to dissatisfaction, just as a hygienic environment does not improve health but its absence can impair health (Herzberg, 2008).

Table 3.2   Herzberg's dual-factor theory

Four conditions	Low hygiene (poor working conditions and pay)	High hygiene (good working conditions and pay)
Low motivation (work does not fulfil 'higher needs')	This is the worst situation where employees are not motivated and have many complaints.	Employees have few complaints but are not highly motivated. The job is viewed as a pay cheque.
High motivation (work fulfils 'higher needs')	Employees are motivated but have a lot of complaints. A situation where the job is exciting and challenging but salaries and work conditions are poor.	The ideal situation where employees are highly motivated and have few complaints.

Source: Crehan (2016: 29) adapted from Herzberg (2008).

In conducting this research, the hygiene factors that were most frequently mentioned by teachers are salary, working environment, and job stability. It is worth specifying that this is not a comprehensive list. Many other factors have also been mentioned in this research and elsewhere, including status of the profession, transparent, fair and effective management, parental involvement, and more. The aim of this section is not to account for a full list of aspects contributing to teacher motivation, attraction, and retention, but rather to put forward the idea that teacher careers should always be analysed in a wider context.

Salary

A decent salary is undoubtedly a major pre-condition to attract the best candidates into the profession, and to motivate and retain teachers once in post. Studies have shown that underpaying teachers causes them to feel demoralized, lowering their motivation due to a lack of financial recognition (Bennell and Akyeampong, 2007: viii). Conversely, countries that have managed to keep the teaching profession attractive are those where salary levels are equivalent to other high-status professions.

The case of Thailand is illustrative in this regard. The new career structure was introduced along with a revised salary scheme separate from that of civil servants. Since 1988, teachers' salaries have been re-evaluated several times in order to be in line with salaries in comparable sectors as seen in *Figure 3.12*. This salary policy, combined with greater career advancement opportunities, is improving the attractiveness of the profession as well as teacher satisfaction and motivation.

Figure 3.12 Average monthly wages of individuals with bachelor's degree by level of experience – basic education teachers and other occupations in Thailand (2013 Thai baht)
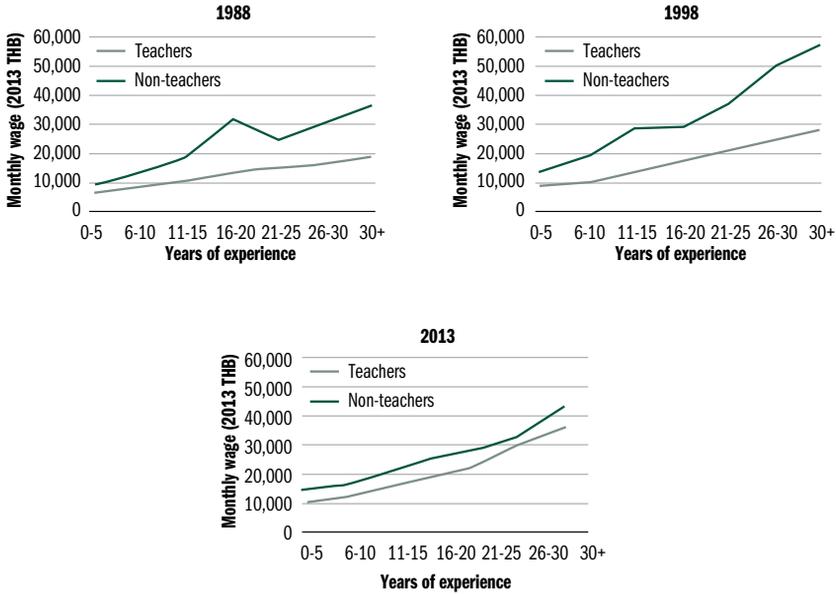
Source: Punyasavatsut (2019: 11) as adapted from World Bank (2015:14).

In Scotland, the teaching profession generally benefits from a high status, with special emphasis placed on aligning teachers' pay with that of comparable professions in the public sector. For instance, in 2001 teachers were awarded a salary increase of 23 per cent to bring their pay into line with salaries in other professions that required similar levels of education and skill. This was in response to a review commissioned by the government from a management consultancy firm and a call for evidence on the teaching profession, which found that teachers felt overworked and underpaid.

Other examples from this research confirmed the crucial need to secure basic salary conditions before investing in other motivation factors. In Ethiopia, while teaching used to be considered prestigious, it is now regarded as a profession of last resort. This is mainly due to the fact that, despite a salary scale revision in 2007, teachers' pay remains relatively low compared to other professions, such as health professionals (see *Table 3.3*). A representative from the Ethiopian teacher association observed that the teaching profession is perceived as 'the least attractive

one particularly by senior teachers since the incentives (the professional as well as financial rewards) are not comparable with other professions and their salary does not enable them to meet their basic needs' (Wossenu Yimam, 2019: 10).

Table 3.3 Comparison of teachers' and health professionals' base salary in Ethiopia

Professions	Position	Service in years	Base salary in Birr (in dollars*)
Health professional with diploma	Expert clinical nurse	8	1,514 (68.39)
Teacher with diploma	Associate lead teacher at primary school	12	1,476 (66.67)
Difference		4	38 (1.72)
Health professional with first degree	Senior expert nurse	10	3,150 (142.29)
Teacher with first degree	Lead teacher at secondary school or teacher training institute	16	2,211 (99.87)
Difference		6	939 (42.42)

Source: Wossenu Yimam (2019: 11), as adapted from Ethiopian Teacher Association (2008: 41).
* Using a conversion rate of 1 USD = 22.1382 Birr (02/09/2016).

In Ecuador, our research results show that salary is teachers' biggest concern in relation to the career structure reform. Teachers are worried that the reform might actually reduce their salaries, despite governmental promises to increase their pay. Although salaries increased with the introduction of the reform in 2011, they have been frozen since then. In addition, teachers report that the increase in salary is not consistent with the increased number of working hours (eight hours per day, including six contact hours), which usually implies working two shifts and prevents them from taking a second job. As summarized in the Ecuador case study, 'As long as teachers and society perceive that remuneration is lower than for health workers or security forces (socially undervalued in Ecuador), any effort to reposition this profession will be futile' (Chiriboga Montalvo and Pinto Haro, 2019: 78).

In Lithuania, salary issues also undermine teacher satisfaction and their overall appreciation of the career scheme. In a context of high emigration rates and low birth rates leading to school closures, teachers' salaries – which are based on the number of contact hours – are decreasing.

In South Africa, our research revealed that high starting salaries in comparison with other professions boost teacher attraction. Nevertheless, teachers complained that an increase in experience is not often met with an increase in salary, reducing teacher satisfaction and compromising retention.

Working environment

Another important 'hygiene' factor is related to the working conditions in which teachers live on a daily basis (Tarek and Pál, 2018). In South Africa, focus group participants recognized that money was not the only factor influencing the quality of teacher practice and their level of investment in the profession. Teachers are also largely motivated or discouraged by the environments in which they work, as well as the organizational circumstances that enable or constrain their ability to work effectively (SACE, 2010). Our research in South Africa reveals the impact of the school environment on teacher motivation and stress levels, specifically linking problems to student violence towards teachers and poor infrastructure. Teachers also repeatedly complained about heavy administrative workloads linked to evaluation and examination processes. New entrants to the profession particularly suffer from unfavourable working environments, which negatively affect teacher attraction and retention in the early years of the career.

> Teaching is becoming dangerous. Students are becoming more rude and disrespectful and the Education Department supports the students.
>
> Teacher, South Africa

> With the conditions they work under teachers are really not motivated to perform at their best.
>
> Province official, South Africa (Sayed and de Kock, 2019: 40)

In Ecuador, teachers report that the career reform has not led to improved working conditions. They complain about poor infrastructure and a lack of material and teaching resources. The increase in working hours, which was a condition for the general salary increase, is actually perceived as a deterioration in teachers' working conditions because it reduces the time available for administrative tasks and professional development.

Job security

This research also identified job security as an important factor influencing teachers' perceptions of career structures. In many countries, the teaching profession traditionally guarantees employment stability and a secure source of revenue, which considerably boosts attraction to the profession. This is especially true in contexts characterized by scarce stable employment opportunities in the private sector. In Colombia, Mexico, Peru, and Thailand, teachers mention the job security traditionally associated with the profession as a contributing factor to its attractiveness.

On the other hand, this research also shows that offering high job stability is not powerful enough to attract the most capable and genuinely motivated teachers. In the aforementioned countries, many candidates participate in competitive examinations to become a teacher. However, many of them do not possess the minimum requirements and do not pass the entry selection. In Colombia, our research showed that some candidates apply to the teaching profession to seek job security, not because they are genuinely interested in a long-term teaching career.

In some countries, teacher career reforms were strongly resisted by teachers because they affected job security. Even though some teachers see the introduction of meritocratic recruitment, evaluation, and promotion processes in a positive light, others see a threat to their job security, especially where teachers can be dismissed for poor performance. Some teachers in Mexico support the introduction of merit-based career progression, while others strongly oppose the new reform, arguing that standardization is unfair and punitive. In Ecuador, some teachers also feel more vulnerable because of the possibility of being dismissed following bad evaluation results.

Conclusion

Promising career schemes are expected to motivate teachers 'from the inside'. Looking at the factors that affect teacher autonomous motivation, this research has found that, overall, teachers very positively welcome having more opportunities for career progression while still being able to stay in the classroom. Beyond agency over their professional mobility, teachers appear to be motivated by systems where their voices are heard and where they feel considered and valued as autonomous professionals. Having spaces and opportunities to collaborate between peers is

equally a key motivating force. Our research shows that collaboration is not automatically fostered by emerging career schemes unless it is clearly formalized through the career structure, for instance by giving experienced teachers the mandate and extra time to support their peers. It is all the more important to encourage teacher collaboration because it is a powerful means of fostering professional development and knowledge acquisition within schools. In the countries analysed, teachers greatly appreciated the stronger focus on CPD, either through the introduction of support roles within schools, or through new requirements for career progression and professional development programmes.

While the effects of career schemes on the attractiveness of the teaching profession appear limited, this research reveals a rather positive influence on teacher retention. Having more horizontal promotion opportunities contributes to teachers' willingness to stay in the profession. It also helps to keep the best teachers in the classroom.

In line with motivation theories, our research shows that career structures will not have a positive effect on the teaching profession if basic conditions are not met. In countries where salaries are not aligned with those of comparable professions and where working conditions are poor, the career structure is simply not teachers' main concern. This suggests that in order to strengthen teacher motivation, it is crucial to consider basic extrinsic factors before tackling intrinsic motivators.

Finally, teachers' perceptions of the effects of career schemes on their profession are significantly affected by design and implementation challenges. This will be further explored in the chapters that follow.

Chapter 4

Lessons on teacher career design and evaluation

When designing attractive and coherent teacher career structures, policy-makers must make a series of difficult decisions. These decisions are not only related to the number of stages within the career ladder and their associated responsibilities, but also to how these stages are related to the overall standards of the profession, the salary scale, and opportunities for professional development. Having made the appropriate choices, designers must further choose the appraisal methods to be used to determine how teachers progress along the newly designed structure. To do this appropriately, further options should be considered, including designing clear and fair evaluation criteria, determining numbers of teachers to progress through the system, deciding the appropriate evaluation tools to make these decisions, selecting internal or external evaluators, and separating formative feedback from summative assessments. This chapter presents key lessons on career design and evaluation systems based on the country notes and the case studies.

Lessons on career design

Using professional standards as a basis for the career structure design

Teacher standards can provide an overall framework for the design of a new career structure. These standards are a written public statement that specifies the attitude, knowledge, and skills that are expected from competent teachers and school leaders. Their main purpose is to foster a common understanding and vision of the profession among the education community. While teacher standards can remain general for the whole profession, they can also be differentiated based on specific teacher profiles, depending on variables such as level of education, area of specialization, or stage in the career structure. Teacher standards can therefore serve as a useful basis for the development of job descriptions that specify a clear set of responsibilities, tasks, and competencies at each point in the career. Furthermore, they provide broad guidelines that can

support the development and alignment of teacher recruitment, pre-service and in-service training, appraisal procedures, and career advancement opportunities (Muñoz, 2018; OECD, 2019; UNESCO, 2015*b*).

In Chile, the Good Teaching Framework (*Marco para la Buena Enseñanza*) has guided the development of teacher policy, including their updated career structure. Established by the Ministry of Education together with the association of Chilean municipalities and the national teachers union, it aims to set clear expectations for what teachers should know and be able to do. The Good Teaching Framework consists of a document structured around four domains: (a) preparation for teaching; (b) creation of an environment favouring the learning process; (c) teaching that fosters the learning process of all students; and (d) professional responsibilities. Each domain is then linked to corresponding criteria and descriptors. Descriptors indicate four levels of performance (outstanding, competent, basic, and unsatisfactory) that are directly used for teachers' competence evaluations. Apart from providing a framework for the teacher appraisal system, the Good Teaching Framework also helped structure the policy on initial teacher education, as well as the System for Teacher Professional Development (*Sistema de Desarrollo Profesional Docente*). As such, it offered a basis for the design of the entire new career ladder structure introduced in 2016, which aims to diversify teachers' roles within schools (Santiago *et al*., 2017).

The Chilean example illustrates the extent to which standards can act as a useful framework to distinguish the different components of the teacher career policy. The usefulness of teacher standards, however, is ensured only if standards are adapted to the context, are precise and well structured, and if they are accepted, with a sense of ownership, by the education community, including teachers themselves. An OECD review in several countries showed that the potential of teacher standards is not always maximized, especially in countries where teachers and school leaders are not fully aware of their existence (OECD, 2019). Thus, reform planners should develop explicit plans to incorporate professional standards into reform plans and ensure their wide dissemination.

Defining the number of stages and associated responsibilities in the career structure

When a country seeks to introduce greater differentiation between teachers through a career ladder system, a key step consists in the thoughtful design of every aspect of the new structure. Our research has

revealed the importance of carefully choosing an appropriate number of career stages and defining responsibilities for each of them, or else risking teacher frustration and alienation. This section then examines how to design pertinent roles and responsibilities and how to differentiate these within the different levels of the career ladder.

Initially, designers need to develop roles in line with the practical needs of teachers and schools. It is therefore important that the career design relies on an accurate diagnosis and understanding of these needs, which will help planners identify the key goals of the reform. New York City is an interesting example in this regard. During the design phase of the TCP programme, the DoE team in charge of the new reform spent time observing practices in schools. These observations, informed by pioneering literature on coaching and school transformation, shifted the programme's goals towards increased collaboration and distributive leadership. In light of this, the team dedicated considerable effort to refining the specific roles and reflecting on the value added of each one.

The number of distinct positions in a career ladder should allow for a clear differentiation in roles and responsibilities, while showing a natural progression correlated to increased experience and professional development. Scotland first implemented a career ladder that included too many career steps, with sometimes as many as seven levels of secondary school teachers. The distinctions between responsibilities and salary level of each position were not clearly defined and caused the system to become overly complex. As a result of an independent review, Scotland reformed its career structure and the seven career steps were reduced to four. In contrast to the overly complex secondary system, the career ladder for primary school teachers presented the opposite problem of having too few career steps. Officials also adjusted this ladder to four levels to create more management opportunities between the level of head teacher and teachers at the lowest levels.

In Ethiopia, by contrast, the number of steps proved insufficient for teachers and was increased from seven to nine. In this case, officials created more career steps not because of a need for more positions with differing roles and responsibilities, but in an attempt to further motivate teachers to seek professional advancement. These new career steps essentially originated as a function of increasing the number of levels in the salary scale rather than as an attempt to expand the roles and leadership of more senior teachers. While addressing an immediate

teacher concern in the present, this strategy might present a longer-term problem if it becomes too difficult to associate relevant responsibilities with the newly created career steps.

Ethiopia's example provides another important aspect of designing a career structure: the need for a clear definition of roles and responsibilities within the career ladder. Our research shows this as an essential, yet challenging, component of the design. In South Africa, the new positions created in the teaching and learning pathway of the career ladder lacked specific definition of responsibilities. Initially, the Senior and Master Teacher roles (later removed) were created so that schools could increase their capacity without moving experienced teachers out of the classroom. These teachers received a salary increase equivalent to those of deputy principals, but schools and administrators did not necessarily require them to take on a similar amount of responsibility. Senior and Master Teachers had differing interpretations of their responsibilities, and consequently their tasks varied significantly from one school to another. This confusion illustrates a lack of foresight in the design process with regards to the clear definition of teacher roles and responsibilities both at the design level and within the context of particular schools. In Lithuania, the career ladder also lacks a clear definition of roles and responsibilities in each of the more advanced levels of the structure (i.e. teacher, senior teacher, teacher-methodologist, teacher-expert). This presents a problem because, without clear responsibilities related to specific career steps, it becomes difficult to assess whether teachers' skills and abilities are improving as they move up the ladder.

Designing logical, coherent levels into a new teacher career model seems like common-sense advice to any policy planner. Yet, as the above examples illustrate, this process does not always prove to be as straightforward as it seems. Planners should fully consider the need to differentiate between teachers at each level of the career structure and develop a clear system that can fully define these roles and responsibilities.

Aligning teacher career structure with training and professional development opportunities

Teacher professional development is inextricably linked to teacher careers. A strong career structure is expected to support teachers and create incentives for them to grow as professionals. As a result, the completion of training programmes or the acquisition of additional qualifications is often a requirement for teachers to progress in their

careers, whether for a salary increase or a promotion. Aside from simply meeting promotion requirements, training also better prepares teachers to succeed in their newly designed roles with their added responsibilities. The high emphasis placed on professional development as part of career reforms has thus involved the creation of a number of training programmes, which is itself not without challenges due to resource constraints and lack of design foresight.

With clearly defined requirements to progress to each new step of a career ladder model, it becomes essential to ensure that all teachers can properly prepare to meet the professional development standards that a promotion entails. In Ecuador, insufficient training opportunities limit teachers' ability to progress in the salary scale by applying for support and management positions. Many teachers have not been able to follow an online training course on curriculum updates, which is mandatory for career progression. Teachers in Ethiopia complained of being unable to meet the expected research requirements to advance up the career ladder. In particular, they reported that they neither held the skills required, nor did they have enough time, given their workload, to successfully complete the necessary research activities.

The simple availability of training and professional development opportunities, however, does not necessarily guarantee their quality and relevance. In Lithuania, while the system provides a range of professional development activities, they are not always subject to systematic quality assessment, can be too short in duration, or not orientated towards long-term outcomes (Daciulyte *et al.*, 2012). In Mexico, the civil society organization Mexicanos Primero argues that the courses, training sessions, seminars, and workshops offered as part of teacher professional development are irrelevant to the teaching profession and disconnected from the challenges faced by teachers in adverse contexts (Calderón, 2016). They advocate better use of information derived from performance evaluations to design and sustain a comprehensive national programme of teacher professional development, which would involve not only courses, but also school-based collaborative learning opportunities.

In addition to ensuring that teachers have been given the opportunity to meet the requirements for promotion, career model designers should make certain that teachers receive adequate training to successfully enhance their new positions. In Ecuador, one of the tasks of the educational advisers (*asesores educativos*) is to provide guidance on

professional development programmes that meet teachers' and schools' needs. Mentor teachers provide training and coaching to teachers to enhance their professional development. Only general introductory training is given to support staff, however, with no specialized training adapted to each position as originally planned in the career reform. This lack of training, combined with an overall shortage of educational advisers and mentor teachers, in turn jeopardizes the continued training and support of teachers. Compounding this issue, the reforms in Ecuador did not consider the design of a comprehensive system of CPD for school leaders, contributing to further weaknesses.

In examining the above examples, policy planners should take special care to design a feasible professional development programme that aligns with the newly developed roles and responsibilities of career structures. Specifically, they should ensure that any requirements needed to advance to a higher position or pay grade are accessible to all teachers. Further, they should design systems that provide the support and training opportunities needed for teachers to excel in their newly defined roles. While a successful CPD programme can provide great support and benefit to teachers, a poorly designed professional development programme can merely increase teacher frustration.

Designing a coherent and attractive salary scale

Another essential component of teacher career design relates to the creation of a basic and common salary scale for all teachers. An optimal salary policy depends on several factors, including the characteristics of the demand and supply of teachers, the career structure, and the country's labour market, as well as the overall political and financial context. First and foremost, countries must ensure the competitiveness of teacher salaries. As discussed in *Chapter 3*, in order to attract and retain high-quality candidates, teacher salaries need to be aligned with those of professions with equivalent qualification levels. If students with similar qualifications can make considerably more money in another field, enticing top candidates into teaching will prove extremely difficult. Without competitive salaries that meet the basic needs of teachers, any other salary decisions are unlikely to yield positive effects on the status and appeal of the profession.

The distribution of salaries over the course of a teacher's career is the first key aspect to consider. On the one hand, as already mentioned, attracting strong candidates to the profession requires competitive starting

salaries (McKinsey and Company, 2007; Gannicott, 2009). On the other hand, countries are seeking to retain, motivate, and recognize experienced and competent teachers through progressive salary increases. Finding adequate increases in the salary scale might involve trade-offs, especially in countries with limited financial resources. Countries whose main goal is to attract high-quality candidates to the profession and mitigate early-career attrition might prioritize teachers' entry-level salaries, allowing the slope of the salary scale to plateau in later years. According to some research, this strategy's adverse effects on teacher retention are limited: 'since teacher retention is generally not correlated strongly with salary progression, teachers committed to the job will stay even if mid-career salaries are not as attractive as elsewhere' (Gannicott, 2009: 63). The case of the Western Cape in South Africa, however, demonstrates that prioritizing salaries in the early years of the career does not prevent mid-career attrition. While the starting salary for a teacher is high relative to other professions, over time increased experience becomes more valued in terms of salary in many other professional fields. This affects teachers' level of job satisfaction, and some choose to leave the profession for better prospects (SACE, 2010).

This research also shows that it is important to ensure that salaries are commensurate with teachers' roles and responsibilities. In countries that are seeking to diversify the profession and to provide incentives for teachers to develop their skills, salaries must be calibrated to match their growing abilities. Some South African teachers participating in our research reported that they had not applied for promotion because the salary increase that a new post would bring did not correspond with the new responsibilities it would involve. In Ecuador, the salary difference between each scale is so small that some teachers expressed little motivation to make the efforts required to upgrade, which involve enrolling in graduate programmes or participating in professional development programmes offered by the Ministry of Education. In Peru, the difference in salary between the first and the last grade in the career structure had decreased until it became almost insignificant by 2012. This had a negative impact on teachers and discouraged them from seeking promotion. Teachers in Peru greatly welcomed career reforms in 2012 that addressed this issue and provided a more balanced structure with greater differentiation of salary between steps on the career ladder.

