



Teaching for the Long Haul: Professionalizing Career Pathways for North Carolina Teachers

A Closer Look at Three Advanced Teaching Roles Pilot Districts

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June 2020

Acknowledgements

This report was made possible through the generous support of the Belk Foundation, a private family foundation that invests over \$2 million annually to strengthen public education. The Belk Foundation focuses specifically on K-3 achievement and excellent teachers and leaders, both critical building blocks for successful education. We are incredibly grateful for their extensive support of this work.

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Summary

Understanding the New Landscape of Teacher Leadership

In 2016, the North Carolina General Assembly provided support for school districts across North Carolina to propose and implement pilot advanced teaching roles programs that would allow highly effective classroom teachers to take on leadership roles in their schools and reach more students. Six districts were chosen to develop pilot programs attuned to their local needs.

Purpose of this Closer Look

As an extension of our formal, three-year evaluation of these six pilots, and with the support of the Belk Foundation,¹ the Friday Institute for Educational Innovation at North Carolina State University completed “deep dive” closer-look investigations of three of the six pilot programs—an urban district with past experiences with teacher leadership programs, a rural district new to teacher leadership, and a rural-urban mixed district with some past experience. While the formal evaluation helped to answer several “whether” questions (for example, whether the pilot programs helped improve student outcomes), these deep dives helped to answer “how” and “why” questions about why some aspects of the pilot programs led to improvements in recruitment and retention, stabilization of school culture, and gains in student outcomes, while some aspects did not.

We hope that policymakers, advocates, and practitioners—in particular, practitioners in school districts that are considering implementation of their own advanced teaching roles programs—will find the stories, observations, and learnings provided in this closer look to be helpful as more districts begin to develop their own advanced teaching roles programs.

Lessons from Across the Three Districts

Several observations from our deep dives appeared to be true for all three districts and therefore seem likely to be relevant for any district that is considering development of an advanced teaching roles program.

Overall Strengths

- Earning leadership status is a rigorous and rewarding process for most teachers;
- Program structure can lead to enhanced vertical alignment of curricula;
- Interactions among teachers are more frequent and stronger;
- Lead Teachers help fill gaps even in experienced colleagues’ training and support;
- Early academic outcomes are promising; and
- Teachers value having leadership roles that allow them to stay in the classroom.

Overall Challenges

- Application *rigor* is not the same as application *appropriateness*;
- Initiative success often is personnel-dependent;
- Clear communication matters;
- Implementation success takes time;
- Program expansion may extend cross-district fiscal inequities;

¹ <http://www.belkfoundation.org/>

- Successful Lead Teacher support for beginning teachers is not automatic; and
- Programs introduce new time management challenges.

Overall Lessons Learned

- Lessons Related to Initiative Planning:
 - o Districts—and to some degree, schools—need both flexibility and internal consistency;
 - o Initiatives must include a plan for sustainable funding;
 - o Districts benefit from external design and implementation support; and
 - o Initiatives should be integrated into a district’s larger set of plans.
- Lessons Related to People:
 - o Successful school-level implementation requires collaboration and trust;
 - o Leadership stability is essential;
 - o School-level administrators need training and support;
 - o Teachers need training and support, too; and
 - o Lead teachers are not administrators.

District-Level Lessons

We also include in the main report some strengths, challenges, and lessons learned that appeared to be less universal but that likely still will be relevant for other districts that are thinking about developing their own programs.

Closing Thoughts

Providing opportunities for districts to develop and implement teacher leadership programs appears to be a good move for our state. It is not, however, a move that can be made lightly and with only a short-term vision. We hope that the stories shared in this closer look will help other districts and the state as a whole to build the strong, sustainable, and successful teacher leadership programs that our teachers and their students both need and deserve.

Understanding the New Landscape of Teacher Leadership

The Advanced Teaching Roles Pilot Initiative

Goals for the Pilot Programs

In 2016, the North Carolina General Assembly provided support for school districts across North Carolina to propose and implement pilot local advanced teaching roles programs. Per Section 8.7(a) of the enacting legislation,² the intent of the pilot programs was to (emphases added):

1. Allow highly effective classroom teachers to **reach an increased number of students** by assuming accountability for additional students, by becoming a lead classroom teacher accountable for the student performance of all of the students taught by teachers on that lead classroom teacher’s team, or by leading a larger effort in the school to implement new instructional models to improve school-wide performance;
2. Enable local school administrative units to **provide salary supplements** to classroom teachers in advanced teaching roles. Selection of an advanced teaching role classroom teacher and award of related salary supplements shall be made on the basis of demonstrated effectiveness and additional responsibilities;
3. Enable local school administrative units to **create innovative compensation models** that focus on classroom teacher professional growth and student outcomes; and
4. Utilize local plans to **establish organizational changes related to compensation** in order to sustain evidenced-based teaching practices that **have the capacity to be replicated** throughout the State.