Finally, countries need to carefully define the length of service required for each grade of the salary scale. Several factors must be taken into consideration, including the level of seniority needed for a salary increase. For instance, if teachers must spend an extended period of time at each salary grade, it may prevent young teachers who meet all the promotion requirements apart from years of service from earning a pay rise or promotion. Peru provides evidence of this, as several interviewees stated that young teachers face just such an obstacle in their system. As shown in *Table 4.1*, the minimum amount of time teachers must spend at the first two levels of the *escala magisterial* (Peru's salary progression based on appraisal model) is three and four years, respectively. This prevents young teachers from earning salary increases before reaching those minimum years of service, no matter their performance level. The Lithuanian case also highlighted that long waiting times for promotion opportunities may discourage young teachers and detract from the overall attractiveness of the profession. Though their system still offers two salary increases based on a single salary schedule, they only come after 10 and 15 years of service. The career ladder portion of the system offers some further options, but young Lithuanian teachers must wait four years before even applying to earn their first promotion and related salary increase.

In contrast with the Peruvian and Lithuanian examples, if teachers progress through positions too quickly, then the salary spine can no longer provide attractive long-term career prospects. In Ethiopia, the length of service required between the fourth and the seventh career steps was reduced to three years instead of four. Policy planners also added more steps to the ladder, showing that their aim was to expand the model and allow for quicker advancement through the steps. Although this new structure pleased teachers, who were eager to advance up the ladder because of very low starting salaries, it did not solve the problem of inadequate pay in the long run. The danger of moving too fast through a salary scale should not be overlooked: by the age of 40, the average teacher in the current Ethiopian system reaches the top position with no further advancement available. Thus, teachers at the top of the pay scale become demotivated with no other opportunities for career or salary growth. A balance needs to be found in determining the length of stay required at each salary grade before being able to move to a higher level: it should not be so long that it discourages teachers, especially the young ones, nor so short as to defeat the purpose.

Table 4.1   Years of teaching experience and duration of service at each *escala magisterial* level in Peru

Level	Duration of service at each level	Years of experience needed
I	3 years	3 years
II	4 years	7 years
III	4 years	11 years
IV	4 years	15 years
V	5 years	20 years
VI	5 years	25 years
VII	5 years	30 years
VIII	Until retirement	35 years

Source: Mendoza (2019: 16), as adapted from MINEDU (2012).

Paying close attention to entry into the profession and early career stages

Well-designed reforms can have a positive impact on regulating entry into the teaching profession as well as giving essential support to new educators. Yet the design of effective entry requirements and procedures is a highly debated topic. There are significant variations across countries in terms of minimum qualifications, selection criteria, and entry requirements. For example, while some high-performing countries such as Finland implement rigorous competitive entry examinations, others such as Singapore do not (OECD, 2019). Less controversial aspects for planners to consider include designing purposeful support systems into career structures to better train and professionalize young teachers, as illustrated by the following examples.

In some of the countries studied, the teacher career reform brought major changes to entry requirements and selection procedures, with the aim of introducing a more meritocratic and transparent process. For example, in Colombia, the new career scheme requires teachers to hold at least one degree from a tertiary institution or a teacher-training school, whereas completion of upper secondary education was previously sufficient. The country also moved from a selection system dominated by nepotism to a fair and competitive entry examination. Thanks to this selection system, the new teacher career structure has improved the calibre of those recruited (Ome, 2012). It has also contributed to raising

the appeal of the profession and improving trust in the system. Similarly, in Mexico, the national examination to enter the profession (mandatory since 2008) has aimed to eliminate discretionary practices and corruption in the assignment of teaching positions.

Beyond the selection process, it is important to consider teachers' early years in the profession. Well-organized and supportive induction and probation periods, along with mentorship programmes, play a major role in professionalizing and retaining young teachers. In Scotland, probationers are guaranteed at least a full year of stable employment, meaning they can no longer be used for intermittent supply, as used to be the case. In addition, probationers only teach 70 per cent of a full timetable, leaving time for them to engage in mentorship activities and take part in other aspects of professional development training. This is said to have changed the way teachers think about professional development, setting them up for career-long learning.

Mentorship programmes can be valuable if equipped with high-quality mentors who accompany new teachers through the early stages of their careers (OECD, 2009*a*; 2013). Mentor teacher roles can also become integrated as an additional step in horizontal teacher career mobility. For example, the New York City TCP programme defines the role of Teacher Leaders as mentors to new teachers, and the role of Teacher Team Leaders as mentors to Teacher Leaders. In this way, schools take advantage of mentorship programmes both as opportunities for senior teachers to share their knowledge with new teachers and as opportunities for professional advancement. Similarly, certain new teachers in Peru participate in an induction period facilitated by teacher-mentors who are competitively selected in their region. Unlike in New York City, though, the position of teacher-mentor is not included in the pedagogical management track of the career ladder.

While high-performing education systems may debate the merits of entrance exams, our research shows that such requirements can be quite effective in improving systems that have experienced preferential or political selections in the past. Further, in our case studies, special guidance for mentorship and training for new teachers seems effective, with no examples of negative consequences noted. Designers should incorporate some measures of support for young teachers in any effective career design.

Getting it right for school leaders and managers too

While the professionalization of teachers has received substantial attention in recent years, including through career reforms, the education workforce beyond teacher level has received comparatively less consideration. Yet this research has revealed that the profile and performance of staff in teacher management positions at school and at administrative levels are key to the successful implementation of teacher career structures.

In several countries studied, the lack of set requirements and adequate selection processes for staff beyond teacher level have been reported as an issue. In Ecuador, district education officers are nominated by higher authorities and do not go through a competitive selection process, unlike teachers and school leaders. An Ecuadorian teacher complained about this double standard:

> [W]ithin the negative things that I see in the districts, is that in order to have the position [education officers] should also go through the process that we teachers go through. These positions are political, there are people who are not related to education and are occupying the positions and above all with a good remuneration, when the teachers go through so much and they accommodate them in the position they see politically convenient .

> Chiriboga Montalvo and Pinto Haro, 2019: 63

Although some of the countries studied have introduced stricter criteria and selection processes for school leaders, this is not the case everywhere. For instance, Ethiopia has no requirements for becoming a school leader, and school principals tend to be political appointees. Our research highlights that poor leadership and management skills hamper school leaders' capacity to handle the evaluation system effectively, adversely affecting the morale and commitment of hard-working teachers. In Colombia, head teachers are selected for reasons other than leadership and management skills, and in not benefiting from a professional development system they have difficulty implementing annual teacher performance evaluations.

Both the OREALC (Oficina Regional de Educación para América Latina y el Caribe) and OECD suggest that establishing separate career structures and salary scales for school leaders can support the recognition of their responsibilities and their professional growth, instead of considering school leaders' positions 'as a mere extension of the teaching

career' (OECD, 2019). It is therefore important to consider these career reforms beyond just the roles of teachers. In Peru, teachers can apply to the institutional management stream of the career ladder after three years of teaching. This is a separate path with distinct positions, including principal and director of pedagogical management. School leadership positions do not always benefit from a separate career path or salaries that are commensurate with their level of responsibility. Head teachers' and principals' positions are often considered as the highest positions that classroom teachers can aspire to within their professional careers at the school level, hence limiting opportunities for progression (OREALC, 2014; OECD, 2019). In Colombia, for example, the earnings of school leaders are often inferior to those of their teachers, despite a significantly heavier workload (Radinger *et al.*, 2018: 185).

Lessons on evaluation criteria and tools

Evaluation is often the most discussed and controversial aspect of these reforms because it relates to the sensitive issue of teacher performance and accountability. Even so, evaluation comprises a crucial aspect of second-generation teacher career structures. Under such career schemes, teachers are subject to evaluation at regular stages in their career to access higher salary levels or positions of responsibility. In countries where there was traditionally little differentiation between teachers, and career advancement was mainly based on seniority and qualifications, performance evaluation has introduced important and often contentious changes in teachers' progression through the profession. This section examines several issues that policy designers should focus on when designing the evaluation portion of a new career structure. Please note that the first four subsections of this part of the chapter refer to summative appraisals, or those used to determine salary progression, bonuses, or promotions. Only the final section will examine formative appraisal, which consists of the provision of feedback to teachers to improve their practice with no impact on career progression.

Setting fair and clear evaluation criteria for salary increases and promotion

When designing evaluation criteria for salary increases or promotion, policy-makers need to define clear markers with an appropriate level of difficulty according to teachers' roles and responsibilities at each stage of the career structure. This research shows that the criteria must be set high enough to confirm teachers' expectations of the value of moving to a

higher position or salary level, yet also attainable so as not to discourage teachers from seeking professional advancement. It is important that evaluation criteria not be perceived as depriving the majority of teachers from pay rises and professional opportunities, but rather as paths to attaining these goals. Designers should also develop criteria so that they clearly convey expectations and requirements, so all teachers understand the steps that lead to promotion.

In Colombia, for instance, the evaluation criteria for salary increases appear too high, which discourages teachers from attempting the evaluation procedure. On average, only 10 per cent of those evaluated achieve the minimum required score (80 out of 100). As noted by Bruns and Luque (2014: 257), 'teachers have been reluctant to pursue available incentives because of the perceived difficulty of the test, which to some extent defeats the purpose of offering a new path'. The high level of difficulty results in teacher dissatisfaction and a feeling of uncertainty towards the profession. As a result, a meagre 14 per cent of teachers participated in the 2014 evaluations, despite the attractiveness of the pay rise offered. In Ethiopia, Abebayehu Aemero (2005: 629) observed that 'the criteria are still incompatible with teachers' level of knowledge, readiness and capacity'. He also added that 'criteria that presuppose, for example, competence in research are very elusive given the type and level of training teachers have had in the Ethiopian context'.

Although evaluation criteria must be adapted to the teachers' profiles, that should not be at the expense of teacher quality. In Ecuador, a minority (between 10 and 15 per cent) of teachers from the previous career scheme have succeeded in meeting the criteria set for the re-categorization process. Our research indicated that although these teachers complained about the inadequacy of the evaluation criteria, these results are primarily illustrative of the low quality of the most senior staff. While the evaluation design process should consider feedback, especially from practitioners, new evaluations must also have a legitimate base level of criteria, or mediocre teachers will advance and the system will lose its credibility. Moreover, evaluation criteria that are too low can lead to a number of problems, including the budgetary implications of granting all teachers a salary increase, reduced programme credibility, and disincentives for teachers to improve, as the salary increase becomes an expectation instead of an accomplishment (Vegas, 2005).

In addition to the difficulty level, the clarity of evaluation criteria is a key factor for the smooth, fair, and consistent implementation of teacher evaluations. In South Africa, the performance appraisal instrument is perceived as difficult to understand and confusing, which has led to different interpretations of the evaluation criteria among schools, districts, and provinces. As a result, some schools design their own appraisal tools, raising questions of objectivity, fairness, and appropriateness. Clear criteria also help teachers and staff members to better understand their new roles and responsibilities when moving up to a new position. In Mexico, our research highlights that one of the most problematic aspects of the teacher career model is related to the complexity of the profiles, parameters, and indicators that teachers are evaluated against. A National Institute for the Evaluation of Education (INEE) member explained: 'This is one critical area in which we need changes. The complexity is such that teachers are unable to clearly understand what we are evaluating and how' (Ortega Salazar, 2019: 21). In New York City, an initial version of the reform lacked accountability and a solid method of evaluation of Teacher Leaders, causing lots of frustration. The updated programme incorporated a constant evaluation cycle, and required Teacher Leaders to requalify every two years, no matter how actively they had been participating in the role.

Determining the number of teachers who progress through an evaluation cycle

After establishing fair and clear criteria for teacher evaluations, policy designers must decide on a suitable method for determining how many teachers are selected for advancement. While several variations can develop with regards to specific contextual needs, planners broadly can select either a criterion-referenced or norm-referenced system of evaluation. In a criterion-referenced system, any teacher who successfully complies with minimum required standards is awarded a promotion or a salary increase, irrespective of the performance of his or her peers. For a norm-referenced system, teacher promotion and salary increases depend on the performance of other teachers, as only top performers will receive the upgrade. Both strategies have positive and negative aspects, as indicated by the following examples.

Looking at the criterion-referenced evaluation method, prior research shows that it does not undermine teachers' cooperation and can foster collaboration, as promotion or salary increases do not depend on

the performance of their peers (OECD, 2009*a*; Crehan, 2016). Teachers are therefore more in control of their career progression than in a norm-referenced system. However, the results of these positive aspects have only been indirectly observed in the selected countries. As mentioned in *Chapter 3*, Ecuador introduced a new criterion-referenced appraisal process that coincided with supporting professional development requirements. While increased collaboration cannot yet be tied directly to this criterion-based evaluation, early indications show that this design has allowed teachers to collaborate more with each other than in earlier schemes.

Establishing a criterion-referenced system of promotion can also lead to great financial uncertainty in relation to salaries, as it is considerably harder to predict the outcomes of teachers' evaluations than simply progressing them along a single salary schedule (OECD, 2019). For example, Colombia utilizes a criterion-referenced promotion system, but to maintain a more stable budget, salary increases are established each year by the Ministry of National Education. This finite pool of resources causes evaluation designers to establish extremely high criteria for promotion, with only 10 per cent of those applying earning the score required to advance. Some schools in Lithuania have faced similar difficulties in paying their teachers, as financial resources come from municipalities that have not fully anticipated the increased number of higher salaries due to criterion-based promotions.

Our research found that further complications from criterion-referenced systems stemmed from difficulties in ensuring that all teachers meeting the stated criteria actually progressed as designed. Even though evaluations are criterion-referenced in Lithuania, teachers are sometimes discouraged at the school level from undergoing the evaluation for promotion, because of the lack of financial resources mentioned above. In Ethiopia, various types of malpractice have been observed in teacher promotions, including school principals and/or district education officials refusing to promote eligible teachers due to political or other unrelated issues. Moreover, in some Thai schools, not all teachers who passed the evaluation got a pay rise due to the malpractice and mismanagement of principals. In all three countries, this considerably reduced trust in the established promotion mechanisms.

In contrast to the criterion-referenced model, some countries instead address fiscal predictability by implementing norm-referenced evaluations where only a predetermined proportion of teachers get a promotion or

salary increase. Peru instituted such a system in which the Ministry of Economy and Finance determines exactly how many teachers can receive a promotion by both region and level of the career ladder. Unfortunately, due to the newness of the structure and other implementation issues in the reforms, the subsequent effects on teacher collaboration proved indeterminate for this study. Mexico instituted a similar policy, as salary progression depends strictly on the financial resources available and only the top-ranked teachers earn a pay rise. In each year of analysis, however, every teacher who was eligible for a promotion received one, and thus the system acted more as a criterion-referenced than a norm-referenced model. Looking at the literature beyond this study, observations from Portugal indicate that norm-referenced evaluation modalities contributed to increased teacher competition and a decrease in student results (Martins, 2009 in Crehan, 2016). While this evaluation methodology allows officials to better control the costs of the career structure, when teachers all compete for the same position it can cause issues. Specifically, 'promotion of competition among teachers or groups of teachers can lead to a breakdown in the collegiate ethos, thereby reducing rather than increasing performance' (OECD, 2009*a*: 67).

Overall, a norm-referenced system is more likely to lead to decreased collaboration among teachers and a limited sense of self-determination, whereas a criterion-referenced system may encourage responsibility, autonomy, and interpersonal relationships. However, policy designers must weigh the benefits of a criterion-referenced system carefully against the financial stability that a norm-referenced system can bring. Further, these examples demonstrate that if the criterion-referenced method is chosen, then it is important to ensure that it will be possible to award a promotion or salary increase to all teachers who meet the requirements. If this is not the case, trust in the system is reduced and teachers become dissatisfied. One possible option is an approach that combines a norm-referenced system at lower levels of the career ladder – where teachers would otherwise be competing with their peers – with a criterion-referenced system for positions of higher responsibility. For these positions, candidates would be competing at district level, rather than at school level, which will not have the same damaging effect on relationships.

Combining several evaluation tools to assess teachers' practices

Methods of appraisal are also determined by the evaluation tools used to assess teachers' performance. The most frequently used instruments are

classroom observation, interviews with the teacher, teacher knowledge tests, teacher self-appraisals, and teacher portfolio analysis (OECD, 2013). 'Different methods are more appropriate for assessing different standards. For example, teacher tests are useful for evaluating teachers' knowledge of education theories or child psychology, whereas lesson observations are a better way to evaluate whether they are able to maintain good discipline' (Crehan, 2018: 13). *Table 4.2* further details various evaluation tools available to planners, with a brief description of each provided.

With the increased number of evaluations accompanying second-generation teacher careers, many countries have begun to use standardized evaluation tools, such as multiple-choice tests. Such evaluation tools have gained popularity among policy-makers for their expected efficiency and objectivity in assessing a large number of teachers. Some Latin American countries studied as part of this research have particularly embraced this evaluation method to seek greater impartiality in teacher selection and performance assessment.

While the use of standardized evaluation instruments facilitates large-scale assessment processes, classification, and ranking, they are highly criticized by teachers. Technical and design challenges often arise when first implementing mass evaluation tools, especially in countries with a large number of teachers to assess. Mexico encountered difficulties when informing teachers that they had been selected to undergo an evaluation due to the sheer volume of notifications they needed to send out. Peru has experienced major delays in its attempt to implement a new mass evaluation process because of technical and human resource limitations (see *Chapter 5*). In Ecuador, teachers complained about ill-designed questions and lack of time to complete their evaluations.

Our research has also highlighted the perceived importance of evaluating teacher activities in the classroom versus trying to gauge promotion status on a standardized test. In Lithuania, teachers reported strong dissatisfaction with the current evaluation system because they felt that evaluators did not give enough weight to classroom observation in the appraisal process. In Ethiopia, teachers believed certain evaluation criteria were not connected to the teaching and learning that took place in classrooms. Likewise, teachers regarded the criteria for obtaining chartered teacher status in Scottish schools to be overly academic and to insufficiently recognize good classroom practices. As a result, school administrators believed that many who earned the chartered teacher

Table 4.2 Various evaluation tools and their main features

Tool	Description
Classroom observation	This tool consists of an internal or external assessor observing a teacher's lesson and evaluating the teaching process. Very often predetermined guidelines or forms are used to assess various aspects of the teacher's work in the classroom. This evaluation tool is the most common source of evidence used in OECD countries (OECD, 2009a).
Interviews with a teacher	Teacher interviews are also widely used in appraisals. Very often they seek to discuss the teacher's efforts to achieve existing performance objectives or development goals and to what extent they have been met. These interviews can also lead to a more general reflection on the teacher's work, difficulties that are encountered daily, as well as other aspects (Crehan, 2016; OECD, 2009a).
Teacher tests	Certain countries employ a content or pedagogical knowledge test to verify the academic skills of teachers. Even if it is more frequently used in the appraisal for entry into the profession, in certain cases the summative teacher evaluation also relies on it.
Teacher portfolio	This tool consists of gathering evidence that illustrates the teacher's work inside and outside the classroom. It can include such elements as lesson plans, student work examples, teaching materials designed by a teacher, certificates attesting professional development activities, self-evaluation questionnaires, reflection sheets, etc. The particular item in the portfolio is often selected to appraise a given criteria or competence that is being evaluated.
Teacher self-evaluation	Teachers evaluate and reflect on their own performance as well as the personal, organizational, and institutional factors that have an impact on their teaching (OECD, 2009a).
Student results	Student results are not commonly used as sources of evidence for teacher evaluation (OECD, 2009a). However, in certain countries teacher appraisal does consider the results of students in standardized tests.
Surveys of students and parents	This tool is also less commonly used, at least among OECD countries (Crehan, 2016). However, in certain cases parent and student opinion expressed in surveys is taken into account.

Source: Compiled by authors.

status were not necessarily the best teachers, raising doubts about the validity of the programme. In Ecuador, teachers felt that the summative evaluation did not consider their particular circumstances and did not lead to improved teaching practices. Several interviewees suggested that the evaluation should take into consideration innovative practices that actually led to improved student performance instead of using only standardized evaluation mechanisms.

Based on this research, large-scale evaluation tools are not sufficient if implemented alone. The use of a portfolio analysis or classroom observation can help highlight teachers' accomplishments and increase the accuracy of evaluations. These tools should be used to recognize teaching skills and practices that a standardized examination would be unable to measure and assess. In Colombia, teachers' competencies used to be evaluated by a public national examination consisting of 100 multiple-choice questions. This system generated strong discontentment among teachers, who went on strike in 2015. A new diagnostic and formative evaluation system was subsequently introduced, with the aim of evaluating teachers' competencies in context, putting greater focus on classroom practice. This is largely based on the evaluation of a classroom video reviewed by a national and regional peer evaluator. In addition to video observation, other evaluation instruments include self-evaluation, results of the two latest annual performance evaluations, or a student survey. In Mexico, five different tools are used: a principal's report; a teaching portfolio; a standardized examination; lesson planning examples; and a content knowledge examination. Although more costly, an evaluation system that complements standardized tests with portfolios and reports may yield more accurate and fair results.

Moreover, this research has revealed the importance of striking a balance between administering a thorough evaluation, which can be very resource intensive and time consuming, and streamlining the process to avoid making it too burdensome for teachers. Excessive formalism and paperwork decrease teacher satisfaction and can reduce their desire to even attempt promotion. In both Thailand and Lithuania, teachers reported that the amount of paperwork deters them from seeking advancement. Likewise, in South Africa, evaluations required for a salary increase or promotion are considered time consuming, bureaucratic, and involving too much paperwork.

Designing appropriate evaluation tools proves a challenging endeavour, as this research indicates that teachers were never fully satisfied with the instruments available. While there is no single right answer to this question, countries should strive for a balance of time-efficient standardized evaluation with more holistic tools that capture a comprehensive picture of teacher performance. Contextual considerations, including resource availability and even the level of the teacher being evaluated, can all potentially affect the appropriate tools

for evaluation. Policy planners should carefully consider these options to provide the most effective balance of evaluation tools.

Identifying internal and external evaluators

The quality of the appraisal process very often depends on the choice and quality of the evaluators. The key issue revolves around selecting evaluators who are internal to the school (i.e. school head, members of the school management team, peers, etc.) or external evaluators (i.e. inspectors, auditors, principals and teachers of other schools, regional authorities, etc.) to ensure best evaluation practices. Most frequently, teacher appraisal combines both internal and external evaluation elements to make the judgement more impartial and reliable, as compared with settings where only one agent is responsible for the evaluation. Several researchers recommend that more than one person should be involved in judging teacher quality and performance (Peterson, 2000; Stronge and Tucker, 2003). Gathering evidence about a teacher's practice from multiple sources helps to ensure accuracy and fairness, given the complexity of what it means to be a 'good' teacher. However, using multiple evaluators demands considerable time and resources (Danielson, 2007; Peterson, 2000; OECD, 2013).

Most countries included in our research use internal evaluators, in part because of convenience and in part because of costs. Principals, teachers, and other administrators who serve as internal evaluators may be better equipped to evaluate teachers because they are familiar with the school and its staff. On the other hand, their participation in the process raises concerns over objectivity and interference with the evaluations. In general, principals tend to give higher scores to teachers in order to avoid internal conflicts, as evidenced in Colombian schools. In Ethiopia, principals have been accused of lacking leadership in and commitment to teacher evaluations, leading high-performing teachers to believe their work is not taken seriously. Teachers serving as evaluators for their peers also raised concerns that they are not familiar enough with another teacher's work and might judge it unfairly. Similarly, in Lithuania, the fact that teachers often know their evaluators raised questions about the subjectivity of the process, calling for greater objectivity with the use of evaluators at the municipal and ministry of education levels.

In contrast to conducting internal assessments, external evaluators bring their own advantages and disadvantages. Perhaps the greatest advantage is the increased uniformity in applying evaluation standards

across the country, as internal assessments mean that each school does things slightly differently. From a negative standpoint, these outside evaluators risk overwhelming schools with high financial costs. Mexican schools rely on external evaluators (principals and teachers from different schools) who work in pairs to grade subjective portions of the evaluation, such as portfolios and lesson plans. To ease the workload of these external evaluators, Mexican teachers' standardized examinations are graded automatically. Meanwhile, Lithuania used to employ a highly centralized evaluation system in the past, but, due to excessive costs, it has increasingly relied on internal evaluators.

No matter whether the evaluation is conducted internally or externally, the capacity and quality of the evaluators remains key. To this end, it is important that all those involved receive adequate information and training to make the most of the process. Developing skills and competencies for teacher appraisal across the school system takes time and requires a substantial commitment both from education authorities and from the main actors involved (OECD, 2013: 53).

Finding a balance and separation between accountability and support

Second-generation career structures place a strong emphasis on teacher accountability through mandatory performance evaluation. Nonetheless, this research shows that the support teachers receive from their colleagues and superiors is essential to their sustained motivation and professional growth. When designing career structures, it is therefore important for countries to strike a balance between accountability and the support teachers receive through more formative evaluations.

The New York City TCP programme strove to find this balance in a creative manner. Two years after qualifying for the position, Teacher Leaders must requalify, whether they have been actively serving in the position or not. A DoE official said of this rule, 'That's so, so key. It says to people if you're not doing the job you don't keep it' (Crehan, Tournier, and Chimier, 2019: 31). The strategy was born out of experience. In the lead teacher programme preceding the reform, lead teachers kept their roles indefinitely, but many did not continue to actively lead learning. The new requalification process addresses this by also acting as an accountability mechanism. The team in charge of designing the new programme also learned from previous experience that even teachers in leadership positions needed some form of support structure. According

to a senior United Federation of Teachers official, 'One of the biggest take-aways from lead teacher is that people need support, no matter who they are' (Crehan, Tournier, and Chimier, 2019: 19). Hence, a key element of the new programme is the group of Teacher Team Leaders who act as coaches and mentors to Teacher Leaders throughout the year. They provide job-embedded development with a curriculum they have developed using research-based practices they call the five areas of instructional leadership. They run training for both teachers and principals, and each works with several schools (but without universal coverage), visiting every few weeks to support Teacher Leaders.

Though such support and formative feedback are important aspects of teacher growth, summative evaluations used for career advancement tend to be prioritized over formative assessment in several of the countries studied. In Mexico, our research highlights that the summative purposes of performance evaluation undermined its formative aspect. A key aim of the teacher career reform was to evaluate teacher performance so as to provide professional development options according to individual results as a way of stimulating better practice and increasing student learning. However, the role of evaluation results in determining career progression obscured this central objective of the policy. Teachers expressed the desire that evaluation procedures would enable the design of stronger, more relevant professional development programmes and collaborative learning options. Similarly, in Colombia, Ecuador, and South Africa, formative assessment appears to be overlooked in favour of summative assessment.

Another important lesson from the New York City programme is the separation of formative feedback from summative teacher evaluation. Interviews revealed that an important prerequisite for Teacher Leaders' ability to gain teachers' trust is a clear message that they do not share what they discuss with school leaders. Teacher Leaders support other teachers as peers, not as evaluators who report to the administration. Clear frameworks for action and tools have been carefully designed for this purpose. A principal explained: 'It is peer support, not support coming from the administration or borough. These are true colleagues. There is no evaluative measure to it. … I understand and I get that. When I was a teacher I would freeze up when I'd see my administrator coming in my classroom. You feel much more comfortable when a colleague comes to your office without a rating sheet' (Crehan, Tournier, and Chimier, 2019: 27). Teachers also undergo summative evaluations conducted by

administrators, which ensure formal accountability for their performance in the classroom. This kind of dual evaluation fosters a change of culture that promotes greater trust and collaboration among teachers, helping them to work constructively on their teaching skills all year round. In contrast, South Africa combined summative and formative assessments under the same system of evaluation. As a result, formative assessments have been superseded by summative evaluation processes. Lack of clarity and standardization in evaluation criteria have led to teacher confusion and the evaluation process has lost credibility.

Conclusion

Designing an attractive and coherent teacher career structure involves the complex task of defining and aligning teacher recruitment, pre- and in-service training, career advancement opportunities, salary conditions, and appraisal methods. There are many design options which often entail trade-offs. A strong teacher career structure must provide teachers with incentives to progress, offer accessible and relevant opportunities for professional development, ensure salaries are equivalent to professions with similar qualification levels, and generate conditions for support and formative feedback. Policy-makers hence need to carefully consider each component of the teacher career structure and make decisions according to their specific context, the goal of the reform, and the historical legacy of the teaching profession. Otherwise, implementation of the reforms may fail (see *Chapter 5*).

Chapter 5

Lessons on implementation of teacher career reforms

Implementing teacher career reforms is a substantial undertaking that requires planning and careful execution. This chapter shows how policy implementation is no less important than its design, as even the most well-conceived policies will fail without proper implementation procedures. It therefore discusses key challenges faced by the countries studied as part of our research when implementing new career structures. These include the need to secure financial, human, and technical resources; the importance of gaining teacher buy-in and involvement in the reform process; and the importance of investing in a comprehensive communication strategy. The chapter then demonstrates the value of careful planning for a smooth transition from one system to the next by adopting an adaptive approach to implementation, avoiding the tensions created by teachers having different career statuses in the long term, and, finally, by allowing time for a culture shift. As a reminder, the reforms in New York City differ from the other cases examined in this research, as they only added to the existing career structure and provided non-threatening changes for teachers to consider opting into. In the other cases cited, the entire career structure changed, thus raising the stakes and offering more direct threats to teachers' jobs and income security. While all these cases can provide important examples and input for future career design, policy planners and implementers should remember this distinction as they look to apply lessons to their own specific contexts.

> Well, the hard work is done. We have the policy passed; now all you have to do is implement it.
>
> Outgoing deputy minister of education to colleague (Fullan, 2016: 67)

Preparing for resource-intensive reforms

Reforming teacher career models is a resource-intensive task that demands strong financial, human, and technical capacity. This research has shown that in the majority of countries analysed, resource constraints were the major obstacle to the successful implementation of teacher career reforms. Some of the issues mentioned in this section link

directly to teacher career design (see *Chapter 4*), as the importance of understanding resource availability when designing new career systems cannot be overstated. However, this section focuses on the resulting implementation issues found in our research when resources, whether financial, human, or technical, were lacking for some reason in the selected contexts.

> Change is resource-hungry because of what it represents – developing solutions to complex problems, learning new skills, arriving at new insights, all are carried out in a social setting already overloaded with demands.
>
> Fullan and Miles, 1992: 750

Financial resources

Although this research did not undertake cost estimates of teacher career reforms, it has demonstrated that the introduction of more sophisticated career structures requires careful forward planning in terms of teacher numbers and salary implications. The diversification of horizontal and vertical positions available to teachers, combined with the design of more attractive salary schemes in several countries, has had an impact on the overall salary budget. In addition, second-generation career structures involve the use of performance evaluation systems that can impose significant costs on education systems. Adequate cost calculations and budget provisions prior to implementation are therefore very important for a smooth reform process.

In some of the countries studied, financial constraints have severely undermined the implementation of the teacher career reform, which badly affected teachers' trust and motivation. Funding issues regarding salaries are the most frequently reported, which can include such issues as salary freezes or lack of opportunities for promotion. In Ecuador, despite the announcement of an upward revision of teacher salaries as part of the reform, remuneration has remained frozen since 2012. Some Ecuadorian teachers are acting as head teachers without being compensated, and recruitment for newly created roles, such as mentor teacher, is restricted because the education system is unable to afford the associated salary increases. In Scotland, many local authorities decided to reduce the number of promoted posts and have fewer people in these roles, but with each post taking on more responsibility. An interviewee explained that it was a common decision to save money on promoted salaries rather than by cutting the number of teachers: 'Councils will face financial pressures. There is protection over the total number of teachers that are employed,

so if you need to make savings in education and you can't take it from teacher numbers, you take it from promoted posts' (Crehan, 2019: 20). The discontent among teachers due to the lack of promoted posts had led to a strike in one local authority at the time of this research. These examples show the importance of ensuring the possibility of awarding a promotion or salary increase to all teachers who meet the requirements. If this is not the case, trust in the system is reduced, teachers become dissatisfied and are discouraged from participating in career development processes, which ultimately reduces their effectiveness.

Salary increases and promotions that prove hard to forecast can also fuel financial limitations. As discussed in *Chapter 4*, criterion-referenced systems of evaluation can make budget and salary estimates particularly hard to predict. Regarding the chartered teacher programme in Scotland, all teachers who passed the designated external training modules would earn a salary increase, regardless of how many of their peers completed the same programme. Local authorities in Scotland had no control over the number of teachers who could participate and therefore no control over the increased costs, which in some cases became significant. These unexpected costs were a major reason for the programme's cancellation, with one union representative saying it 'was a political decision based on cost rather than educational principle' (Crehan, 2019: 25).

Yet another financial challenge is the significant role that resource inequalities across education systems play in reducing the effectiveness of teacher career reform implementation. In South Africa, individual schools can top up state teachers' salaries and they can hire additional teachers when funds are available. As a result, the wealthiest schools are more likely to be able to afford salary increases and promotions. Wealthier schools can also offer increased benefits and better facilities to highly skilled and qualified teachers by charging school fees, which poorer 'no-fee' schools are less able to do. Rural and urban schools can also offer vastly different opportunities for teachers. Due to less desirable locations and fewer resources, Peru struggles to fill vacancies in rural schools, while receiving an overabundance of applications to fill those in urban settings. Situations like South Africa and Peru result in a skewed distribution of skilled teachers that negatively affects poorer schools and causes greater differentiation of opportunities for promotion and professional development. To mitigate such issues, some countries such as Mexico have offered salary incentives for teachers to work in rural or highly impoverished locations. *Figure 5.1* shows the increased

percentages of compensation along the seven stages of the Mexican salary progression based on appraisal. At the time of writing, however, it was still unclear how effective these incentives have proved to be with regards to the attraction and retention of rural teachers.

Figure 5.1   Promotion by incentives: salary scale and incentives in Mexico (percentage rise relative to starting salary)

Higher level of incentive, higher level of performance required
Programme consists of seven levels with a percentage of assigned incentive
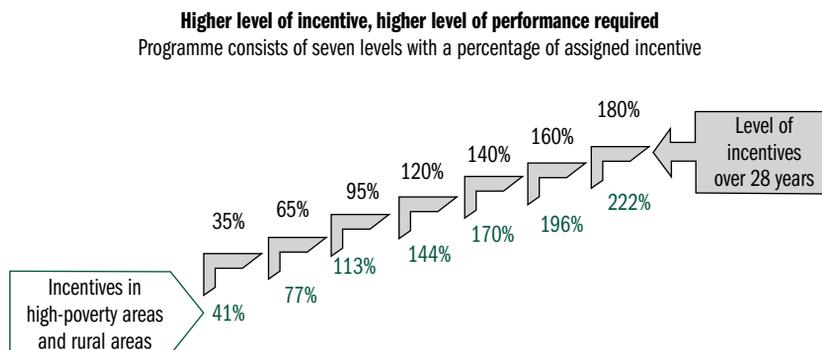
Source: Ortega Salazar (2019: 17), as adapted from SEP-CNSPD (2015).

New York City differs from the previous examples, but resource inequalities across different schools still play a crucial factor in implementation. Due to a lack of funding, some of the programme's qualified Teacher Leaders are paid as Model Teachers when they are working and fulfilling the responsibilities of the higher-paid position of Peer Collaborative Teacher (PCT). Some schools are unable to continue funding Teacher Leader positions at all. One school principal in New York City said about the programme, 'Financially, there's no way we could sustain it', while another said, 'That's the biggest problem with the programme, that schools have to self-fund. The TLs [Teacher Leaders] are $12,000 extra, Model Teachers $10,000 extra a year, which equates to an education assistant or another school aid' (Crehan, Tournier, and Chimier, 2019: 53). Thus, even reforms that seemingly find success in other aspects of implementation, such as New York City's programme, can still battle severe funding issues.

> I would be interested in continuing. I have several other teachers who would be great PCTs. The only problem is money. If I want to continue with this programme, which I think is great, I would be stuck.
>
> Principal, New York City (Crehan, Tournier, and Chimier, 2019: 53)

Resource inequalities among schools in some contexts also cause issues in providing equal opportunities for the CPD of teachers. While some schools or localities can subsidize CPD activities for teachers, or at the very least expand access to them using existing networks, others can only offer limited levels of support to their teachers each year. In Colombia, teachers are incentivized to seek advanced degrees in order to progress beyond a certain level of the career model. In addition, these degrees entail salary increases ranging from 60 per cent for a master's to 100 per cent for a PhD. However, they must pay for their own postgraduate studies and complete the work in their own time, leaving this path only available to those with the financial means to do so, and severely limiting opportunities for teachers outside cities and away from university programmes. In Thailand, teachers in rural schools face challenging work environments due to concerns with safety and basic infrastructure. This leads to challenges for teachers to develop professionally and provide the evidence-based work needed for promotion when compared with their urban colleagues.

Concerns about more equitable funding for new career programmes seem almost guaranteed to arise for any new policy design. While policy-makers cannot expect to find perfect solutions to these most difficult questions of financing and equality, careful planning around contextual issues and potential pitfalls should take place before facing the implementation challenges discussed in the examples found in this section. Whether it involves rural versus urban districts or simply wealthier versus poorer schools, planners should incorporate methods to distribute resources equally and ensure all schools, teachers, and students have equal access to the resources necessary for a quality schooling experience.

Human resources

In addition to merely needing increased funding, second-generation teacher career reforms also need effective human resources for the implementation stage to be successful. This research has specifically highlighted the issue of the ability of staff to implement the sophisticated evaluation systems required by these reforms. With reforms moving increasingly towards some type of accountability-based model that involves teacher evaluations, central authorities need to ensure that the personnel placed in charge of conducting these evaluations, be they at the school level (school principals, peers) or higher administrative levels, have the necessary knowledge, ability, and tools to conduct

them. Our research has shown that having evaluators with inappropriate or insufficient skills can lead to malpractice and ultimately to teachers becoming demotivated and mistrustful. In Mexico, it has been difficult to train enough evaluators and operational staff to implement the new teacher evaluation system. A lack of preparation has led to errors in the processing of applicants' documentation, in password distribution, and in orientation. In South Africa, the cascade model of training to implement the evaluation system appears similarly inadequate. As a result, government employees, education providers, school management teams, and teachers themselves do not have sufficient knowledge and capacity to effectively use and benefit from the new evaluation system. Ethiopia also struggles with evaluations, as the new structure has overwhelmed school leadership and they have struggled to effectively manage the system. All these examples have led to mistrust and resentment against the established systems of evaluation.

While assessment plays a key role in the new career structures, second-generation models also tend to involve more complex rules and procedures, and thus require continuous human resource support from the design stage and throughout its implementation. This research did not focus on the teacher development and support personnel who carry out these functions, and therefore lacks robust data to draw in-depth conclusions. Our research, however, did find one example that illustrated the difficulties faced when mid-level personnel lack the training or qualifications needed to carry out their duties. In Ethiopia, district staff reportedly denied or delayed promotion to teachers based on arbitrary factors such as ethnicity or political party affiliation. This eroded teacher trust in the system and negatively affected motivation. Further research is needed into this aspect of teacher career models to better understand the role and impact of intermediate support staff.

Technical resources

The management of teacher careers generates large information flows, including on issues such as teacher supply and demand, promotions, current staff trends, and future staff projections. This requires functional and robust information systems, with updated, reliable, and accessible databases. In order to build those databases, internal communications within the education system must be fluid. In Mexico, despite notable progress, databases appear to be incomplete, outdated, or inaccurate. This prevents administrators from having a clear picture of vacancies, greatly

reducing efficiency when organizing public calls to fill these positions. In Peru, the new evaluation system overwhelmed their technical resources due to the scale of the proposed changes. Previously, evaluations had not been mandatory, but the new system called for high-stakes evaluations of all teachers in order to determine retention and promotion statuses. With the size and complexity of such a system, it has taken longer than expected to properly mobilize all the necessary technical resources.

Well-designed and operational online platforms are also necessary, especially when they provide support for evaluation procedures. In Mexico, for instance, teachers must upload examples of lesson plans and other pieces of evidence as part of their evaluation. These platforms may also host training programmes, tutorials, guidelines, and online services. In Ecuador, teachers must complete an online in-service training course. However, they reported that the online platform is not always functional and some of them have little experience of using computers. Mistakes related to the online application process were also reported: some teachers must take the examination very far away from their home, and, in some cases, the examination is not even related to the subject they teach. Though these issues with technical resources directly correspond to limitations in financial and human resources, implementers should address any technical shortcomings so that stakeholders do not immediately dismiss a new programme as problematic or too complicated to succeed.

> Going from no evaluation to evaluating 1.5 million teachers involved significant implementation challenges, which were not adequately addressed and diminished the credibility of the evaluation.… For instance, the first in-service teacher evaluation took place in 2015 and evaluated more than 130,000 teachers. The evaluation was computer-based, and many locations lacked the minimum conditions: functioning computers, well-trained facilitators, clear instructions, among others. Under these conditions, the evaluations could take as much as 8 hours. The evaluation institute, INEE, improved the evaluation instrument in 2016 but the damage to the credibility of the evaluation was already done.
>
> World Bank blog on the reform in Mexico (De Hoyo, 2019)

Ensuring teacher buy-in and participation in the reform process

While the lack of financial, human, and technical resources played a major role in many implementation issues noted in this research, gaining the support of all interested stakeholders has also proved problematic.

With the shift in focus from job security and seniority-based promotion in the first generation of teacher careers to performance-based systems in the second generation, some teachers believe that career reforms threaten their job stability and security. Others believe government officials do not listen to their problems, and teachers in the field have no input into policy reforms that directly affect their career progression and livelihoods. The contentious nature of teacher career reforms combined with the power of teacher unions to oppose them raises the issue of how to build teacher support and buy-in. Engaging social dialogue between educational authorities, teachers, and their unions at all stages of the reform process is essential to successful reform design and implementation (ILO/UNESCO, 2016). Our research found that the main challenges regarding buy-in involved the building of trust and a shared vision among all parties, as well as the proper involvement of teacher unions.

Ensuring teacher buy-in prior to reform implementation is key to its initial success, as teachers then become more likely to welcome the reform and help with its initial phases. One of the most successful and productive ways to ensure this buy-in is to propose new reforms that directly acknowledge teachers' grievances. For instance, the TCP programme in New York City addressed a common complaint that teachers had no opportunity for career progression unless they opted out of the classroom and into an administrative position. When provided with a grant to move towards performance-related pay models, policy designers listened to these complaints and aimed to design a programme that can effectively deliver solutions. A teacher union representative illustrated this by saying: 'Initial thinking wasn't informed by speaking formally to people but by gathering experiences from teachers struggling' (Crehan, Tournier, and Chimier, 2019: 50). As a result, the administration proposed opportunities for career advancement within a teacher career pathway structure, which teachers bought into almost immediately because this new initiative addressed their concerns and established a shared vision for change.

Another trust-building aspect of the New York City case is the close collaboration between the DoE and the United Federation of Teachers (UFT) union. This collaboration showed the DoE's genuine interest in taking teachers' needs and perspectives into consideration by working closely with their largest representative, the UFT. By seeking direct teacher input to issues in schools, designing policy reforms to address these issues, and including union officials representing teacher interests

at every stage of the design and implementation process, the New York City DoE laid the groundwork for a total buy-in from all stakeholders and thus the potential for successful implementation.

> Because UFT have invested in this, it made our work easier. We are really involved. We go to schools together … We work really from all angles.
>
> DoE official, New York City (Crehan, Tournier, and Chimier, 2019: 50)

However, it is important to note that, unlike in the New York City case, seeking union approval does not always ensure teacher buy-in or a shared vision, as teachers can still feel far removed from the decision-making process. In Mexico, even though the government consulted the main teacher union in the preparation of the reform design, individual teachers still felt marginalized from providing decision inputs. While the national union stayed in step with the government, many sub-national sections actively showed their displeasure by stating the reform lacked a shared vision and excluded actual teachers from its design. Others saw the reform as entailing the loss of teacher workforce stability, professional rights, and benefits. As a result of these complaints, many teachers protested against this reform and threatened its sustainability. While seeking teacher union support for reforms certainly has merit, policy planners should also consider contextual factors and determine whether the union truly represents the voices of teachers. Of course, in a country as large and diverse as Mexico, no policy can ever properly represent every view. Officials should thus keep lines of communication open and constantly seek feedback, as discussed in the following sections.

Another implementation issue involving buy-in stems from more exclusionary practices against unions and teachers in both the design and implementation phases. Instead of seeking support and advice from practitioners in the field, such as teachers or their union representatives, governments sometimes solely seek more academic or theoretical advice to try to find solutions for career reforms. Colombia provides an example of this, where the largest teacher's union claimed to not have been sufficiently involved in the design of the revised teacher career structure. Instead of collaborating with practitioners, the government sought guidance from academic institutions that unions felt lacked the contextual knowledge key to successful reform. Aware of these reservations, the government then passed a new legal decree anyway, without consulting the union. Unfortunately, this immediately led to strong resistance and

teachers rebelled against the first implementation phases, as they felt unrepresented in the process.

> There is not a single example of an educational transformation that has prospered without the country's teachers. Teachers are not an object to be transformed, an input that you grade and evaluate; they are potential allies of the reform.
>
> Manuel Gil Antón, Mexican education academic (Cano, 2016: np)

In examining these cases, striving for a balance of teacher union and direct teacher involvement in the reform planning process therefore seems the best approach to ensuring appropriate teacher buy-in. If policy-makers directly address issues that practitioners experience in the field by including them in the design and initial implementation of a reform, the chances of teacher buy-in should increase dramatically. While academic and theoretical ideas should also certainly have input into the process, they should not do so to the complete exclusion of practitioner voices.