Participating School Districts

The original legislation supported implementation of three-year pilots, to begin with the 2017-18 school year and conclude with the 2019-20 school year. In 2018, legislation expanded the pilot period to eight years and provided funding to support the addition of more pilot school districts. For the first round of implementation, the North Carolina Department of Public Instruction (NCDPI) selected proposals from six districts: Chapel Hill-Carrboro City Schools, Charlotte-Mecklenburg Schools, Edgecombe County Schools, Pitt County Schools, Vance County Schools, and Washington County Schools. After the expansion in 2018, NCDPI selected four more proposals for the 2019-20 school year from Bertie County, Halifax County, Hertford County, and Lexington City Schools.³

Purpose of this Closer Look

In addition to providing support for the pilots, the General Assembly also required an evaluation of those pilots, with a focus on the **Academic and Instructional Impact** of the pilots, as well as on their **Impact on the Teaching Profession**. The North Carolina State Board of Education requested two additional evaluation components: a **Comparative Analysis of Programs** and **Financial and Policy Considerations**.

North Carolina State University’s Friday Institute for Educational Innovation⁴ conducted the three-year evaluation. For the General Assembly and the State Board of Education, the evaluation team focused primarily on “*whether*” questions about the pilots—for example, whether the presence of the initiatives has led to

² North Carolina General Assembly Session Law 2016-94, Section 8.7 (<https://www.ncleg.gov/sessions/2015/bills/house/html/h1030v8.html>)

³ Twelve districts submitted proposals for 2017-18; 13 more districts applied for 2018-19. Proposals from both rounds can be found here: <http://www.ncpublicschools.org/district-humanresources/>.

⁴ <https://www.fi.ncsu.edu/>

measurably better student outcomes, relative to outcomes in similar schools without an advanced teaching roles option. The team also began to answer “how” and “why” questions as part of this evaluation—for example, how the initiatives were being implemented, and why certain aspects of the initiatives appeared to work better than others—but only to a limited extent.

With the support of the Belk Foundation,⁵ the evaluation team was able to commit additional resources to these “how” and “why” questions via extended site visits, additional surveys, and an expanded slate of focus groups in three of the six original pilot districts. The result of this additional work is a deeper qualitative investigation of the implementation in these three districts—one in an urban setting with a long history of advanced roles initiatives (Charlotte-Mecklenburg Schools), one in a rural setting with no history of advanced roles initiatives (Edgecombe County Public Schools), and one in a rural-urban mixed setting with experience from one previous initiative (Pitt County Schools). These “deep dives” provide a richer portrait of the reasons why some aspects of the pilot programs led to improvements in recruitment and retention, stabilization of school culture, and gains in student outcomes, as well as why some aspects did not have the anticipated effects. As one participating teacher put it:

[All districts can benefit from seeing] what everybody’s doing already, what’s in place and take from that. Because obviously the model’s good. There are people doing it well, [elected officials] want to put money into this, so I think it’s [important for districts] to be really intentional about what exactly [they will do.] What is going to be the [best] path for our teachers to integrate this with authenticity and passion and be willing to put the time into it? I think [district-level initiatives] need to be looked over throughout the state, whoever’s implementing it, because there’s going to be positives and challenges for every district.

We hope that policymakers, advocates, and practitioners—in particular, practitioners in school districts that are considering implementation of their own advanced teaching roles programs—will find the stories, observations, and learnings provided in this closer look to be helpful as more districts begin to develop their own advanced teaching roles programs.

⁵ <http://www.belkfoundation.org/>

How the Closer Look was Developed

The information in this document was compiled from several different data sources, including focus groups, surveys, and district-level logic models (explained below) developed in partnership with district staff. For additional information about the data collected and about how we used the data for the analyses included in our annual state reports, readers are encouraged to review our formal state evaluation reports, which are submitted to the North Carolina State Board of Education annually.⁶ These reports also include our team's early efforts to estimate the impact of the pilots on student and teacher outcomes (such as changes in student test scores and teacher quality).

Surveys

We administered online surveys to advanced roles teachers, other educators directly impacted by those teachers, school and district administrators, and students every spring between 2018 and 2020. The survey collected information on program impact related to teacher growth, recruitment, retention, and job attractiveness. Student surveys focused primarily on perceived changes in teacher's instruction and attitude in the classroom.