Communicating about the reform

In direct correlation to obtaining teacher buy-in, reform implementation plans should include a comprehensive communication strategy to strengthen understanding and cooperation between institutions and teachers. Ministries of education should devise a strategy that includes a systematic way of sharing information on two features: the overall goals of the policy changes, and an explicit explanation of any new requirements or evaluation processes for teachers. Since new career structures will directly affect teachers' potential professional progression and future salary, providing a free flow of information is vital. The strategy should also include communication platforms that can facilitate direct communication between authorities and teachers. This way, teachers will be more engaged in the reform process and authorities can commit to disseminating transparent and timely messages about the reform. It is beneficial for teachers to learn about the reform directly from those in charge of implementation, so they feel included in decision-making processes and do not receive any surprises at any point in the process.

In our research, Peru provides a positive example of how an interactive communication plan can work effectively between a central authority and teachers. The Ministry of Education created a virtual platform for teachers to convey any doubts about the country's new policies and allowed the Ministry to respond to complaints as well as

suggestions. Moreover, the ministry established virtual networks with 2,500 groups to plan activities and produce and exchange educational materials. The government further invested in conferences, exhibitions, and information sessions in more remote regions to create a space for clarification and debate. Finally, TV and radio shows also served as a key media outlet through which the government communicated with teachers and the general public about the reform. This robust communication plan led to open dialogue between teachers and government officials, and our research showed it directly contributed to teacher buy-in to the reforms. This communication of broad policy aims, as well as providing an outlet for specific implementation questions, allowed Peru to find success in this part of the implementation process.

By contrast, Mexico's case illustrates how a lack of communication can alienate teachers from both the administration and the main teacher union. As noted above, teachers asserted that authorities passed reform measures without asking for teacher input and, as a result, teachers signed a petition against the reform. This lack of communication with teachers has also prevented the administration from successfully summoning teachers to undertake the newly implemented evaluation processes. In analysing these complaints, it appears that the Mexican Government failed to communicate both the broader reform goals and the specific logistics that directly affect teachers and their workplace environment. Such examples of poor communication can create misinformation about reform goals and hinder collaboration between administrators and teachers. Additionally, it can prevent any chance of teacher buy-in, which then hinders successful initial implementation and longer-term sustainability.

South Africa showed signs of trying to communicate new policies but struggled to provide practical implementation procedures for teachers. Information sessions mainly provided orientation geared towards broad overviews, with little applicable to their day-to-day experiences. One interviewee from our research complained: 'We never take the effort to explain why we need to do things and engage in advocacy for new policies' (Sayed and de Kock, 2019: 58). In Ecuador, authorities tried to establish an effective communication plan regarding reforms through a web portal, social networks, emails, and text messages, but our research showed that the stakeholders still lacked information on the specifics of the new career process. *Figure 5.2* shows the results of a questionnaire given to more than 250 teachers and illustrates that most believe they

need more information on an array of topics, especially regarding the requirements and selection processes for promotion. While the design of such an ambitious communication strategy is admirable, this example from Ecuador shows that proper implementation remains vital to achieve the desired results.

Figure 5.2   Degree of teacher information on the processes to be performed (n = 267)
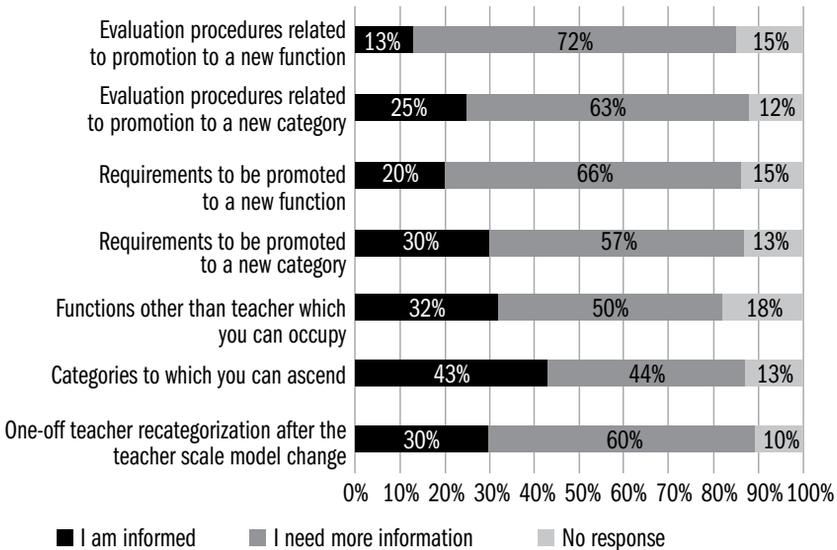
Source: Chiriboga Montalvo and Pinto Haro (2019: 74).

It is also important to note that a completely bottom-up approach to communication can also be detrimental, as it fails to consider the authority structures and can leave administration figures in the dark (Fullan, 2016). The issues faced by the chartered teacher programme in Scotland illustrated the point that communication should go both up and down the hierarchy structure. In that case, teachers could take several courses taught by external sources and receive a pay increase after their successful completion. Teachers did not need any permission or prerequisites to sign up for the courses, however, and often school principals and local authorities (the entity that employs and pays teachers in Scotland) had no knowledge of their participation. It went so far as to become a 'clandestine' activity, with teachers trying to hide their status to avoid extra responsibility (Connelly and McMahon, 2007: 96). Frequently, the local authorities had no knowledge of which teachers

had enrolled in the programme until they received a certificate of completion, which necessitated a pay rise. Unfortunately, this lack of communication also led to unexpected costs for local authorities and eventually contributed to the discontinuation of the programme.

Transitioning to the new career structure

Depending on the extent and nature of the career reforms, the transition from the old system to the new can become one of the most complex and contentious parts of implementation. As opposed to trying to make immediate, radical changes to an entire system all at once, a more adaptive approach enables implementers to adjust the reform based on feedback received from pilot programmes early in the implementation phase. As well as receiving feedback from the pilot, policy planners should also incorporate a monitoring system to properly analyse initial inputs from the field. These measures will not only increase the effectiveness and efficiency of new structures, but also increase the likelihood of teacher buy-in due to their continued participation in the process. After finalizing the new structure through this adaptive process, ministries of education must make yet another decision as to whether they should implement the system for all teachers, only for new teachers entering the profession, or only for volunteers in the early years of implementation.

Adopting an adaptive approach to implementation

An adaptive approach to implementation presupposes a sense of flexibility from invested stakeholders, as the process can lead to several versions before a final design is achieved. Directly supported by a robust communication plan, this approach should seek to identify any contextual needs or issues in the new process. Policy-makers can then use practitioner input and support to design pragmatic alternative solutions for any issues identified. The career model in New York City provides an interesting illustration of this innovative approach. Initially, officials tested a pilot version of the reform and dedicated a budget for formal monitoring that included longitudinal surveys, interviews, and group discussions. This allowed the reform process to grow and adapt progressively, and reinforced a positive perception of the new structure as one that produced tangible results. In addition, the information gathered through monitoring helped to evaluate the TCP's theory of change and to continuously adjust the design and implementation of the programme. This 'learning by doing' approach can also provide an opportunity for policy-makers to amend processes that field studies reveal as inefficient or

inaccurate. Further, these methods facilitate direct teacher participation, which improves buy-in and enhances open lines of communication.

> You need to learn and adjust throughout the process and grow with it. We've grown a great deal, and said, "Well, we won't do that again" or "We'll see with this one." I think that … one of the most powerful pieces is the growth, for us as a team. The UFT, DoE – you know, that's an unusual group working together. The desire, it's there, from all perspectives.
>
> UFT official, New York City (Crehan, Tournier, and Chimier, 2019: 50)

Unfortunately, real-world political pressures can make such an adaptive implementation method difficult. In Mexico in 2012, the newly elected government promised to commit to structural reforms in the education sector. As highlighted in the previous two sections, a new set of reforms passed that angered teachers due to their lack of input into the policy's design. Though receiving strong pushback from multiple parties in the education sector, including teachers, academics, and parts of the national union, the government found public support for the new policies and remained firm in their continued enforcement as initially designed. The government stated, 'that insofar as the organization and management of teacher careers were mandated by law, the rules were not negotiable' (Ortega Salazar, 2019: 9). This rigidity, while potentially politically popular, removed any possibility of a dynamic and adaptive reform process and caused teachers to rebel against the new policy instead of buying into it. This greatly harmed the early implementation of the reforms and, with the election of a new government in 2018, a legal process to remove the policies immediately began. While certainly not a magic bullet, with such a large overhaul of a complex system it seems a more adaptive implementation design could have been beneficial, especially in a country as large and diverse as Mexico.

Big bang versus sequenced approach to transition

Once policy-makers finalize a new career structure for implementation on a large scale, further questions arise of how to deal with transitions from an older system to a new one. Some major examples of issues that need to be considered include how and to which personnel new promotion requirements, evaluation methods, and salary levels apply. Several questions must be addressed. Should only new teachers be automatically integrated into the new scheme? Will in-service teachers be given the chance to opt in? Is it feasible to keep two systems running simultaneously?

There are two main approaches to transition. The first involves a 'big bang', or immediate and forced implementation of a new career structure on all teachers, regardless of experience or seniority. This contrasts with a sequenced approach, whereby either the reform applies to new hires only (grandfathering), or teachers can voluntarily 'opt in' to the new career structure before it becomes mandatory for all teachers after a few years of implementation.

The 'opt-in' approach is an interesting strategy to first pilot the career system on a smaller scale, get feedback, and adjust the policy, which can increase the likelihood of successful implementation in the long term. The 'grandfathering' approach may initially appear to be a smooth and non-contentious way of transitioning to the new career structure, as teachers hired under the old structure are not forcibly incorporated into the new one. However, it raises issues both in terms of management and cohesion of the teaching personnel.

In terms of management, administering two sets of career regulations simultaneously proves burdensome for school systems, and delays the impact of the reform, as the incorporation of new teachers under the new structure spreads over several years. Existing research in Latin America shows that countries that initially adopted a grandfathering approach to career reforms finally decided to apply the new structures to all teachers after a few years, 'even at the cost of conflict with teacher unions' (Bruns, Macdonald, and Schneider, 2019).

With regards to cohesion, Colombia further demonstrates that having coexisting career structures causes tension between senior and entry-level teachers and undermines the implementation of the reform. Colombia's sequenced implementation of a new career structure caused many complications with teachers. Nearly half of the teaching workforce remains employed under an old set of regulations, even though the country enacted the new system over 15 years ago. While all new teachers entering the system must comply with the updated structure, teachers hired before 2002 only transition voluntarily, and many have been hesitant to do so. The new structure makes career progression much more difficult, as many teachers remain stuck on the lowest rungs of the salary scale for prolonged periods of time. Meanwhile, nearly 75 per cent of teachers still employed under the old system have reached the highest salary levels. Complicating things further, teachers under the old system are not required to undergo regular evaluations, while they

are mandatory for new recruits. Such differences can have an extremely adverse effect on the atmosphere in schools and undermine collegiality (Radinger *et al.*, 2018).

In Peru, prior to the 2012 reform, teachers similarly fell under two different career structures. When given the choice, older, more experienced teachers mainly chose to remain in the established system that valued seniority versus the new system that incorporated evaluations for promotion and retention purposes. While the teachers in the established system could earn a pay increase by switching to the new structure, many did not because they lacked confidence that the government would implement the new evaluations and they were uncertain of the new rules and promotion procedures.

Policy-makers in Scotland found more success with the big-bang approach used to simplify an overly complicated career ladder for secondary teachers. The new system reduced the old seven-tier structure to four, with teachers in the eliminated tiers reassigned to new levels. While this caused some teachers to go down a rank, the new policy allowed them to keep their old salary for three years as compensation. This obviously caused some consternation among those teachers who lost status, but one official described the new system as having 'no major challenges … in getting people to apply for posts. The system itself in relation to progression is a fairly good system' (Crehan, 2019: 20). Overall, the change from seven tiers to four was generally well received among teachers. Chile similarly had positive results when implementing a new structure universally for all teachers. They introduced a multistage career structure in 2016 in which all new teachers started at the lowest level, while current teachers were assigned to a step based on years of experience and previous evaluation results (Santiago *et al.*, 2017: 240). One additional provision allowed teachers within 10 years of retirement to opt out of the new system and follow the old structure until their retirement.

However, there are also drawbacks to a big-bang approach. The change of the salary spine is one pertinent example where immediate changes applied to all teachers in a system can cause friction between senior- and entry-level teachers. For example, senior teachers may feel negatively impacted by the reform because they could lose certain benefits or may have to start at the bottom of the new salary spine. In Peru, a new policy implemented in 2012 elevated teachers who occupied certain spine levels under a 2007 reform to higher levels of pay, while teachers with

salary structures defined by an older 1987 reform were placed at much lower levels. This meant that the most senior teachers felt that the 2012 reform greatly harmed both their earning potential and their professional status, and they subsequently expressed vehement dissatisfaction. Essentially, the new reforms discounted the teaching experience that older teachers had acquired by placing them at levels equal to or below teachers with less experience but higher academic qualifications. Even though higher standards of qualifications and certifications can certainly indicate higher quality within groups of similarly experienced new teachers, the experience that senior teachers have earned through actual classroom instruction time should not be immediately discounted or undervalued when implementing a new salary spine.

In sum, hazards exist within both a big-bang approach and a sequenced implementation of reforms. However, it seems that attempts to simultaneously administer two sets of standards, salary spines, or evaluation methodologies can prove burdensome for school systems that already face numerous resource constraints (see earlier section in this chapter) and threatens teacher cohesion. Instead, a big-bang approach that incorporates some flexibility and contextual sensitivity into its implementation provides the best path forward. While some modifications and exceptions should be considered for experienced and senior teachers, such as in Chile, getting all teachers working under one coherent structure as quickly as possible should remain a priority.

Allowing time for culture shift

Reforming the career structure of a profession as large and diverse as public school teachers has a complex set of associated implementation issues. Complicating matters further, the transition from first-generation teacher careers based on seniority and job security to second-generation models based on performance makes for extreme changes to the status quo for teachers. Any such change of circumstances involving a person's employment status or salary is bound to cause discomfort. Therefore, planners should understand that even with open lines of communication and robust implementation plans, acceptance of full-scale policy and structure changes is unlikely to occur immediately among all stakeholders. Simply put, it will prove impossible to make everyone happy straight away. Even though political and context-specific situations can make the process even more difficult, patience and flexibility are vital to achieving a successful transition. In many cases, it is necessary to let teachers

discover the value of the new proposals for themselves by giving them time to experience them in practice. During this 'bed-in' period, teachers become acquainted with the new aspects of the reform and gradually come to embrace them.

> The central topic is implementation. That is, there is a radical change in the way that teacher careers are managed from entry to retirement. I had calculated that Mexico would need some 15 years to fully install the new career models, because there are many routines and procedures involved. We need to assume that this is not magic; you need to carefully dismantle the corporate arrangements that for half a century determined the entry, promotion, permanence, and recognition.
>
> National Education Evaluation Institute member, Mexico
> (Ortega Salazar, 2019: 21)

For instance, with the creation of new teacher roles in the New York City TCP programme, teachers were given Teacher Leaders and Teacher Team Leaders as new co-workers with whom they had to develop a trusting relationship. Teacher Leaders reported that it took teachers some time to trust them and buy into their new initiatives, including classroom observation opportunities and collaborative working groups. One Teacher Leader said: 'It is something that takes a couple of years to marinate and clarify and become distilled within the staff; it definitely didn't happen in the first year' (Crehan, Tournier, and Chimier, 2019: 25). Teacher Leaders also reported that they needed time themselves to spearhead these new initiatives, and they usually waited until they had two to three years of experience to lead such activities. Therefore, giving teachers time to engage with their new responsibilities as well as career advancement opportunities was essential in the DoE's goal to secure long-term teacher buy-in.

Another important aspect of allowing time for an overall cultural acceptance of reforms included gathering further support for the incremental process from predesigned 'quick wins', while avoiding widespread hostility from 'quick losses'. 'Quick wins' include early rewards and tangible successes that can increase support from teachers and may further convince them of the value of the new reform, as they are able to quickly perceive its positive impact on their career. Quick wins further strengthen teacher buy-in and open wider avenues for stronger collaboration if teachers believe reforms have a vested interest in their success and career satisfaction. Ethiopia exemplified this idea in their 2012 reform through the immediate implementation of additional career

levels and a reduction of the minimum years required at each salary level before promotion. These quick wins caused teachers to welcome the reform in its initial stages. Unfortunately, they could not build on this momentum with some of the other implementation challenges they experienced, as this chapter highlighted. In contrast, 'quick losses' can cause a new programme to lose favour so quickly and in such a manner that it becomes irrecoverable. The previously mentioned chartered teacher programme from Scotland is a prime example of this. Though the programme had a great deal of potential and creativity, a lack of monitoring and immediate reform doomed it before it could hit its stride. One official said of it: 'a big, big opportunity missed. It was a superb idea. It could have been quite powerful' (Crehan, 2019: 25). Thus, officials should always remember that implementation is an ongoing process and requires constant supervision and adjustment for any structure to have the chance to succeed.

Conclusion

Ensuring the successful implementation of a new teacher career structure proves an inherently complex task. Whether involving glaringly obvious issues, such as having the financial resources to support new measures or ensuring teacher buy-in, or more nuanced ones, such as adopting an adaptive approach, this stage of a reform cannot be overlooked. Vital to the success of any reform's implementation is the continued engagement from ministries of education and other administrative stakeholders. The implementation phase of a structural reform should not involve simply setting the new plan in motion and assuming or hoping that everything will work as expected. Instead, implementers must stay actively engaged in the process through open communication and a robust system of monitoring.

Chapter 6

Concluding remarks and further reflections

Concluding remarks

Ideally, teaching should attract highly qualified candidates, and teachers should be autonomously motivated, valued by society, and rewarded at a level comparable to that of other esteemed professions. Where this situation does exist, systems have built on decades of investment in the teaching profession. They are able to be selective about who becomes a teacher and sustain a virtuous cycle of quality. But in other settings, massive expansion of education and/or financial constraints and worsening conditions have tarnished the profession. Where durable financial investment in the profession would have been desirable, the opposite has happened, often with negative impacts on learning outcomes.

Yet countries cannot stand by idly without taking measures to attempt to re-professionalize teaching. Too much is at stake. That is why teacher career reforms have been introduced the world over. A representative from the Ministry of Education in Peru interviewed for this research noted that there has been historical mistreatment of teachers, but that the devaluation is being reversed. 'I think there is a consensus on the need to revalue the profession and there are growing policy measures that are advancing in this sense' (Mendoza, 2019: 24).

This research set out to investigate whether making changes to the way teacher careers are organized could contribute to reversing this decline in the status of the teaching profession. Having identified career ladders as the second-generation model of teacher careers holding the most promise for triggering autonomous motivation, one of the selection criteria for countries in our sample was that a career ladder was in use. However, a lot of variation exists in how career ladders are designed and implemented, which has an impact on how they are perceived by teachers. As this research project reviewed the perceived effects of teacher career reforms, the pitfalls of various design options, and the numerous implementation challenges exposed in this study, the conclusions are multi-faceted.

While the key question for policy-makers will be 'Are teacher career reforms worth the effort and expense?', the answer will depend

on which type of career reform is undertaken, how it is implemented, and the background context of each country. While there is evidence that some teacher career reforms have had great benefits, success is far from guaranteed. The question of whether such reforms are worth pursuing is even more complicated in the context of low-income countries, where IIEP mostly intervenes. The research available so far suggests that education systems need strengthening before attempts to differentiate among teachers can be envisaged. This does not mean to say that specific and necessary interventions affecting teachers should not be introduced – on the contrary – but they need to reflect the capacity of education systems to sustain their implementation.

Given the multi-faceted and highly contextual nature of this policy area, this concluding chapter will not attempt to offer policy advice, but rather will articulate our main findings and further reflections by giving guiding principles to consider when making changes affecting the organization and management of teachers' careers.

Further reflections

Start by consolidating what exists and adopt staged reforms

The introduction of second-generation teacher career reforms, especially career ladders that offer horizontal mobility, is a substantial undertaking, requiring a strong administration as well as extensive financial, human, and technical resources. The challenges faced by low- and middle-income countries in our sample raises the question as to whether it makes sense for them to contemplate these career ladder systems, or if a more rational approach would be to consolidate their education system first and adopt more staged reforms that are consistent with their ability to implement them and with teachers' skill levels.

A much-cited report commissioned by McKinsey made just that argument (Mourshed, Chijioke, and Barber, 2010). Researchers analysed the educational systems of 20 countries at various levels of development that had demonstrated successes in improving learner achievements (countries were classified as having moved up the education ladder from 'poor to fair', 'fair to good', 'good to great', and 'great to excellent'). Countries in the poor to fair categories focused on the support and motivation of teachers and on tight central control of teaching materials and lesson plans. At the level of 'great' and 'great to excellent', teachers had achieved a higher level of skills. They derived their motivation

and professional fulfilment from school-level flexibility and teacher collaboration, and became the drivers of innovations in teaching and learning. This suggests that strong foundations need to be in place before attempts can be made to adapt the nature of teachers' work and make it more challenging. The authors argued that countries were successful in improving their system because they were consistent in following policies that were pertinent to their level of development.

Does this mean that countries cannot take shortcuts? In theory, one would be tempted to argue that countries do not develop in a linear way and should be able to leapfrog. In reality, reforms need to be in line with the country's human, financial, and technical capital. As Brian Levy puts it, 'best practice prescriptions confuse the goals of development with the journey of getting from here to there' (2017). Given their complexity, a more rational approach to teacher career reforms might be to start with targeted measures that seek to enhance professionalism within the positions that already exist before attempts are made at differentiating among teachers or widening the opportunities available to them.

For example, better regulation of entry into the profession and improvements in initial teacher training, the setting of recruitment criteria, and the recruitment of managers, would go a long way to improve the situation. In fact, the introduction of entry examinations in a number of our sample of countries has had beneficial effects in terms of better regulating entry into the profession (Colombia, Mexico, Peru, Thailand) and has contributed to increasing its appeal. Entry examinations have helped to reduce nepotism and corruption and have allowed more suitable candidates to enter the profession. Without diversifying the professional roles of teachers, efforts could first target managers, from the head teacher up. Where there are no set requirements or adequate selection processes for education staff beyond teacher level, this can create mistrust in the system and lead to the appointment of unsuitable candidates. In many contexts, appointments are of a political nature. In fact, even in Ecuador and Ethiopia, where career ladders are in place, appointments to some positions are still set aside for political nominations.

A key point is to recognize that change will take time and that a staged or sequenced approach over many years, allowing for some flexibility in the process, is desirable. A long-term vision is required, as benefits are usually felt well beyond the political time of reform advocates. While impacts are generally positive, the extended time horizon of

teacher policy reforms 'makes it difficult to attribute political credit and reduces the rewards for the politicians in power at the time of reform, especially compared with the immediate political costs of launching contested reforms' (Bruns, Macdonald, and Schneider, 2019: 28). In fact, successful education systems demonstrate that it takes decades of consolidating successive reforms and close monitoring to instil change (Saavedra, Alasuutari, and Gutierrez, 2018; De Hoyos, 2019).

Some of the countries studied adopted wide-ranging education sector reforms (Ecuador, Mexico), of which teacher career reforms were just one element. Elected governments have little time to make their reforms, so this approach is tempting. Once the reforms were legally adopted, however, there was little leeway for modifications during implementation, giving rise to strong protests, for example, in Mexico.[12] It is important to recognize that education operates as an entire system, not as a collection of remote elements whose effects can be simply added up; too much disruption at once can risk jeopardizing the implementation of the entire scheme.

This research confirms that reforms should be piloted and accompanied by an ongoing monitoring process that allows the design and implementation to be adapted and adjusted quickly as needed. Change in complex systems is not linear (Fullan, 2000). It is therefore essential to understand that such a complex process must be able to take into consideration any new challenges as they arise.

Make sure salaries are attractive

The question of salaries is intimately linked to that of the appeal and status of the teaching profession and ultimately to education quality. Dolton and Marcenaro-Gutierrez (2011) examined the relationship between teacher remuneration and educational attainment using OECD data. They demonstrate a clear statistical association between relatively higher teachers' pay and standardized pupil scores across countries. Raising the appeal of the profession through increasing salaries thus has a demonstrable effect on education quality. For countries wishing to improve the quality of education, teacher salaries have to be competitive.

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12. In Ecuador, the teacher union was largely stripped of its powers during the reform of 2008 and had not recovered (Bruns, Macdonald, and Schneider, 2019).

As was confirmed through our research, where salaries are insufficient (Ecuador, Ethiopia), there is little hope that attempts to reform teacher career structures will have any impact on enhancing the status of the profession. On the other hand, where teacher salaries are comparable with those of similar professions (Scotland, Thailand), this has a positive effect on the attractiveness of the profession. Hence, it is necessary to consider extrinsic factors before tackling intrinsic motivators: the basics need to be in place. Reforms must necessarily consider the issue of salaries, but this is a prerequisite that raises important financial issues, particularly in low- and middle-income countries. What some countries (Colombia, Peru) in our sample opted for were better starting salaries and higher salaries throughout for teachers joining the career under a new career scheme.

While raising salaries is critically important for the attractiveness of the profession, it certainly is no quick fix. Professionalizing teachers requires a systemic approach (salary is only one aspect of a comprehensive teacher policy) and an understanding that the effects will be felt several decades down the line. 'A country with a stock of low quality teachers cannot simply raise the pay of all teachers immediately and expect the quality of teaching to improve. The existing stock of teachers would clearly have an incentive to appropriate these economic rents with no responsibility to become better teachers' (Dolton and Marcenaro-Gutierrez, 2011: 21). This is what happened in Indonesia. The pay of its certified teachers was doubled with no effect on either measurable effort or student performance for existing teachers (World Bank, 2018: 137). And while the quality of new recruits to the profession will rise, it takes some 30 years to completely renew the stock of teachers. 'The answer then must be to consider how teacher quality can be raised gradually' (Dolton and Marcenaro-Gutierrez, 2011: 21–22) through improving the stock of current teachers.

Do not underestimate the politics at play in teacher career reforms

Understanding the politics of teacher policy reforms is crucial. As Bruns, Macdonald, and Schneider explain, 'they are contentious, often threatening the institutional interests of well-organized and politically powerful teacher unions' (2019: 27). A key element of success is hence to make sure unions are on board. This research also underlined the importance of teacher support and buy-in. This can be achieved by

engaging in social dialogue at all stages of the reform process not only with teacher unions but also directly with teachers via media outlets.

In terms of reform design, grasping the politics of teacher policy reforms also involves knowing what measures can ultimately be passed without generating too much discontent, and recognizing those that will be so contentious that introducing them will be counter-productive and risk jeopardizing the reform process. The thorny question of linking job security to mandatory evaluation illustrates this point well.

A feature of second-generation teacher careers is that lifetime tenure is no longer guaranteed. Yet job stability is a key element of motivation. In systems where the existing stock of teachers is not of high quality, and where they are seeking to attract a higher calibre of candidates, there is a case for sending a clear signal that low-performing teachers are not going to be tolerated. From a parent's point of view, it is reassuring to know that a teacher who is really not performing can, after several rounds of remedial training, be removed from post, rather than just simply being transferred to another school, as is frequently the case. This is the elephant in the room and a particularly sensitive topic.

> In the United States, proposals to phase out the least effective teachers suggest that the gains to learners over time would be substantial: replacing the least effective 7–12 percent of teachers could bridge the gap between U.S. student performance and that of Finland. Estimates of teacher value added in other countries are comparable, suggesting similarly large gains around the world to improved teacher selection.
>
> World Bank, 2018: 137–138

Some countries in our sample introduced the possibility of teacher dismissal as part of the new career schemes applicable to new entrants. Where teachers know what the rules are and adhere to them from the start, this is much less problematic than attempting to change the rules for in-service teachers. If selection into the profession is rigorous and demanding, the probability of having low-performing teachers is much reduced.

On the other hand, there are strong reasons for avoiding linking job security to evaluation as a blanket measure for all teachers. Taking away rights from teachers already in the system is highly contentious and politically risky. In Mexico, the debates around tenure became almost the sole focus of media attention, feeding the teacher-punishing narrative put forward by reform opponents. 'It provided the detractors

of the Reform with the opportunity to construe, in a very effective way, the narrative that the Reform's main objective was that of punishing and firing teachers' (De Hoyos, 2019). This measure had virtually no effect on teachers, as less than 1 per cent of the teachers evaluated between 2015 and 2018 were either fired (those who entered post-2014) or reassigned from teaching positions to administrative positions (those with tenure pre-2014). Mandatory evaluation was revoked by the succeeding government. By contrast, Chile opted for a gradual reform approach, starting with a voluntary teacher evaluation, making it mandatory only after several years (De Hoyos, 2019).

Gear your system toward support, collaboration, and professional development at school level

One of the main takeaways for us was how much teachers enjoyed working in collaboration and getting formative feedback from their peers. This was particularly striking in the New York City case study, where the TCP programme was designed to promote collaboration, support, and CPD. According to the OECD's TALIS survey results, this makes perfect sense:

> rather than sitting through hours of mandatory lectures that are only weakly connected to their day-to-day practice, teachers benefit more from learning from each other and from sharing 'tried and tested' techniques that work in their own contexts.
>
> Carvalhaes, 2017

Unsurprisingly, career ladder systems place a strong emphasis on CPD, either through the introduction of new coaching positions in school or by tying promotion to specific training programmes. With regards to in-school CPD, teachers in our research reported enjoying activities related to improving teaching, including exchanging resources, feedback, and group work on classroom activities, particularly those that combined professional development and collaboration between colleagues.

Collaboration and peer support, originally framed in our minds as professional development, are in fact also accountability mechanisms. As explained in the Global Education Monitoring Report 2017: 'Although rarely considered an accountability tool, collaborative or peer-to-peer learning can improve instruction and monitoring of teacher practices. Teachers reporting back on or sharing their activities with peers, typically by presenting evidence and explaining it in relation to instruction, has

a subtle accountability effect. Collectively, teachers question and learn from each other to improve their practice' (Lassonde and Israel, 2010, in Global Education Monitoring Report Team, 2017: 79).

While accountability generally has a bad press with teachers, it is possible to introduce it in a way that stimulates autonomous motivation. Accountability is often narrowly understood to equate with bonus-pay, surveillance, or market-oriented mechanisms that encourage competition. However, it can take a number of different forms with varying implications for teachers' work and professionalism. Like the choices that are made in terms of career models, there are options in terms of accountability mechanisms. These should be in line with the core principle that helped shape the reform and should be built into the career design. Professional and participatory accountability mechanisms can take the form of teachers reporting to individual peers or peer groups on classroom activities and lessons learned, along with feedback on co-teaching and collaborative work, peer learning, mentoring, reviewing academic research, self-regulation, and other forms of feedback. Research suggests this is in line with the practice observed in high-performing education systems (Jensen et al., 2012).

> Teachers can hold peers accountable through professional accountability. Professional accountability is generally designed by or with teachers and relies on their expertise and professionalism (Fullan et al., 2015). … Such approaches can have long-lasting effects when embedded in the profession's intrinsic ethics and ideals, and seen as mechanisms empowering teachers to be in control of their work. In systems with sufficient teacher professionalism, this type of accountability can reinforce the profession's values. Such internally driven approaches can strengthen the role of teachers as autonomous professionals and promote job satisfaction (Smith and Persson, 2016).
>
> Global Education Monitoring Report Team, 2017: 78

As witnessed in New York City, a key condition of success was that the professional and participatory approaches introduced had no stakes attached. There was a very clear separation between the informal feedback by Teacher Leaders and the formal evaluation processes that contributed to the teacher's appraisal, that were carried out by another individual (the principal) – clearly separating the two roles. This suggests that including professional or participatory accountability mechanisms in formal teacher evaluations may not have the desired effect.

As this research showed, teacher career reforms have the potential to strengthen collaborative working practices among teachers. In order to gear education systems towards collaboration and support, communities of practice and peer-to-peer coaching can be incorporated into teachers' schedules and new roles created for group leaders to compensate for these additional responsibilities. Obviously, there are limits to how far one can rely on this approach. Where teachers are already overstretched, or where teachers do not have the necessary set of skills, this will be more difficult.

Teacher career ladders have the potential to be effective and to improve teacher attraction and retention if properly designed and implemented, but require the system to be ready for such reforms. A key takeaway for governments is thus to carefully evaluate their administrative capacity before launching into major reforms. Moreover, attempts at improving the status of the profession will be pointless unless salaries are attractive. Governments need to be aware that their efforts must be incremental and sustained over several decades to be successful.

Annex 1. Glossary

The diversity of the vocabulary used around the theme of teacher careers can be quite confusing. It should be underlined that different organizations may use varying terminology. Sometimes the same terms are used but the meaning attached to them can differ. This glossary is designed to help readers refer to definitions when necessary when reading this study.

Key concepts

Career – defined as 'an occupation undertaken for a significant period of a person's life and with opportunities for progress' (Oxford Dictionaries, 2015). It differs from a 'job', which is defined as 'a paid position of regular employment', in that a career includes opportunities for progress, whereas a job does not necessarily. The administration of teacher careers therefore encompasses policies concerning how people progress from being new teachers to being experienced teachers. This includes progression in the areas of pay, skills, qualifications, and responsibilities, and how these things relate to one another.

Extrinsic motivation – refers to acting because the action leads to a separate desirable outcome, like a reward. It is associated with initial increase in frequency of action but may lead to a decrease in intrinsic motivation.

Horizontal mobility – teachers are promoted to more advanced teacher levels. It is based on meeting certain standards and allows the teacher to remain teaching in the classroom through different steps of promotion. This is sometimes called 'horizontal promotion' (Vegas, 2005), and as this phrase suggests, the teacher is moving sideways rather than upwards.

Intrinsic motivation – refers to acting because the action is inherently interesting or enjoyable. It is associated with creativity, problem-solving, cognitive flexibility, and persistence.

Motivation and satisfaction – one is motivated to take action that leads to the satisfaction of a need or desire. Motivation is a desire or willingness to have something; satisfaction is how you feel once you have it.

Promotion – teachers are promoted to new roles/responsibilities and titles based on their evaluation, with a salary rise attached.

Stream, track, or pathway – refers to different categories of promotion opportunities, also often referred to as career pathways. Most systems have only two streams: the traditional stream that leads to senior management positions (vertical mobility); and the usually newer stream that leads up through more advanced teacher levels, with teaching remaining central to the job (horizontal mobility). Some systems have more than two streams, such as in Singapore, where teachers can choose between three streams or tracks: the teaching track, the leadership track, and the senior specialist track.

Teacher standards – descriptions of what teachers are expected to be able to do or know at different stages of their career.

Vertical mobility – a career structure where teachers are promoted to administrative or leadership positions and teaching stops being central to their job.

Career models

Bonus pay or performance-related pay – teachers are awarded one-off financial rewards. Refers to programmes which award teachers one-off financial rewards for desired performance, either as measured by student grades in standardized tests, or by broader teacher evaluation.

Career ladder – teachers are promoted and take on new responsibilities. Here teachers do not just go up the pay scale by passing an appraisal, but take on a new status or role, such as 'lead teacher', having met the required standards to do so, and their pay reflects their new position.

Single salary schedule – teachers' pay increases yearly, independently of teaching quality. The only other factors taken into account in pay are additional qualifications, and promotions to administrative positions.

Single salary schedule contingent upon appraisal – salary rises are dependent on passing an appraisal. Here salary rises at key points (every three years, for example) are dependent on passing an appraisal. Sometimes the standards teachers are appraised against become more challenging the longer they have been in the profession.

Bonuses

Payment by results (PBR) – used to describe programmes which base bonuses on student results only.

Evaluation modes

Criterion-referenced – teachers' skills are judged against criteria or standards. Any teachers who meet the set of standards required for promotion receive the promotion, irrespective of the performance of their peers.

Cumulative judgement – allocation of a certain weighting or point score to different elements of the appraisal process, for example a lesson observation and a test, which are added up to reach a final score.

In cumulative evaluation, each part of the process (observation, portfolio, professional development completed, etc.) is assigned a score. For example, an 'outstanding' grade in a lesson observation gives you 20 points or attending course X gives you 5 points. All the points from the different elements are added up to determine your final evaluation score. What happens next depends on whether the promotion process is criterion referenced or norm referenced. If it is criterion referenced, and your score is over a certain number, for example 100, then you get promoted. If is norm referenced, then your point score is compared to the point score of other teachers, and only those scoring the highest get promoted.

Formative evaluation – focuses on the provision of feedback useful for the improvement of teaching practices and opportunities for professional development. It involves helping teachers learn about, reflect on, and improve their practice. It is usually conducted internally at school level and is not always regulated at national level. By identifying the strengths and weaknesses of teachers, school heads can make informed choices on the specific professional development activities that best address teachers' needs in the framework of the school's priorities.

Holistic judgement – teachers' overall outcome is based on teacher standards and whether or not they have shown the necessary skills/competencies required. However, there is no formal allocation of points or weighting to certain components because evaluation is a result of a more holistic consideration often made by one agent (in many, but not all, cases the principal). Evidence for the meeting of the competencies is still drawn from different components of the appraisal process.

In holistic evaluation, a teacher may still take part in various activities such as observations and portfolios. But rather than each one being allocated points and then added up, they are used as evidence to help someone (usually a principal) to make a judgement about the promotion. They look at all the evidence and decide. Usually (hopefully) there will be some criteria or standards to help them make their decision, and they will match evidence from the various activities against the standards. For example, the standards might say 'plans to meet the needs of students with disabilities', and the principal will see in their portfolio, or in their lesson observation, that the teacher has done this, and so ticks it off. If everything is ticked off, they are promoted. Usually if a holistic approach is being taken, the decision is criterion referenced (you just need to meet the standards), but sometimes if a country does not have enough money to promote everyone who meets the standards, they might then make a further decision about which teachers met the standards the best (in which case this is norm referenced).

Norm-referenced – teachers are compared with each other. Only the highest-rated teachers get a reward or promotion. This could be based on who has the most points or using other criteria.

Summative evaluation – focuses on holding teachers accountable for their performance. Consequently, this type of evaluation can have a series of consequences on their career. It aims at providing information on teachers' past practice and on their performance, collected at different moments of their career and related to what is considered as 'good' teaching, and at introducing measures to encourage teachers to perform at their best. This type of evaluation can involve external evaluators and generally has consequences for the teacher, entailing career advancement, reward, or the possibility of sanctions in the case of underperformance.

Teachers by types of contract

Contract teacher – refers to teachers who agree to work outside an employment relationship. As such, they receive a salary for the work they do, but have no other benefits (such as paid leave, pension, or health insurance), such as those that apply under public-sector employment laws and those that apply under private-sector employment laws.

Public service teachers – refers to teachers who are paid by the state and recruited and trained in official training institutes. They usually

have an open-ended appointment, which means their contract has no expiry date. The contract terminates when the employee leaves the job or retires, or when valid reasons (usually serious incompetence or misconduct) allow the employer to terminate the contract.

Annex 2. Country summaries

Summary: The organization and management of teacher careers in Colombia

Introduction

Teacher careers have been central to Colombia's strategy for education quality improvement. Over the past two decades, the country has experienced a great number of education reforms during which the teacher career structure has changed significantly in terms of the procedures governing entry into the profession, salary increase, and teacher evaluation. A new career scheme was adopted in 2002 which only applied to new entrants to the profession. This resulted in the present situation where teachers, depending on when they joined the profession, are regulated by two different career frameworks. Under the new regulation, teacher evaluation is at the heart of teacher career progression. Despite a promising design, the new career scheme has met multiple implementation challenges.

Reforms and key legislation

Decree 2277 (1979) and Decree 1278 (2002) are the two main documents regulating teacher careers in Colombia. The former corresponds to a single salary schedule, whereas the latter introduced a system of salary progression based on appraisal. The new scheme also relies on a career ladder model where teachers can apply for support and managerial positions if they meet the requirements and pass an evaluation. Since 2015, a bonus is also granted to teachers participating in the programmes *Todos a Aprender* and *Jornada Única* if they achieve quantitative improvements. In 2015, Federación Colombiana de Trabajadores de la Educación (FECODE, the main teacher union) and the government agreed upon certain changes: salary levels were increased for teachers under Decree 2277 and competence evaluation instruments were modified for teachers under Decree 1278 in order to better assess teachers' practices. In 2017, the position of teacher support leader was discontinued after strong opposition from FECODE.

Organization of the career structure (under Decree 1278)

Colombia has a structure with options of both a career ladder and salary progression based on appraisal. Both structures involve teachers, support personnel, and administration figures, and have multiple steps in the evaluation process.

	Career ladder	Salary progression based on appraisal
Main features	- School principals: responsible for directing the administrative, pedagogical, technical work of schools and managing the overall school environment. - Coordinators: assist and collaborate with school principals in their functions as well as contribute to functions related to the discipline of students or academic and non-academic teacher activities. - School counsellors: responsible for the diagnosis, planning, execution, and evaluation of activities related to student orientation and development. - Classroom teachers.	- The salary spine consists of three grades (i.e. 1, 2, and 3, the third being the highest). - Each of the three grades includes four levels denominated A, B, C, and D (D being the highest). - The system applies not only to teachers but also to school managerial positions (principals, school counsellors, and coordinators).
Criteria for progression	Different requirements exist for each of the above-mentioned positions. Overall, these are a mix of: - bachelor's degrees in related areas of study (some other qualifications are accepted in some cases); - a certain number of years of experience depending on the position. Candidates must undergo a competitive examination in which they are ranked according to their score. After the probation period, successful candidates are appointed to those positions.	In order to move to a higher salary level (from B to D), there are three requirements: 1. Pass a competency evaluation (scoring at least 80 out of 100), including the following criteria: a. Behavioural competencies: personal characteristics that favour the performance of the teaching and educational leadership functions. b. Pedagogical competencies: teachers or school managers' knowledge and skills to formulate, develop, and evaluate teaching and learning processes in schools. c. Discipline-specific competencies: skills related to the specific teacher or school manager functions. 2. Pass the two latest annual performance evaluations (scoring at least 60 out of 100). If performance is rated unsatisfactory on two successive annual evaluations, teachers can be dismissed from their positions.

	Career ladder	Salary progression based on appraisal
		3. Have three years of service (scoring at least 60 out of 100).
		In order to move to a higher salary grade (1 to 3), a teacher needs to satisfy the same requirements as for the level increase and undertake relevant studies (e.g. graduate or postgraduate). Academic qualifications determine the teacher's grade: • Grade 1: graduates from Higher Teaching Schools; • Grade 2: undergraduate degree in education or undergraduate degree in another field (supplemented by a teacher training programme); • Grade 3: master's or PhD degrees related to their tasks at schools.
Tools	The competitive examination consists of a written test on basic competencies, a psycho-technical test, an oral interview based on a case study, and a background appraisal.	**Competency evaluation:** Until 2015, a written public national examination consisting of 100 multiple-choice questions was used to evaluate teachers' competencies. It was replaced by a diagnostic and formative evaluation that is largely based on the assessment of a classroom video, and complemented by the results of the two latest annual performance evaluations and students' survey (this last instrument is not used for teachers working at pre-primary and the first three years of primary levels). **Annual performance evaluation:** Teachers gather evidence in a portfolio throughout the academic year. Evidence can include certification documentation (e.g. individual annual work plan, professional development programmes undertaken, student exam results, etc.) or feedback from school community members (e.g. student and parent surveys, interviews, self-evaluation tools, etc.).

	Career ladder	**Salary progression based on appraisal**
Evaluators	The National Civil Service Commission is responsible for the selection process of candidates. It may delegate the management of certain steps to universities. Tests are administered by the Colombian Institute for Education Assessment.	**Competency evaluation:** Colombian Institute for Education Assessment **Annual performance evaluation:** Teachers are evaluated by their school leaders who are, in turn, evaluated by regional supervisors.
Type of evaluation	Cumulative and norm-referenced evaluation.	**Competency evaluation:** External, cumulative, and criterion-referenced evaluation. **Annual performance evaluation:** Internal, cumulative, and criterion-referenced evaluation.

Implementation challenges

Administrative and management challenges

Numerous implementation challenges have hampered the effectiveness of Decree 1278. Most prominently, the co-existence of two career frameworks has raised the issue of inequality among teachers. While teachers under the new statute must complete regular mandatory performance evaluation, this is not the case for teachers employed under the old framework. Further, the recruitment process is hampered by operational challenges, including delays and sporadic public contact in some areas, leading to the use of temporary contracts. The evaluation scores required for a salary increase seem too high, as few teachers can achieve them, and many of them stay on the same salary grade or level for six or more years. This leads to a general lack of motivation to participate in the examination. When conducting teachers' annual performance evaluations, school directors tend to rely exclusively on principals' evaluations. This proved to be problematic, as they tend to give very high scores to all teachers, possibly to avoid internal conflict. Finally, school principals' selection overlooks leadership and managerial skills, putting great weight on knowledge rather than leadership skills.

Financial aspects

The reform introduced high salary incentives for teachers to increase their postgraduate qualifications, which could have important financial implications in the long term. However, despite a few scholarship

programmes, the cost of undertaking undergraduate studies is high and teachers are therefore reliant on their own personal financial resources to get a salary grade increase.

Participation and communication aspects

The participation of teacher unions was limited in both the design and the implementation of the current teacher career policy. Several aspects of the reform have generated resistance from the main teacher union and triggered national strikes. Negotiations led to the revision of the competency evaluation, increases in the salaries of teachers on the old career scheme, and the discontinuation of the teacher support leader role.