Each school year, about 65 teacher leaders, about 150 of their colleagues, and about 25 administrators across the three districts responded to surveys. In addition, about 500 and 1,000 students responded to surveys in 2018 and 2019, respectively.⁷

Interviews and Focus Groups

Every fall and spring, we also conducted between 15 and 20 focus groups with students, teachers, and school and district administrators across all three case study districts, with more than 100 total participants each time.⁸ We reviewed transcripts of each focus group session for overall or district-specific evidence of year-to-year initiative stability, successes, challenges, and lessons learned.

Logic Models

In Year 1, the evaluation team wrote narrative descriptions of each pilot plan (based on each district's application and our initial observations in those districts), vetted those descriptions with district leadership, and also developed logic models with district leadership that help to illustrate how those leaders envisioned their plans working. A logic model is a graphic representation of the ways in which initiative leaders envision their initiatives working. These narratives and logic models were updated every year to reflect programmatic changes. The final versions of the narrative overviews are included in the next section; the final versions of the logic models are included in the [Appendix](#).

⁶ *Teacher Compensation Models and Advanced Teaching Roles Pilot Programs: Year 1 (2017-18) Preliminary Report* (<https://simbli.eboardsolutions.com/Meetings/Attachment.aspx?S=10399&AID=135365&MID=4360>; submitted May 2018); *Teacher Compensation Models and Advanced Teaching Roles Pilot Programs: Year 1 (2017-18) Interim Report* (<https://simbli.eboardsolutions.com/Meetings/Attachment.aspx?S=10399&AID=144612&MID=4725>; submitted October 2018); *Teacher Compensation Models and Advanced Teaching Roles Pilot Programs: Year 2 (2018-19) Interim Report* (<https://simbli.eboardsolutions.com/Meetings/Attachment.aspx?S=10399&AID=189959&MID=5817>; submitted October 2019); *Teacher Compensation Models and Advanced Teaching Roles Pilot Programs: Year 3 (2019-20) Final Report* (<address to be added once posted>; submitted June 2020)

⁷ The unprecedented series of school closures in Spring 2020 as a result of the coronavirus outbreak curtailed some educator and all student survey administrations; as a result, educator response rates were lower than usual, and we were not able to collect any student responses for Year 3 of the initiative.

⁸ Again, as a result of the Spring 2020 coronavirus outbreak, focus group totals for educators were lower than usual in Year 3, and we were not able to conduct any with students before schools were closed.

What Advanced Teaching Looks Like: Stories from Three Different School Districts

Any educator will tell you that, when it comes to designing and successfully implementing a new school program, one size definitely does not fit all. This caution is especially important to keep in mind in a state like North Carolina, where so many school decisions are made at the state level, sometimes without regard for whether or to what degree they should apply to individual schools in different settings.

A significant strength of the Advanced Teaching Roles pilot program guidelines is the flexibility they give districts to design their own program (within certain limitations). Not only is this flexibility helpful for districts that need to develop custom-fit programs, but it also helps us to better determine whether what we learn about advanced roles programs is likely to be true for any district, regardless of that district's approach to supporting advanced teaching roles, or only for a handful of districts in specific contexts or with specific program elements.

This section describes the programs in each of our three focus districts in greater detail and also provides additional details about the districts themselves. As you will see, while all three programs have a lot in common, each has its own unique features, and all operate in very different settings.⁹

An Urban District with a History of Teacher Leadership Programs: Charlotte-Mecklenburg

District Context

Charlotte-Mecklenburg Schools (CMS) is a very large, predominantly urban district in Southwest North Carolina that has had a long history of supporting teacher career ladder and teacher incentive programs. With over 150,000 students, it is the second-largest district in the state, and also among the top twenty in size nationwide. CMS's current teacher leadership initiative (the one highlighted in this report) is built on the shoulders of several other initiatives that preceded it, including a Race to the Top-era (2010-2014) Strategic Staffing Initiative (SSI), Project Leadership and Investment for Transformation (Project L.I.F.T, originally supported by a federal Teaching Incentive Fund grant and structured on the Opportunity Culture¹⁰ model), and, most recently, Success by Design (SbD). Many of CMS's programs have included principal leadership elements as well. Most of CMS's models have incorporated teacher (and sometimes principal) movement to higher-need schools.