Perceived effects

Despite the challenging working conditions, the teaching profession holds a certain appeal in Colombia. In all entry examinations, the number of applicants exceeds the number of vacancies. Job stability, an attractive career structure for teachers under the new system, and the benefits of a special health insurance scheme have had a mainly positive influence on teacher motivation. The entry examinations and rankings of eligible candidates involve more transparent selection criteria, which has improved trust in the system. Thanks to higher entry requirements, teachers working under the new career framework are, on average, better educated than teachers under the old system.

On the other hand, the existence of two different systems of evaluation creates a sense of inequality for the 'new' teachers vis-à-vis a sense of laxity for the 'old' ones. Repeated failure in passing the appraisal for salary increases is also highly demotivating for teachers under the new system. Many of them succeed in achieving higher qualifications (e.g. masters' degree), but are unable to pass the evaluation, causing great dissatisfaction. Even though the new salary scheme is attractive for most teachers, they still typically earn less than professionals with similar qualifications.

Conclusion

The 2002 teacher career reform has been an important step towards the recognition and the professionalization of the teaching profession in Colombia. It is an ambitious reform, which introduced higher requirements as well as a systematic approach to teacher evaluation. One of the main strengths of the new career structure is the competitive entry

examination, which has improved transparency and trust in the selection process as well as the calibre of candidates being recruited.

However, multiple weaknesses have also been identified. Teacher careers in Colombia are still regulated by two different norms, which continues to justify differentiated treatment and pay of teachers who conduct the same tasks. It remains to be seen how new competency evaluation tools will actually be implemented and whether they will be more flexible and able to provide constructive feedback in order to improve teacher practice. Finally, the career structure provides limited incentives for teachers to progress in their career. Evaluation standards seem too high, which demotivates teachers and discourages them from applying for salary increments.

Summary: The organization and management of teacher careers in Ecuador

Introduction

Ecuador has invested much in public education improvement efforts over the last decade. Recent reforms have focused on substantially changing teacher career structures. Key improvements include the creation of recruitment and promotion criteria, the implementation of new evaluation systems, and investment in career advancement opportunities for teachers. Teachers now have the opportunity to progress to a higher position every four years based on successful completion of evaluations.

Reforms and key legislation

Ecuador's recent reforms include two ten-year education plans which focus on the transformation of teacher careers, the first instituted in 2006 and the second in 2016. The Ecuador Political Constitution reform (2008) was a key piece of legislation, under which it became mandatory for educational matters to be under state responsibility. This reform also established general guidelines for a teacher career ladder. Furthermore, the Organic Law of Intercultural Education (LOEI) was first instituted in 2011 and established a general framework for entry into the teaching profession via competitive examinations, among other requirements.

Organization of the career structure

The teacher career structure in Ecuador is composed of a career ladder model, which offers non-teaching positions ranging from adviser to principal, and salary progression based on appraisal, which regulates pay rises throughout a teacher's career.

Implementation challenges

Management and administrative challenges

Several implementation issues have emerged with the new teacher career structure. Even with the reforms, Ecuador has struggled to recruit enough teachers. The number of applicants pursuing teaching-related university degrees has declined, and the training offered is deemed inadequate in the face of current changes to the career. New salary grades have devalued years of experience. New promotion criteria are also viewed as too demanding. Many teachers believe that the number of years' service increasingly puts senior teachers' motivation at risk, as senior teachers

	Career ladder	**Salary progression based on appraisal**
Main features	The career ladder is composed of seven levels (not counting the entry teacher level) that include teaching and management positions: • Teacher; • Teacher-mentor: mentors new teachers and provides joint planning, classroom observation, feedback, and more;* • Teacher-student adviser: a teacher who provides advice to students; • Sub-inspector: performs tasks delegated by an inspector; • Inspector: ensures that conduct rules are followed at the school; • Vice-director/vice-principal: oversees the school's Pedagogical Technical Commission and ensures quality standards; • Principal: ensures compliance with the rules and directs implementation of academic programmes at the school; • Educational adviser: responds to immediate management challenges related to quality standards; • Educational auditor: serves as communication liaison between the school and higher levels of administration and collaborates with educational adviser. Educational auditors perform external evaluations for each school every four years, which are complementary to the standardized exams that the Educational Evaluation National Institute (INEVAL) applies to teachers, students, and principals. Teachers appointed to the adviser and auditor positions can hold them for an indefinite period of time, while management positions can only be held for four years.	The salary spine was shortened from ten to seven grades. Placement in one of these grades is determined by academic qualifications. The seven grades are represented by levels G to A in ascending order. Each level requires four years of teaching experience, meaning that a new teacher can move from level G to F after four years of experience, and so on. The only exception is the promotion from level E to D, which requires eight years for teachers who do not hold a master's degree. Because this salary spine is part of a new career structure, teachers migrating from the old to the new spine benefited from a rise in salary corresponding to their placement at entry-level G. Older teachers were also given the chance to progress up the new spine upon entry into the new system if they met the requirements. However, only 10 to 15 per cent of teachers have successfully switched to the new salary spine.

	Career ladder	Salary progression based on appraisal
Criteria for progression	Each position has specific requirements. Overall, criteria for progression include: • passing INEVAL exams and any other competitive examinations; • passing either a mentoring training or skills training process; • for teaching positions, holding a bachelor's degree in teaching and learning with emphasis on the discipline they are applying for; • for management positions (principals, vice-principals, directors), holding a graduate degree in educational management.	Three criteria are considered: 1. professional title and length of service; 2. professional development based on courses and training programmes offered; 3. evaluation results. Teachers must pass a performance evaluation, which can be graded as: • emerging; • elementary; • favourable; • excellent. Teachers who receive an 'excellent' rating are given a pay bonus until the next evaluation cycle. There are additional criteria to reach levels B and A, including holding a master's degree in education, a scholarly study publication, or a pedagogical project. Teachers are also expected to participate in CPD programmes throughout the levels.
Tools	The tools used include an entry examination, an interview, and a background appraisal. A list of eligible candidates is then prepared, and they are ranked according to their score. After the probation period, successful candidates are appointed to those positions.	The performance evaluation consists of an internal questionnaire, a portfolio analysis, class observations, and an external evaluation. The latter includes a subject-specific examination, a survey, and a rubric for class observation.
Evaluators	The Ministry of Education is responsible for conducting some entry evaluations such as psychometric tests, class observations, applicant interviews, and background appraisals. INEVAL is in charge of designing and carrying out external standardized tests both for the entry process and for assessing the in-service performance of teachers and principals.	
Type of evaluation	Cumulative and norm-referenced.	

* They have reduced teaching duties and can go back to teaching-only positions after finishing their time as teacher-mentors.

feel disadvantaged because the new salary grade system required to advance to the next level and the minimum score required for performance evaluations are too high. Teachers are thus discouraged from pursuing promotion options.

Evaluation process challenges

Implementation issues have stemmed from a failure to properly evaluate teaching skills. In the absence of a teaching skills exam, the entrance evaluation is unable to determine new applicants' teaching skills and instead relies on determining the level of disciplinary knowledge. Some have also questioned the validity and reliability of certain evaluation exams, as it is unclear whether psychological and demonstrative tests truly allow for conclusions about teaching practices in the classroom.

Financial challenges

Teacher salaries comprise an overwhelming portion of the educational budget (87 per cent), raising doubts about whether the system is capable of formalizing new teacher positions as part of the permanent staff. Although teachers were promised a pay bonus if they scored an 'excellent' rating on their performance evaluation, they have reported that this promise has not been fulfilled.

Perceived effects

In general, working conditions have improved for teachers in Ecuador. Working hours are now regulated, protecting teachers from being overworked, and salaries are higher than before the 2006 reform. However, there is still a long way to go to improve teacher motivation, as many teachers complain that recent reforms have only succeeded in increasing the number of structural procedures, rather than offering tangible opportunities. This sentiment may be a result of frequent failure to attain promotion or other professional advancement opportunities. Teachers complain that standards are too high, and that information is not properly communicated to the staff.

Nevertheless, teachers tend to appreciate the new evaluation procedures put in place. They recognize that evaluations encourage learning, support them in identifying and addressing weaknesses, and increase transparency in hiring and promotion processes. Newly offered professional development opportunities, such as in-service training and the pursuit of master's degrees, have also made a positive impact on teachers. Finally, the recent reforms have increased teachers' motivation to stay in the profession, with only a quarter of the staff expressing a desire to leave their position.

Conclusion

The teacher career structure reforms in Ecuador have succeeded in creating professional development and promotion opportunities for teachers. This has allowed teachers to gain professional training and seek higher positions within the profession without having to leave the classroom. However, some challenges have yet to be resolved in order to further improve the system. There are delays in teachers' ability to progress from one career step to another and, more importantly, promotion criteria seem to be too demanding. As a result, many teachers feel incapable of applying for a promotion. Overall, the new reforms recognize the need to hear teachers' voices when designing their careers. This opens possibilities for further teacher involvement in career structure reforms.

Summary: The organization and management of teacher careers in Ethiopia

Introduction

Ethiopia introduced a teacher career ladder in 1995 as part of an ambitious agenda to improve the quality of the teaching profession. The reform was intended to help elevate the profession's prestige and to make teachers feel appreciated in order to attract better candidates. As articulated in the latest education sector development programme, ESDP V, teachers clearly remain a priority. However, teachers often question the effectiveness of the career structure. Unfortunately, despite several reforms, teachers' pay has remained low, which very negatively influences teacher morale, hinders the status of the profession, and restricts the capacity of the career model to yield positive effects.

Reforms and key legislation

The first salary scale and career structure implementation directive was enacted in November 1995. It established multiple steps on a career ladder and seemed to affirm government recognition of the importance of the profession. The next policy reform was introduced in 1999. It aimed to improve teacher career guidelines by clearly setting the specific criteria that teachers are expected to achieve in order to be eligible for promotion at all stages of the career ladder. It also specified teacher performance evaluation procedures. Further reforms in 2012 introduced a seventh step on the career ladder (senior lead teacher), reduced the minimum length of service required for each position from four to three years for several of the levels in the structure, added two additional career levels for pre-primary schoolteachers (raising the previous level from five to seven), and introduced a new career ladder for school principals and supervisors.[13]

Organization of the career structure

The teacher career structure in Ethiopia is composed of a seven-level career ladder model that offers teaching positions only. Management positions are not open to application as they are traditionally political appointments made by district offices. Teacher careers are structured in the same way for both primary and secondary teachers, and the system applies both to recently recruited teachers and those already in post.

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13. In July 2016, after this research was completed, the length of service required for each position was further reduced, the number of teacher levels increased from seven to nine, and teacher salaries at all levels were increased.

Career ladder	
Main features	• The teacher career ladder comprises the following seven levels: beginner teacher, junior teacher, teacher, senior teacher, associate lead teacher, lead teacher, and senior lead teacher. • Each step in the ladder is associated with clear, detailed responsibilities. • The pay of promoted teachers reflects their new level of responsibility and depends on the type of school the teacher works in. For example, salary increases related to promotion from junior teacher to teacher will be higher for someone working in a secondary school than in a primary school.
Criteria for progression	Teachers must submit an application in order to be considered for promotion to the next step on the career ladder. The established guidelines outline the following major requirements for teachers to be eligible: • the qualifications required for each of the career levels, professional training in teaching, service year in a position, and teaching effectiveness; • diligence in continuously improving one's qualifications; • ability to give support and to evaluate students' behavioural changes; • participation in school administration and coordination of co-curricular activities; and • relationship and cooperation with the school community and parents. Evaluation of performance occurs once every term (twice a year) and is mandatory for teachers to be eligible for promotion. The average evaluation score of four consecutive terms (two academic years) is considered, and the required score gets higher when moving up the career ladder. The evaluation modes, agents, and methods do not vary according to the position of the teacher.
Tools	The tools used are: • classroom observation; • portfolio analyses; • peer evaluation; • principal's observation; • student reviews; • parent reviews.
Evaluators	Teachers are evaluated by four different actors at the school level: school principals, colleagues, students, and representatives from the parent–teacher association.
Type of evaluation	Cumulative and criterion-referenced evaluation.

Implementation challenges

Administrative and managerial challenges

Though financial problems caused the biggest number of complaints among teachers, numerous administrative and managerial issues also emerged. First, the series of revisions introduced to the career scheme lacked comprehensive written guidelines, and thus, some schools and

individuals involved lacked a sound understanding of their roles in implementing the career process properly. Exacerbating this issue, many district offices employ workers who do not meet the qualification requirements for their position and were often unprepared to properly implement the new reform. In other cases, local authorities refused to promote eligible teachers due to ethnic or political issues, greatly decreasing trust in the education system. Some assessors failed to apply the evaluation criteria properly and were unable to make a distinction between the best performing and poorly performing teachers. Adding to the difficulties, the career ladder requirements include tasks that most teachers have no skills for (especially research activities). Finally, the involvement of parents, colleagues, and students in teacher evaluation proved problematic. The knowledge of parents and colleagues about teachers' work may be limited, while teachers may sometimes be tempted to please students so as to succeed in their evaluation.

Financial challenges

Beyond low salary issues, the new reforms also found a mismatch between the financial capacity of district education offices and the number of teachers who deserved promotion. In Ethiopia, it is the responsibility of district education offices to determine the number of teacher promotions per year and to pay all teacher salaries. As such, they are often unable to award promotions to all teachers who meet the requirements because of insufficient budgets. This causes obvious frustration among teachers and further erodes confidence in the structure.

Perceived effects

Different aspects of the career ladder have had varying effects on teacher motivation. Several have had positive responses, including the introduction of a career structure for teachers that is separate from other civil servants, the inclusion of the seventh career level/position for primary and secondary school teachers, and the reduction of years needed before promotion from the fourth level. However, continuing issues with implementation and structural design flaws have caused enthusiasm to wane. The absence of promotion opportunities for senior teachers beyond the seventh level of the career ladder (teachers have the ability to reach the top of the ladder in 14 years with no other promotion possibilities) and administrative malpractice committed mostly by district education officers have been the major reasons for high levels of dissatisfaction and demotivation among teachers. But perhaps the foremost reason why

these changes could not make the teaching profession more attractive is the continued low salaries of teachers at all levels. As retention of teachers has continued to remain an issue, it seems the career ladder structure has not reversed the fundamental adverse impacts of low pay, unfavourable working environments, low societal value of teaching, and lack of good governance in the system.

Conclusion

The teacher career reform that introduced a career ladder model and a differentiated salary scheme for teachers was initially welcomed in Ethiopia and appreciated by teachers, as it appeared to improve the status of teachers and boost the professionalism of the occupation. Nevertheless, it is difficult to draw clear conclusions, as low teacher salaries remained a major problem in the country and seriously affected teacher attraction, motivation, and retention. In fact, a directive was adopted in July 2016 (after the completion of this research) that substantially increased teacher salaries at all levels.

Although the teacher career reform has interesting design elements, the research found that it was entangled with a series of administrative, managerial, and financial challenges. It is crucial to properly address these challenges in order to improve the effectiveness of the scheme and thereby make the teaching profession more attractive to potential candidates as well as to those who are already in the profession.

Summary: The organization and management of teacher careers in Lithuania

Introduction

Lithuania introduced a teacher career structure more than two decades ago, which renders it mature enough to gain valuable insights on the experience related to designing, implementing, and sustaining an attractive teacher career model. Most importantly, the Lithuanian experience proves that an innovative and successfully implemented career design alone may not be powerful enough to attract the best candidates into the profession and retain them when salaries are not attractive. In Lithuania, starting salaries are low. In addition, a declining student population causes a decrease in individual teachers' workload and pay (teachers are paid by the hour).

Reforms and key legislation

A career ladder structure has existed in the country since 1991 and underwent several modifications in 1998, 2007, and 2008. The same regulations and career pathways apply to both primary and secondary teachers throughout the country. All reporting in this summary is based on these past reforms, as a new system was scheduled for implementation beginning in September 2019.

Organization of the career structure

The teacher career structure in Lithuania consists of the following models:

- Career ladder – two main streams are available for teachers: they can take on additional responsibilities and be promoted to management positions (vertical mobility) or to more advanced teacher levels (horizontal mobility). Teachers can choose and move from one stream to another once they have met specific requirements. Access to advanced teacher levels entails having spent a minimum number of years in the teaching profession and undergoing an evaluation procedure for certification.
- Single salary schedule – teacher salaries increase automatically after 10 and 15 years in service.

A bonus pay system also exists in certain schools but is subject to available resources. However, bonus pay is not a widespread practice and thus will not be discussed in depth.

Career ladder	
Consists of two streams (teaching and management) between which teachers can switch if they fulfil certain requirements. The existing career structure applies to new entrants as well as those already in service.	
Teaching stream (horizontal mobility)	**Management stream (vertical mobility)**

	Teaching stream (horizontal mobility)	**Management stream (vertical mobility)**
Main features	• The levels include teacher; senior teacher; teacher-methodologist; and teacher-expert. • A higher teacher qualification category comes with additional responsibilities and an associated salary increase. Promotion to a higher level adds considerably more to teacher salary than an automatic increase that depends on work experience (single salary schedule).	• The available positions include: deputy principal responsible for education; principal; and chief of teaching for organizing school divisions. Each has different associated responsibilities. • Managers in these positions can belong to one of the three qualification levels, third, second, or first. • Responsibilities do not change from one level to another but instead reflect the proficiency of the manager. Nevertheless, there is an associated salary increase with each additional level.
Criteria for progression	• Teachers submit a request for evaluation to the school Certification Commission after first conducting a self-evaluation according to a special form. • The appraisal system has performance-based, professional development, and job-enlargement features. Diverse competencies, activities, work in a classroom, years of experience, and professional development initiatives are considered. • The appraisal procedure is not mandatory for teachers, and they can undergo evaluation two years after the previous one.	• Managers must provide documentary evidence of predefined competencies. Every qualification level is associated with certain requirements. • Fourteen competencies in the following four categories are evaluated: (a) knowledge of education policies and the creation and implementation of the school strategy; (b) management of the education process; (c) human and physical resources' management; and (d) transversal competencies. • The evaluation is mandatory for school managers every five years. It is, therefore, possible for them to lose their current qualification category.

Career ladder		
Tools	Evaluation tools are the same for all qualification categories. These include: • interviews; • portfolio analysis; • review of the results of previous appraisals, if any; • class observation; • analysis of the self-evaluation form; • review of thematic plans, teaching, and methodological materials prepared by the teacher; • review of publications, seminars, and projects conducted by a teacher; • any other evidence of competencies.	Evaluators conduct interviews with the manager and other stakeholders in the community (teachers, parents, school council members, etc.). The following documents are reviewed: • proof of personal and school results; • attestation of activities that took place in school; • results of previous external evaluations; • budgetary reports; • proof of their participation in conducting seminars or preparing reports; • publications; • a self-evaluation form; • competency development plan; • any other evidence of competencies.
Evaluators	Evaluators (such as school principals, education specialists, representatives delegated by the ministry of education [MoE], etc.) vary according to the qualification categories. Evaluation results are presented to the school Certification Commission which makes the final decision.	Agents that evaluate managers (for a qualification level upgrade) are all education management experts specifically trained for this job. The number of evaluators increases as a manager moves to a higher category. A decision about the promotion is taken by a Certification Commission formed by the municipality/MoE.
Type of evaluation	Cumulative and criterion-referenced evaluation.	Cumulative, holistic, and criterion-referenced evaluation.

Implementation challenges

Administrative and managerial challenges

A specific challenge of the Lithuanian teacher career structure is the imbalance between the number of teachers in different qualification categories and the number of positions of responsibility available in schools. The balance is distorted because the teaching population is ageing as a result of decreasing enrolments. A lot of experienced teachers have reached the top of their career, while there are a limited number of vacancies for younger teachers to enter the profession. Another challenge stems from the fact that, in spite of the maturity of the system, responsibilities in each qualification category are not clearly defined: current descriptions of responsibilities are vague.

Challenges have also come from the evaluation process and professional development opportunities. In conducting assessments on teacher performance, some evaluators' closeness to teachers has resulted in the objectivity of the outcomes being questionable. Evaluations also tend to be short in duration, and in some cases only allow evaluators to see fragments of teachers' work. This, along with strictly predefined criteria evaluated by a point system, sometimes does not allow the creativity and individuality of each teacher to be appreciated.

Finally, the system struggles to provide quality professional development activities, as they can lack quality, proper length or depth, or a focus on long-term outcomes.

Financial challenges

Financial issues have also caused implementation problems, as planners have had difficulty in foreseeing the number of teacher promotions. The municipality and the Ministry of Education cannot be sure how many teachers will be promoted, despite the evaluation schedule that is supposed to alleviate the problem. As a result, some teachers have been blocked or discouraged from seeking promotion due to lack of funding for salary increases. Additionally, although schools prefer to hire higher-level teachers with more experience and qualifications, they are often required to hire lower-level teachers because of budgetary constraints.

Perceived effects

Teacher motivation is driven by many complex and interrelated factors. Some respondents believe that achieving a higher qualification category brings about an increase in teachers' status, image among colleagues, sense of autonomy in their work, and sense of recognition. However, others underline that qualification categories seem to have lost the 'psychological weight' that they initially had. This stems from teachers across all categories suffering from more pressing issues, such as a low workload, low public opinion of the profession, and unsatisfactory salary. Salary issues also undermine teachers' satisfaction and their overall appreciation of the career scheme. In a context of high emigration rates and low birth rates leading to school closures, teachers' salaries – which are based on the number of contact hours – are decreasing. Further, the absence of a regular, mandatory evaluation means teachers do not necessarily continue to carry out the activities that are necessary to fulfil

the requirements of their current category. Some teachers also believe that the current system does not enable proper evaluation of the learning process in the classroom.

Attraction and retention of teachers seem to be influenced largely by factors other than the career model. A low starting salary, low status of the teaching profession, few vacancies for new entrants, job opportunities in other sectors, and low workloads negatively affect teachers' attraction and retention. The career structure does have some influence, however, as teachers negatively perceive the fact that the first promotion opportunity on the career ladder only comes after four years of service. Interviewees did note that once teachers pass this first promotion point, waiting times for future promotion are shorter, and that higher salaries and increased familiarity with the system can incentivize teachers to remain in the system.

Conclusion

Analysing the established Lithuanian career model has generated valuable lessons relating to the design and implementation of an innovative career ladder. Horizontal and vertical mobility opportunities enable gradual career progression, and teacher promotion allows for more differentiation among teachers. This provides better appreciation and recognition for their work as well as providing opportunities to discover innovative teaching practices. Teacher appraisal allows evaluators to find out what is happening behind classroom doors and to identify good teaching practices, which can then be shared with others. The system's design incentivizes teachers from different schools and municipalities to meet, discuss, and share their ideas. For all of these strengths, after 20 years of implementation it is also possible to clearly identify the weaknesses related to the structure and implementation of the model. These stem mainly from administrative and financial impediments that reduce the structure's effectiveness. However, valuable lessons can be drawn from these issues for further efforts to improve career structures and evaluation processes.

Summary: The organization and management of teacher careers in Mexico

Introduction

The implementation of new teacher career policies adopted as a part of the education reform in 2013 has been subject to intense public debate and coordinated protests from teacher groups, particularly in the southern states of Mexico. While the government and other social actors believe that a new merit-based teacher career structure represents the end of an era of arbitrary promotions, other stakeholders (i.e. teachers, experts, academics, and sectors of the union) highlight the loss of stability, professional rights, and public image of the teacher workforce. Furthermore, the evaluation processes and instruments used to assess teachers are severely criticized. Although new teacher policies received strong public support in 2013, by 2018 the continuous resistance, extension of violent incidents, and implementation problems threatened the continuation of these reforms. The Mexican experience therefore provides several interesting insights on the design and implementation of a new teacher career model.

Reforms and key legislation

Between 1993 and 2012, the Mexican teacher career structure consisted of a path for promotion to management positions and a *Carrera Magisterial* programme (salary progression based on appraisal), both of which were riddled with problems. In late 2012, the newly elected president of Mexico called upon all political forces to commit to a programme of structural reforms that affected many different sectors, including education. Various education reforms were adopted at this time, with the reorganization of teacher careers being one of them. The new career structure was organized by a completely external and centralized evaluation system based on three key legal documents:

1. reforms to the General Law of Education;
2. Law of the National Institute for the Evaluation of Education (INEE);
3. Law of the National Professional Teaching Service.

Organization of the career structure

The teacher career structure in Mexico is based on the following three models:

- Single salary schedule – teachers receive an automatic salary increment every five years that does not depend on appraisal results.

- Salary progression based on appraisal – teachers may receive a salary increase every four years upon successful results in their performance evaluation.
- Career ladder – horizontal and vertical promotion opportunities are available to teachers depending on appraisal results and the availability of vacancies.

Only the two latter points will be discussed, as the single salary schedule has few variables across the system and will not be analysed in depth for this report.

Implementation challenges

Administrative and management challenges

As mentioned above, the Mexican reforms have faced many difficult implementation issues. One of the most problematic aspects of the teacher career model relates to the complexity of the standards, parameters, and indicators that teachers are evaluated against. This complexity means teachers are confused over what is actually being evaluated and how the results are determined. Many also believe that standards should be closer to the actual practices of teachers and school authorities, rather than determined through abstract, external prescriptions. Further, the use of standardized evaluation procedures, involving massive technical processes, classifications, and rankings, are not always able to reflect the complexity of teaching, especially in such a diverse context. The sheer amount of documentation, portfolios, and other evidence uploaded poses serious problems with security and authenticity. Finally, the reforms attempt to introduce more transparent practices into the teacher career management system, which inevitably means an end to certain benefits and privileges for some individuals in the system. This has caused much resistance from those who benefited under the old system.

Participation and communication challenges

A key weakness of the implementation of the new career structure is related to a lack of teacher buy-in and adequate communication. Although the leadership of the main teacher union was consulted and participated in the design of the new career structure, the general perception is that teachers were marginalized in the decision-making process. Criticism emphasizes the exclusion of teachers from the design of the reform and highlights the punitive nature of evaluation procedures that critics consider will not contribute to better teaching practices.

	Career ladder	Salary progression based on appraisal
Main features	There are two options under this model: • Option 1: Under horizontal mobility options, teachers can be promoted to teaching support personnel positions to provide counselling, tutorship, and support to other teachers. • Option 2: Many vertical mobility positions are available to teachers, including school principals, vice-principals, school coordinators of extracurricular activities, supervisors, regional chief supervisors, chiefs of teaching, and pedagogical advisors.	• The salary spine consists of seven grades where the salary increase is determined as the percentage of a basic salary. • Salary increments are higher in poor and rural areas as incentives to attract teachers. • Every four years teaching professionals are evaluated and therefore eligible for an increase in their salary. Any pay rises are initially temporary (four years) but can become permanent upon successful future appraisals. • The assignment of additional hours of teaching is also possible for those contracted by weekly hours after an appraisal.
Criteria for progression	Option 1: The selection process consists of a public competition. Selected teachers undergo an induction period for two years, after which they are evaluated. Depending on the results, teachers are either appointed permanently to this position or return to their previous positions. Option 2: A set of standards is defined for each position, taking into consideration the level and type of service. There are over 60 highly prescriptive sets of profiles, parameters, and indicators. The competition is public and consists of a competitive examination and a review of relevant documentation.	Salary upgrade depends on the results of teacher appraisal. These appraisals focus on five key competencies: 1. knowledge of students and what they should learn; 2. organization of teaching and of relevant didactic interventions; 3. ability to reflect on teaching practices and adapt to student needs; 4. knowledge of legal and ethical responsibilities; 5. participation in school and community activities which create a conducive environment for student motivation and success.
Tools	Options 1 and 2: Candidates take two standardized multiple-choice examinations: 1. knowledge and skills of professional practice; 2. intellectual skills and professional ethics. Different versions of the exam are used for teachers depending on their specialization and teaching level.	Tools used are: • report on professional responsibility issued by the principal or supervisor; • portfolio of teaching evidence, consisting of student work examples; • examination of pedagogical knowledge and didactic competence; • lesson planning examples; • examination of content knowledge by subject.

	Career ladder	Salary progression based on appraisal
Evaluators	For both options 1 and 2, examinations are administered centrally.	Evaluation is completely external and centralized with a marginal role assigned to school authorities. Exams are graded automatically, whereas portfolios and lesson plans are evaluated by teachers and principals who were prepared and certified by the INEE and who have at least three years of experience.
Type of evaluation	Options 1 and 2, cumulative and norm-referenced evaluation.	Cumulative and norm-referenced evaluation.

Perceived effects

There is still no robust evidence on the perceived effects of the reform. The main strength of the new teacher career structure is its shift from the inertia of an automatic career progression to a merit-based route for both entering and progressing in the teaching profession. However, even though there seemed to be a positive initial reception, it was increasingly perceived as an authoritarian, punitive, and repressive set of new rules. Beyond the strong opposition to merit becoming the criterion that defines careers, there were also objections to the concept of standardization due to the diversity and inequalities that characterize the country. A stringent, mandatory evaluation and the possibility of dismissal for teachers due to a poor evaluation led to an undermining of the model's formative aspect. Union members also worried that individual incentives would compromise solidarity among teachers and their commitment to their students. However, the aspect that generated the strongest dissatisfaction among teachers is related to poor implementation processes, as noted above.

Some respondents believe that the new career model will have a positive impact on teachers' attraction and retention with time. They think teaching professionals will realize that personal effort will be compensated systematically, and key issues of continuity, effective implementation, and respect for regulations will continue to be addressed. Nevertheless, it has been noted that, at present, teaching does not always attract candidates for the desired reasons. Some join teaching because of the lack of available employment opportunities elsewhere. This makes analysing the attractiveness of the teaching profession difficult, as it often depends on the wider context and job availability in other sectors.

Conclusion

The proposed changes of the 2013 reform may promote the development of the teaching profession and put an end to corruption in selecting positions, but the associated cultural change will undoubtedly be slow and contentious. The main demand from opponents is for a revision of standardized examination formats in favour of an evaluation mode that is capable of capturing what the teacher does with specific students and in particular circumstances. Weaknesses arising from the implementation and management of this policy and the lack of capacity to implement a complicated reform has resulted in increased teacher dissatisfaction. The INEE admits that the current system is encountering significant challenges and it is considering potential modifications to evaluation modes, evaluators, and tools. However, this process is ongoing as of 2019, and it is not clear what exact changes will be introduced.

Summary: The organization and management of teacher careers in New York City

Introduction

Looking to use money from a federal government initiative encouraging incentivized teacher pay, the New York City Department of Education (DoE) joined with the local teachers' union to propose the Teacher Career Pathways (TCP) programme in 2012. It sought to differentiate pay among teachers and move away from solely following the existing single salary schedule. The new programme designed three new teaching roles, each with different responsibilities that corresponded to increases in pay. The design specifically sought to foster collaboration and mentorship, and strove to keep the highest achieving teachers in the classroom. Of special note, this programme did not replace the old single salary schedule, but instead was implemented alongside it to provide teachers with more career options. Therefore, unlike other system-wide reforms, this programme was completely voluntary and thus non-threatening to the workforce.

The Teacher Career Pathways programme

The TCP programme did not involve a whole system reform: our research investigated only one programme among others. The TCP programme was jointly proposed by the New York City DoE and United Federation of Teachers (UFT) in 2012. An initial pilot programme began in 78 schools in 2013 before expanding in subsequent years.

Organization of the career structure

The TCP programme established new teaching roles added to the existing single salary schedule.

- Career ladder: the initial design called for two additional Teacher Leadership positions that involved additional responsibilities for classroom teachers. A third role was established by 2015 after feedback from the pilot study. All teachers in these positions remained in the classroom, but with additional responsibilities.
- Single salary schedule: an annual salary increase is available for all teachers independent of their performance. This is the established career structure for all schools and all teachers in New York City, but this report will not examine it in detail.

Career ladder
Main features	The current version has three pathways for classroom teachers to promote, collectively known as Teacher Leaders (TLs). Each has specific responsibilities: 1. Model Teacher: teachers lead from the classroom by purposefully sharing effective teaching strategies with colleagues, in open classrooms. 2. Peer Collaborative Teachers: teachers promote a collaborative environment and support their colleagues through focused coaching, intervisitations, and designing of meaningful opportunities for professional growth. 3. Master Teachers: teachers work closely with school and/or district leadership to improve peer learning and instruction by sharing best practices and through peer coaching. Additionally, a Teacher Team Leader (TTL) position was developed to provide mentorship and support to TLs. These TTLs were pulled out of the classroom to provide full-time support to the TLs around the district.
Criteria for progression	Initially, teachers must go through a three-step application process to become a TL. These include: 1. an online application in which applicants must answer questions and upload artefacts designed to assess their instructional practice; 2. review of these applications by a joint committee of the DoE and local teachers' union; 3. an in-person interview conducted by TTLs. Every TL must go through a requalification process every two years, no matter their performance. Additionally, there are two steps to becoming a practising TL. The first is qualification through the above process, while the second involves selection at the school level by the TL's principal. Simply qualifying as a TL does not mean the teacher will actively serve in that role.
Tools	To be considered for a TL position, teachers must be graded as highly effective or effective on the advance rating system. This system applies to all teachers who work in the DoE and is comprised of two components: 1. evaluation of lessons observed by principals: comprises 60 per cent of the assessment and is based on the Framework for Teaching, also known as the Danielson Framework. This is a comprehensive, research-based framework in which principals make multiple classroom visits and grade a set of pre-established criteria. 2. growth in student learning: comprises 40 per cent of the assessment and is based on standards that are decided at the individual school level. As part of the requalification process every two years, TLs must submit teaching artefacts and answer questions on what they did in their role.
Evaluators	For initial entry into the system, DoE officials, local union leaders, and TTLs oversee the process. For continued evaluation and requalification, principals and school officials play the biggest role.
Type of evaluation	First stage (through interview process) – criterion-referenced and cumulative. Second stage (through principal selection) – norm-referenced and holistic.

Implementation lessons

Administration and management

Overall, the TCP programme has found a good deal of success and been popular from its inception. Important factors of the programme's success are the focus on teacher collaboration and trust, the partnership with the UFT, the balance between support and accountability structures and their separation, and the ongoing monitoring of the programme allowing the DoE to identify problems and take immediate actions to address them.

However, a couple of implementation challenges have emerged that are worth reviewing. Some TLs have complained about workload, as their individual principals have used their title as a means to add responsibilities, even if they are outside the scope or design of the programme. Other teachers thought the advance rating system for evaluation could be subjective, with unclear differentiation on the difference between 'effective' versus 'highly effective', for example. Some principals also found the evaluation system extremely time-consuming and struggled to complete other tasks because of this.

Financial challenges

Due to a changing yearly budget at each school, TLs are only guaranteed to serve in their role for one year at a time. Thus, this programme only offers tentative and potentially finite career pathways, leaving teachers uncertain about their future role. Other teachers noted that they were being paid for one level of TL position, but actually taking on the roles and responsibilities of a higher level that should have provided a higher salary. Finally, since the programme began with the help of a federal grant, schools have been scrambling to find funding to continue TCP into the future. Several principals noted that they would continue with it if they could, but simply lacked the funding to do so.

Perceived effects

To better understand the effects of the programme, an outside evaluation firm administered the questionnaires to teachers and principals. Many key aspects of the programme emerged. First, it increased a sense of agency, or ability for teachers to make their own choices. The option to pursue promotion while staying in the classroom and getting to make their own decisions on whether to enter the programme greatly enhanced these feelings. Due to the nature of the design, peer collaboration and mentorship also increased under TCP. Teachers felt more compelled to

work with their peers and felt this strengthened their teaching practices. In conjunction with this, the data showed that teachers who work with TLs improve their instructional practice at a faster rate than those who do not. In this way, the TLs also served as important professional development facilitators. Some respondents even went so far as to describe a culture shift in their schools characterized by teachers working together to improve student achievement.

While the principals surveyed had mixed responses on whether the programme helped attract new teachers, the vast majority (81 per cent) thought that it helped retain their best teachers. The data indicated that retention is improved for both the TLs and the teachers they work with on a regular basis. This aligns with the results that show TLs feel valued by both school leaders and their colleagues, indicating a high level of satisfaction with the position.

Conclusion

Overall, the TCP programme was viewed positively by teachers and school leadership. Through open dialogue and feedback from teachers and the local union, designers continuously updated the programme to best suit the needs of teachers and schools. This adaptive approach proved vital in implementing an effective structure. The eventual results of these efforts enabled teachers to feel more empowered and to work in a collaborative, supportive environment aimed at promoting student success. All school personnel seemed to greatly approve of this programme, including principals, the supported classroom teachers, and the TLs themselves.

While this example certainly provides many ideas for implementing career reforms in other locations, its unique circumstances must be considered. This programme merely supplemented the established career structure and did not replace it. Combined with its voluntary status, this meant that teachers did not feel threatened by the programme and could simply continue as they always had if they so chose. It has also found financial support through a temporary federal grant, putting its long-term financial feasibility and status in question. Even so, the positive results and feedback from this programme cannot be ignored, and planners in other contexts would do well to understand where New York City found success and build on these ideas in the future.

Summary: The organization and management of teacher careers in Peru

Introduction

Peru adopted a teacher career reform in 2012 as part of a national effort to increase value in the teaching profession and restore confidence in the state's capacity to efficiently implement the career structure. The Teacher Reform Law (*Ley de Reforma Magisterial* or LRM) specifically aimed to harmonize previously existing regulations where teachers belonged to different pay systems and career frameworks. It therefore introduced a new teacher career structure providing the same requirements, rights, and opportunities for all public service teachers. In line with the previous teacher career structure, the LRM links teachers' promotion and salary increases to their professional performance. The reform design put strong emphasis on setting up clear horizontal and vertical career paths and evaluation procedures.

Reforms and key legislation

The current key document that organizes teacher careers in Peru is the LRM, adopted in 2012. It is a national regulation that standardizes the career progression of all teachers in public schools. Before the reform of 2012, different teacher groups were regulated by different teacher career models. The largest number of teachers belonged to a framework established by *La Ley del Profesorado* (LP, 1984), whereas those who began teaching after 2007 worked under *La Ley Carrera Pública Magisterial* (LCPM, 2007). Previous differences in regulations, promotion methods, and salaries had an impact on the construction of the identity of teaching staff in the country. The reform of 2012 unified these frameworks and introduced important changes to the career model that had been in place since 2007.

Organization of the career structure

The teacher career structure in Peru consists of a career ladder, which includes two different pathways for teachers' promotion (pedagogical management and institutional management); salary progression based on appraisal, through which teachers can increase their professional status and move to higher salary grades; and a bonus pay model that allows teachers to receive various bonuses in relation to their performance and professional path.

	Career ladder	**Salary progression based on appraisal**
Main features	Initially, all new teachers must start their career by teaching in the classroom. After the first three years of service, they can move to one of the four streams (voluntarily). At the time of writing, two streams had not yet been implemented. • Pedagogical management (counselling, peer training, student counselling, academic coordination, and leadership). • Institutional management (director of the pedagogical management section; education specialist at the DRE* and UGEL;** principal or vice-principal of a school; director of the UGEL). • Teacher education (not yet operational). • Innovation and research (not yet operational).	The LRM (2012) lays down a salary spine with eight levels (Grades I–VIII).
Criteria for progression	• Pedagogical management stream: Teachers need to be at least in the second grade of the pay spine. The competition process is conducted at school level. • Institutional management stream: Teachers access these positions through a national competition organized by the MoE along with local governments. Evaluation looks at the professional and personal competencies required for the position. Depending on the managerial position, candidates need to be situated between the third and the eighth grade in the pay spine. New responsibilities are undertaken and, while the teacher does not access a different grade in the pay spine, their monthly salary increases.	• Years of service as a teacher and in the current grade. • The last ordinary teacher performance evaluation (*evaluación de desempeño*) that a teacher needs to have passed. • The evaluation specifically dedicated to assess whether a teacher can receive a salary increase (*evaluación de ascenso*). • Grade VII requires a master's degree whereas Grade VIII asks for a PhD degree.

	Career ladder	Salary progression based on appraisal
	In both cases, teachers are evaluated (*evaluación de desempeño en el cargo*)after three years to determine whether they remain in their current position or return to the previous one.	
Evaluators	A committee for promotion (*Comité para el Acceso al Cargo*) is formed to evaluate teachers who want to access the new managerial positions. The composition of the committees varies for each specific position.	The Committee of Evaluation is formed. It is led by the director of the UGEL or the director of the pedagogical management section, an administrative staff specialist, two education specialists, and one representative of *Consejo Participativo Local de Educación* (COPALE). The evaluation can also be conducted by a third party (a company or university) that needs to win a bid. In this case, the committee consolidates the evaluation results.
Tools	Evaluation tools vary depending on the managerial position. The first phase usually consists of solving case studies or reading comprehension. The second phase uses tools such as interviews, simulations, and professional background checks that look at merits, professional qualifications, and work experience.	A test and a professional background check are used. The latter evaluates the professional qualifications and achievements of a teacher, which involves: • postgraduate studies; • second specialization; • an ability to update one's knowledge and participate in training; • recognition of tasks conducted; • awards obtained; • intellectual production; • teacher subject knowledge; • knowledge regarding pedagogical theory.
Type of evaluation	Cumulative and norm-referenced evaluation.	Cumulative and norm-referenced evaluation.

Overall, the Peruvian teacher career system has four kinds of evaluation in place (to enter the profession; to receive a salary increase; for promotion; and at the end of the term for promoted posts). A fifth kind of evaluation called ordinary performance evaluation, which is in the process of being implemented, will take place every three years and will be mandatory. It will not allow for a salary increase or promotion, but will determine whether a teacher keeps their position or is dismissed.

* DRE stands for Direcciones Regionales de Educación. ** UGEL stands for Unidades de Gestión Local.

Implementation challenges

Administrative and management challenges

Through the implementation of the new reform, Peru has faced a variety of administrative and management challenges. The entire implementation of the evaluation system has been delayed due to its size and complexity. The evaluation will measure the performance of every teacher and has thus faced major challenges relating to the human resources required to support the evaluations, technical functions, security, and control of measurement instruments. Complaints have also stemmed from the lack of clear standards for different types of teachers in the evaluation. With regards to entry evaluation, the current design reduces the chances of employing a full complement of new teachers. There are too many candidates for the better-situated positions (in urban areas, capitals of departments, etc.), but very few for more rural or remote areas. Consequently, many vacancies remain unfilled (approximately 50 per cent) because the system does not allow for the re-orientation of candidates who pass the first evaluation round to areas where they did not apply. A need to attract, motivate, and retain good teachers has led to the introduction of a multitude of different bonuses, awards, allowances, and incentives. However, the number of such programmes has led to difficulties in incorporating them to form one coherent teacher career structure.

Financial challenges

Financial issues have also caused issues with the new structure. The reform of 2012 reallocated teachers from previous systems into the new teacher pay spine. However, some of them continue to receive salaries defined by the previous systems, causing great frustration. Other issues have come from delays in issuing new salaries or getting teachers placed in the appropriate pay category.

Participation and communication challenges

In the design of the new law, priority was given to consulting specialists and experts on the subject over other stakeholders. While the MoE created and used many different technological tools to communicate with teachers and various stakeholders, the role of teacher representatives was reduced when it came to the implementation and supervision of the reform.

Perceived effects

The reform of 2012 led to a new national interest in public education, more clearly defined standards of evaluation, and a concentration of functions and responsibilities related to teacher careers in one coherent line of action. The fact that teachers can participate in school management and other activities gives additional value to their work. Additionally, the possibility of a salary increase based on appraisal allows the majority of teachers to remain teaching in the classroom, instead of seeking promotion to other positions. The reform also allowed teachers to clearly identify institutions responsible for teacher career regulation and implementation. The Ministry of Education has tried to give a new value to teacher work and to strengthen its relations with teachers. These aspects contributed to creating a workspace that is more respectful and participative, and thus highly motivating for teachers. However, certain aspects, such as delays in evaluations for receiving a higher salary and complexities in aligning the many previously existing systems, have negatively influenced teacher motivation.

The two most important issues affecting attraction were the reduced dispersion of salaries along the salary spine and low salaries in general. However, the problem now appears to be improving, even though salary levels are still considered low. Better working conditions and improved transparency of evaluations have also contributed to increasing the attractiveness of the profession. While it is too early to evaluate the retention capacity of the new reform, teacher job security and high unemployment rates in the country are important factors that encourage teachers to stay in the profession.

Conclusion

The reform of 2012 aimed at attracting the best candidates with exemplary qualifications so as to guarantee quality education throughout the country. The new reform was supported by a wide range of stakeholders, such as public institutions, media, experts, and the general public, which ensured its political and economic sustainability. The Ministry of Education, through improved communication, tried to generate positive public opinion regarding what it means to be a teacher in a public school in order to better recognize and appreciate their work. The reform also aimed to change the situation in which different teachers were regulated by very different regulatory norms and received differentiated salaries for the same tasks. In addition, the atmosphere of confrontation and corrupt practices

that existed in previous evaluations was addressed. Nevertheless, various implementation challenges should not be overlooked, as they continue to negatively affect the capacity of the reform to yield positive results.

Summary: The organization and management of teacher careers in Scotland

Introduction

Teacher careers have been a widely discussed subject in Scotland, particularly in response to various changes to the career structure, with major overhauls occurring in 2001 and 2011. Despite some areas of discontent, satisfaction with the management and organization of teacher careers appears to remain high, and Scotland has few issues with teacher attraction and retention. Compared to other countries, Scotland finds itself in an enviable position: teaching is still perceived as a high-status profession, there are no serious teacher shortages (except in a few secondary subjects), and teachers tend to remain in the profession once they join.

Reforms and key legislation

The first key agreement in Scotland's teacher career reform, 'A Teaching Profession for the 21st Century', came in 2001 and shaped teacher pay and conditions for the following 10 years. This new structure came in response to a commissioned report from Gavin McCrone in 2000 that found Scottish teachers to be overworked and underpaid. In 2011, another review into teacher employment called 'Advancing Professionalism in Teaching' was commissioned by the Scottish Government, this time chaired by Professor Gerry McCormac. It led to an update of the measures established in 2001. These two reports and the responses to them mark significant turning points regarding teacher careers in Scotland. It is important to note that the first review recommended creating a chartered teacher status (explained below). However, due to a number of challenges the programme was discontinued, and no new entrants have been accepted since 2011.

Organization of the career structure

Prior to 2001, a combination of a single salary schedule and a complex career ladder made up the Scottish teacher career structure. The career ladder had a multitude of positions available in secondary schools and very few in primary schools. The new reforms thus divided the ladder into four roles across all levels of teaching to standardize and simplify the system. Additionally, the chartered teacher programme was established as a means of providing salary progression based on appraisal for classroom teachers. This programme aimed to keep the best

teachers in the classroom, as many promotion posts previously involved management positions and thus leaving the classroom. The table in this section outlines the career structures established after the 2001 reforms.

	Career ladder	Salary progression based on appraisal (chartered teacher [CT] status)
Main features	• The promotional structure consists of four roles: classroom teacher; principal teacher; deputy head teacher; and head teacher. • Pay spines for each of the promoted posts consist of a series of points where the only way to move upwards on the pay spine is to take on more responsibility and be reallocated to a new point based on a job-sizing toolkit.	The programme consisted of awarding salary increases to teachers who participated in a robust professional development programme. It was introduced to reward teachers who remained in the classroom and encourage those at the top of the main pay scale to undergo professional development activities.
Criteria for progression	• appropriate qualifications; • previous experience; • record of CPD; • evidence of ability to work with and lead other people; • evidence of leadership and management skills; • evidence of good communication skills; • evidence of ability to implement change; • evidence of good interpersonal skills.	• professional values and personal commitments; • professional knowledge and understanding; • professional and personal attributes; • professional action. There were two ways that a teacher could achieve CT status: 1. by embarking on a four-year programme with a university, consisting of 12 modules; 2. by applying to have their prior learning recognized as meeting the standard.
Tools	Candidates' application forms and references are screened, and shortlisted candidates are invited to an interview. They may also be asked to present on a topic, prepare a paper on an educational issue, or be observed in a group discussion.	Option 1: Each study module is evaluated using the following tools: reports of work-based observation; self-assessment; inputs from students, such as evaluation data or examples of students' work; reports from peers, managers, and/or external assessors; and professional materials produced by the teacher. Option 2: Teachers could claim credit for any prior learning or other experience of meeting the standards of study modules via a portfolio and a reflective report.

	Career ladder	Salary progression based on appraisal (chartered teacher [CT] status)
Evaluators	An appointment committee evaluates candidates and decides on the promotion. Its composition depends on the role to be evaluated (higher administrative levels are more involved for higher positions).	Option 1: representatives from the university. Option 2: National Assessment Panel – a body of assessors appointed by the General Teaching Council for Scotland.
Type of evaluation	Holistic and norm-referenced evaluation.	Cumulative and holistic, criterion-referenced evaluation.

Implementation challenges

The career ladder model

As the reforms of 2001 changed the number of positions on the career ladder, some concerns developed relating to the design of the new structure. For example, the roles of assistant head teacher and deputy head teacher were combined into a single senior management role, and some teachers were not fully prepared to occupy this position. Other issues resulted from the reassignment of teachers to a career ladder system with fewer promoted posts at secondary level. Teachers who had been in roles that were cut were disappointed that they had to take less prestigious positions. Although these teachers were offered salary conservation for three years, it made them reluctant to apply for any new roles during this time, where a move could result in a decrease in salary. Finally, reduced local authority budgets resulted in attempts to save money by reducing the number of promotions and increasing the responsibilities of existing positions, which further sowed discontent among teachers.

Chartered teacher status

The Chartered Teacher Programme faced several serious implementation issues, which eventually led to the discontinuation of the programme in 2011. Most problematic was a lack of communication among different administrative levels. Teachers did not need approval from their schools or councils to take part in the scheme, and, in some cases, did not even let their employers know. Critics also claimed there were too many academic criteria attributed to chartered teacher status, and many participants in the programme were not seen as being the 'best teachers'. This was related to the perception that the course and related assessments were overly academic and did not sufficiently recognize good classroom

practice. Financial burdens on local authorities proved difficult to foresee and plan for. Local authorities had no control over the number of teachers qualifying, and therefore no control over the costs, which could be significant. Lastly, the programme was exceedingly costly to the participating teachers both in terms of workload and money. The combination of the initial cost and the associated course work made it difficult for younger teachers and those with young families to participate in the programme.

Perceived effects

The perceived effects of the career ladder and chartered teacher status on teacher attraction, motivation, and retention are varied. As evidenced in the McCormac Review, the four-tier career ladder structure has generally been touted as beneficial, particularly for primary teachers. The introduction of the principal teacher post helped to address the issue of limited management opportunities at that level. At the same time, a universal demotivating factor has been the reduction in promoted posts by local authorities, leading to frustration among teachers because the number of opportunities for career advancement has diminished over time. While teaching has remained an attractive profession, as evidenced by the continuing high numbers of applicants for teacher training centres, changes in the career structure have not been seen as having a significant effect on retention. In fact, some believe that the reduction in promoted posts and resultant increase in workload at each level may have prompted teachers to seek alternate professions. Some also believe that the effects have been rather 'neutral'.

With respect to the chartered teacher model, the programme was initially seen to be highly motivating for teachers, as it revitalised their self-worth and professional self-esteem while inspiring enthusiasm for research in education. Unfortunately, the many implementation problems gradually weakened the programme's credibility and, consequently, it was discontinued.

Conclusion

In 2001, when McCrone reviewed the teaching profession with a view to its role in the 21st century, he found the profession to be demoralized and underpaid, and the career management disorganized. Both the updates to the career structure and associated pay increases across the board for all teachers seemed to improve these issues. A further study in

2011 found the teaching profession in a much healthier situation, with general approval of the reforms and an updated career ladder. However, that study also found numerous issues with the Chartered Teacher Programme, and its recommendations led to the programme shutting down. This failure to properly execute the Chartered Teacher Programme (which was an otherwise powerful idea) provides important lessons with respect to better definition of roles, selection procedures, and financial sustainability of teacher career models.

Summary: The organization and management of teacher careers in South Africa

Introduction

Over the last 20 years, the organization and management of teacher careers in South Africa has featured prominently as the focus of massive, system-wide education restructuring efforts that have taken place. Changes made to the system have aimed to institutionalize a career scheme that enables all teachers to reach their professional potential and contribute in ways that are necessary for building a quality education system for all. From a positive aspect, teachers have gained under the new system through attractive starting salaries and better benefits. However, issues such as multiple policy changes and poor implementation, increased administrative work, and the poor infrastructure and socio-economic issues impacting many schools, especially in rural areas, still undermine the attractiveness of the profession.

Reforms and key legislation

Many legal documents shape the teacher career structure in South Africa. The following are the most noteworthy:

1. The Employment of Educators Act (EEA) of 1998: outlined the broad conditions of employment for teachers at all public schools. The most recently published Personal Administrative Measures (PAM) (2016) of the act outlined in detail the employment conditions of all teachers, including the career structure and the rules governing their mobility, remuneration, and advancement within it.

2. The National Qualifications Framework Act (no. 67 of 2008) and Revised Policy on the Minimum Requirements for Teacher Education Qualifications (2015): formalized and consolidated teacher career pathways and fully aligned teacher qualifications to the higher education qualifications framework.

3. Integrated Quality Management System (IQMS) (informed by Schedule 1 of the EEA 1998): combined the existing quality management systems in the education field into one integrated evaluation and management mechanism.

Organization of the career structure

The current teacher career scheme is relatively sophisticated and complex. It relies on strategies relating to the following teacher career models:

- Career ladder: both horizontal and vertical mobility opportunities are available to teachers. They can choose from three different career streams and move within or across them. Teachers can continue as practising teachers in the classroom and seek promotion in the teaching and learning stream (i.e. being promoted to higher teacher levels). They can also be promoted to one of the two other streams (the management and leadership stream, or the educational planning, research, and/or policy development stream) where teaching in the classroom is no longer central to the job.
- Salary progression based on appraisal: a 1 per cent 'notch' increase is available for all teachers if their annual performance evaluation meets a minimum level of 'satisfactory'.
- Single salary schedule: an annual salary increase is available for all teachers independent of their performance. In addition, teachers also receive a 1 per cent salary increase for every three years of service.

The salary scale for educators consists of 221 notches. There are five main ways to reach higher salary notches: (1) one notch annual cost of living increase awarded to all teachers irrespective of status, position, and quality of practice; (2) one notch increase for every three years in the profession; (3) one notch increase for all teachers whose outcome is 'satisfactory' in the annual evaluation process; (4) a salary increase following a teacher's promotion to a more senior position, within any of the three career pathways; (5) salary can also increase if teachers upgrade their qualifications.

	Career ladder	Salary progression based on appraisal
Main features	• There are three career streams for current and prospective teachers: 1. a *teaching and learning stream* – to advance as a practising teacher within the classroom; 2. a *management and leadership stream* – to move into management and leadership positions within the school and education system; 3. an *educational planning, research, and/or policy development stream* – to pursue a more academic path and in this way contribute to the profession.	Teachers are evaluated annually, and successful evaluations result in a one-notch salary increase. It is important to note that this evaluation is part of the performance management aspect of the broader IQMS.

	Career ladder	Salary progression based on appraisal
	Each of the streams includes multiple promoted posts with different responsibilities. The teacher career model allows for movement both within and between the three different streams once teachers have progressed to the level of senior teacher and their corresponding skill levels and years of experience.	
Criteria for progression	Each position in the above-mentioned streams has a number of specific requirements related to a level of education and years of work experience.	Teacher evaluation results are the only aspect taken into account for this type of salary increase. Twelve performance standards are identified:
	Evaluation of the candidate's competencies for a new role involves recognition of factors such as qualifications, professional development, experience, and statutory requirements. In addition, a teacher appraisal score in the evaluation under IQMS is taken into account. Teachers must also be able to prove that they have participated in personal development, workshops, and other processes.	1. creation of a positive learning environment; 2. knowledge of curriculum and learning programmes; 3. lesson planning, preparation, and presentation; 4. learner assessment; 5. professional development in field of work/career and participation in professional bodies; 6. human relations and contribution to school development;
	Each post has a minimum threshold score which must be attained, and specific criteria exist for different positions.	7. extracurricular and co-curricular participation; 8. administration of resources and records,
	Movement from one post level to a higher one is through application for vacancies. Beyond the position of senior teacher, teachers must achieve a post-basic qualification recognized by the South African Council of Educators. Also, management professionals need to complete courses in school management.	9. personnel; 10. decision-making and accountability; 11. leadership, communication, and servicing the governing body; 12. strategic planning, financial planning, and education management development.

	Career ladder	Salary progression based on appraisal
Tools	A review of documents confirming qualifications, professional development, experience, and statutory requirements. In addition, a teacher appraisal score in the IQMS (described in the right-hand column) is also taken into account.	1. Teachers have the opportunity to fill in a pre-evaluation form which explores the teachers' own perspectives. 2. Elements reviewed in the evaluation include: • lesson observation; • relevant documentation, such as teacher portfolio or evidence of CPD activities; • articulation of any grievances or challenges the teacher feels may affect evaluation or performance; • personal growth plan to improve on and respond to the findings of their baseline evaluation.
Evaluators	• Interview committees (comprising representatives from the Provincial DoE, teaching staff, unions, and management/school governing board (SGB) members must be convened by the SGB. They then rank candidates in order of preference and submit this to the SGB, which creates a shortlist for the head of department to consider. • School-level evaluators are responsible for the IQMS evaluation.	• Involves the participation of the principal (or the teacher's supervisor), the teacher, and a fellow teacher (a peer). • The results of the appraisal process are consolidated and submitted to the Provincial DoE.
Type of evaluation	Movement from one post level to a higher one is through application for vacancies. Beyond the position of senior teacher, teachers must achieve a post-basic qualification recognized by the South African Council of Educators. Also, management professionals need to complete courses in school management.	Cumulative and criterion-referenced evaluation.

Implementation challenges

Administrative and management challenges

With the complex nature of the career structure, several implementation challenges have arisen. Issues relating to the operationalization of the teaching and learning stream have stemmed from a lack of clear criteria to guide decision-making on 'good teaching'. The Senior/Master Teacher

distinction became quite costly, as it was based on years of experience and thus resulted in an automatic promotion that principals would rubber stamp. These teachers also largely refused to take on more administrative or managerial responsibilities because they believed this was not the reason the promotion was granted in the first place. Several challenges arose in implementing effective teacher performance appraisal through the IQMS, including issues with consistency, confusing appraisal instruments, lack of formative evaluation, and lack of training for evaluators. Finally, issues developed with regards to the composition of the appraisal team, as it created tensions between the teacher and principal, or problems of peers being 'too close' to the teacher being evaluated.

Financial and communication challenges

Further issues occurred in communicating the details of the implementation and in financing the structure. Old inequalities between schools remained, as wealthier schools are able to attract better-qualified teachers. These wealthier schools can allocate incentives and rewards at their budgetary discretion, while poorer schools are unable to do so. Provincial budgets are also constrained, and thus limited resources are allocated to give effect to some of the new roles envisaged in the different pathways. Lastly, inadequate communication around key policies affecting teacher careers remains a key concern for teachers. This leads to a lack of common understanding of these policies and how to best put them into practice.

Perceived effects

Aside from economic concerns, teachers in South Africa are largely motivated or discouraged by the environment and contextual circumstances in which they work. In addition, teachers' motivation is hindered by the emphasis on teaching for assessments, often under difficult circumstances, rather than on their ability to teach holistically and with adequate support. It is also believed that salaries do not increase adequately throughout careers, negatively influencing teacher motivation.

Despite some negative attitudes towards the profession, graduates from teacher education programmes have nearly doubled in the period from 2009 to 2013. This is partly due to the establishment of national incentive schemes, such as the Funza Lushaka bursary that was established in 2007 and provides full-cost bursaries for prospective teachers in priority education cycles and subjects and in rural areas. Other

motivating factors include job availability, security of employment, and the attractiveness of a comprehensive salary package for professional teachers when compared with similar professional occupations for which bursaries may be limited or unavailable. The higher starting salary relative to other professions also made it attractive for prospective teachers, and the importance of minimum standards for entry has been a key driver of the improvement in teacher quality.

Conclusion

The teacher career structure in South Africa involves complex policy mechanisms and processes at almost every stage. While this is intended to ensure adequate support and development of teachers, significant implementation challenges have been encountered. The capacity of different stakeholders to put the system into practice is uneven, which is compounded by the lack of clarity and understanding of policies such as the IQMS. This lack of codification makes the system subject to the various interpretations and impressions of those involved. A better understanding and more effective implementation of the IQMS seems to be key to resolving a number of ongoing challenges.

Summary: The organization and management of teacher careers in Thailand

Introduction

Making the teaching career attractive and professional has been one of the major preoccupations of teacher policy reforms in Thailand since the enactment of the first National Education Act in 1999. Thailand has adopted a number of reforms in order to make the teaching career more attractive to able candidates. The career has been restructured and organized into different streams, and salaries have been upgraded several times to match those of other similar occupations. While there are still areas of discontent, notably with regards to appraisal processes, the reforms have been successful in reversing the decline of the status of the profession.

Reforms and key legislation

The National Education Act 1999 (amended in 2002) laid the foundation for regulatory changes in many different areas of education management. It led to the adoption of the Teacher and Education Personnel Act (2004), which became the main legislative document related to the organization of teaching careers. This act introduced a new teacher career scheme that established four different streams and additional professional status levels within each of them. It also created the *Teacher Civil Service and Educational Personnel Commission* (TEPC), developed a new teacher salary scheme separate from that of other civil servants, and increased salary levels substantially. In addition, the Teacher and Educational Personnel Council Act (2003) created the Teacher Council of Thailand (TCT) and the Committee for Promotion of the Benefits and Welfare of Teachers and Educational Personnel. It also established the teaching licence system and increased the length of pre-service training from four to five years.

Organization of the career structure

The career structure in Thailand is composed of a four-stream career ladder model and salary progression based on appraisal, which includes separate internal and external evaluation phases intended for pay increases and professional advancement respectively.

	Career ladder	**Salary progression based on appraisal**
Main features	Thai public teachers can choose from four different streams for their career progression: 1. teaching; 2. school directing; 3. education management; 4. educational supervision. Teachers can stay in the teaching stream (that they first access as civil service teachers) or can apply to different streams after having met certain requirements. Each stream is associated with different responsibilities.	Two separate mechanisms associated with different evaluation procedures are in place: 1. Biannual salary increase: teachers are evaluated biannually through the mandatory appraisal process. The resulting salary increase is financed by an automatic increase of 6 per cent allotted to schools to be distributed between teachers. 2. Teachers can apply for higher professional levels (within each career stream) which are associated with a higher base salary and extra professional allowances and compensation every month. Six levels exist and the lowest two (assistant and level 1) are available only for teachers.
Criteria for progression	The following are the necessary criteria to change from teaching to: • school directing: at least Level 2 teacher status, a successful work assessment, and years of work experience that depend on the degree held while entering the profession; • education management: having worked as vice education administrator for at least one year, successful appraisal results, and having a salary higher than the base salary of Level 4 teachers; • education supervision: six years of work experience at Level 1, a licence for educational supervision, having passed the examination which evaluates general knowledge and laws, competency for the position, and job knowledge.	Option 1: Teacher salary increments* depend on evaluation scores: • range of 90–100 per cent: one-step salary increment; • range of 60–89 per cent: half-step salary increment; • lower than 60 per cent: no salary increase. Option 2: Moving up to the next professional level requires passing an evaluation process and acquiring a minimum number of years of teaching experience. Teachers must obtain a minimum teaching load, improve teaching quality, and pass all three evaluation criteria (ethics and morality; competency; quality of teaching performance) to apply for progression.

	Career ladder	**Salary progression based on appraisal**
Tools	In all three cases, the first step of selection consists of an examination which tests three work-related aspects: general knowledge and related law; job-related and administrative competence; and past job performance. For Options 1 and 2, successful candidates (with scores higher than a designated percentage) are then called for an interview, which also has a certain weight.	Option 1: evaluation is strongly governed by school directors' observations based on performance assessment forms. Option 2: an assessment form and the review of the documentation provided by a teacher.
Evaluators	For Option 1: examinations are issued by the Office of Basic Education Commission, while the evaluation is conducted by the local TEPC. For Option 2: local TEPC is responsible for conducting the evaluation.	Option 1: for the teaching stream, teachers are evaluated by the school principal or school committees. Option 2: for Level 3 professional status and below, members of the reviewing committees (consisting of a school director and teachers at the local educational service area) are approved by the local TEPC. The central TEPC reviews candidates' documentation and approves the salary increment. For Levels 4 and 5, reviewing committee members are chosen and approved by the central TEPC.
Type of evaluation	Cumulative and norm-referenced evaluation.	Cumulative and criterion-referenced evaluation (two-step increments are norm referenced).**

* One incremental step is equivalent to a 2.5 per cent increase in base salary. ** The number of teachers who get a two-step increment is limited to a maximum of the top 15 per cent of teachers in schools.

Implementation challenges

Administrative and management challenges

Thailand has faced various implementation challenges since first implementing its teacher career reforms. Initially, there were issues with teacher evaluations, including weak monitoring of the process and a lack of transparency. Further problems have been reported in the renewal process for teaching licences. The licence can be reissued without rigorous evaluation, as teachers are only required to submit the relevant documentation and nearly everyone receives a new licence with little difficulty. Another issue comes from a discrepancy between the number

of education graduates and recruitment needs. Thailand has faced an oversupply of teachers due to an unrestricted number of places in teacher training institutions. In addition, students with four-year degrees from other disciplines are now allowed to take the examination to become a teacher. For school managers, little prior experience is required in the recruitment process, and this has led to concerns about oversight and teaching quality. Finally, poor working conditions in rural areas have posed difficulties in meeting requirements for progression due to the lack of a supportive environment, including a lack of infrastructure and training.

Financial challenges

The current teacher career structure is known to be very costly to the public. Teacher salaries accounted for 58.9 per cent of the total Ministry of Education budget in 2015. There is frustration that the budget spending for extra professional allowances has been steadily increasing with no sign of improved student learning. Moreover, the budget for teacher development under the Ministry of Education is considered to be ineffectively spent, as most teacher development programmes do not correspond to teacher demands. In addition, many teacher training programmes are conducted during the end of the fiscal cycle (as several ministries rush to use money at the end of the budget cycle), which leads to high numbers of teachers being absent from schools.

Perceived effects

The current teacher career structure (especially the prospect of horizontal progression) and the new payment scheme have contributed to improved teacher motivation and retention. On the other hand, the amount of paperwork related to teacher evaluation and the problematic implementation of the evaluation system, including malpractice and corruption in the process, decrease teacher satisfaction.

As the gap between teachers' salaries and those of other professionals has narrowed significantly over the last decade, it is expected that the new breed of teachers will be of a higher quality. Attractive salaries, welfare benefits, and promotion opportunities are believed to contribute to ensuring high retention rates. Nevertheless, teacher retention is negatively influenced by malpractice in relocation and redeployment processes conducted by the local TEPC.

Conclusion

Thailand has taken positive steps to improve the organization of teacher careers since the 1999 education reform. Detachment of the teaching profession from other civil servant jobs, better pay, and the introduction of the career ladder, along with professional status levels and corresponding allowances, have all enhanced teacher careers in the country. Nevertheless, important weaknesses, such as poor monitoring, lack of transparency, and highly cumbersome evaluation procedures, still need to be addressed, as the country continues its efforts to make the teaching profession more attractive to both potential candidates and current employees.

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About the book

How can governments transform teaching into an attractive career choice for today's youth? Countries all over the world are grappling with this question, as well as with the related challenges of poor working conditions and dwindling retention rates in the profession. In this context, teacher career reforms have the potential to be very powerful. To better understand the models that are being implemented, the related challenges, and their effects, the UNESCO International Institute for Educational Planning (IIEP) investigated the organization and management of teacher careers in Colombia, Ecuador, Ethiopia, Lithuania, Mexico, Peru, Scotland, South Africa, Thailand, and New York City. This publication brings together IIEP's research findings.

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