Current Advanced Teaching Opportunities in Charlotte-Mecklenburg

Overview. In July 2019, CMS's Success by Design (SbD) advanced teaching roles program was re-imagined as the Teacher Leader Pathways (TLP) advanced teaching roles program, the foundational component of CMS's new Department of Teacher Leadership. The program has three goals: to improve recruitment and retention of effective teachers; to bolster student achievement; and to elevate the overall culture of participating schools. The original program, SbD, was established as part of Project LIFT, which incorporated Public Impact's Opportunity Culture¹¹ model for supporting advanced teaching roles (for example, TLP's compensation scale and teacher-leader job descriptions are based on the Opportunity Culture framework). TLP's structure also is informed by a recent district professional development needs assessment.

⁹ The logic models that provide graphic representations of each of these program descriptions are in the [Appendix](#).

¹⁰ Public Impact's Opportunity Culture model (<https://www.opportunityculture.org/>) incorporates class size flexibility, fund reallocation, and a variety of teacher leadership and support roles to reshape staffing and compensation within a school, with an emphasis on differentiating teacher roles and responsibilities and matching compensation to those roles and responsibilities.

¹¹ <http://opportunityculture.org/opportunity-culture/>

The first schools in TLP's predecessor, the SbD program, started their "Design Year" (planning year) during the 2013-14 school year, and the number of participating schools has increased each year. At the start of the 2019-20 school year, 56 schools and over 300 teachers were participating in the TLP program.

Though they share a history with previous CMS advanced teaching roles efforts, SbD and TLP introduced several modified or new elements, including their own teacher recruitment and talent pool screening process, communication strategy, process for re-qualifying teacher leaders, differentiated professional development activities (along with a dedicated Program Specialist), financial sustainability plan, and program evaluation process.

Advanced Roles and Other Program Features. The heart of the TLP program is the wide array of advanced teaching roles nested within two broad categories:

- **Multi-Classroom Leaders** are initially responsible for coaching two to three teachers, with an expanded responsibility of up to seven teachers as they advance in that role.
- **Expanded Impact Teachers**¹² are full-time classroom teachers who take on increasingly challenging school leadership responsibilities as they advance through three levels of service. Each participating school sets the specific roles it needs its Expanded Impact Teachers to play, and roles can change from year to year.

Teachers selected for advanced roles follow a Professional Development Pathway— differentiated professional development activities provided by a newly-hired professional development specialist and other TLP and CMS staff—that includes courses and workshops designed to build skills specific to leading other adults. Additional support for TLP schools is provided by **Instructional Associates**¹³ who can pull small groups of students, support swaps for time and technology, and assist in classrooms with larger student numbers. Currently, teacher-leaders must re-qualify for the program every two years through a shortened application process and rubric-based assessment; however, DTL is modifying this process due to recent changes to state testing requirements, feedback from various stakeholders, and data collected from previous years.

Design Process. Most schools are recruited to TLP through internal newsletters, webinars, and word of mouth. After successful completion of a readiness application and a review of the TLP school-specific design process with district staff, the school shares program details with school personnel.¹⁴ Next, the TLP Program Manager meets with school staff and conducts three sessions on the program. At this point, teacher recruitment begins and the participating school identifies staff members who are interested in applying for the advanced teaching positions. Interested teachers go through a district-wide talent pool assessment process, during which teachers' applications are assessed using a district-designed rubric.

Expected Outcomes. Short-term expected outcomes for the grant include improvements in school culture as measured by the The New Teacher Project Insight survey, which measures school culture, and by student surveys of their perceptions and experiences. In addition, program developers expect to see professional growth (as measured by EVAAS and teacher evaluations) at the school level, as well as growth in the number of teachers who take on advanced roles. Longer-term expected outcomes include student growth (as measured by EVAAS) and specific evidence of growth among teachers supported by the advanced teachers (as measured by EVAAS and teacher evaluations). Ultimately, CMS hopes to see TLP schools outperform district and state results on student achievement, school culture, and teacher retention and effectiveness.

¹² Originally referred to as **Reach Teachers** under SbD

¹³ Instructional Associate positions are paraprofessional positions.

¹⁴ In some cases, TLP-trained principals who move to non-TLP schools or who are opening new schools can convert those schools to TLP without going through the entire application process.

Table 1. CMS Supplemental Pay Table

Position Title	Salary Differential ¹⁵
Multi-Classroom Leader 2	\$13,750-\$18,250
Multi-Classroom Leader 1	\$11,250-\$16,000
Expanded Impact Teacher 3	\$6,750-\$9,000
Expanded Impact Teacher 2	\$4,500
Expanded Impact Teacher 1	\$2,250
Instructional Associate	* 16

A Rural District New to Formal Teacher Leadership Programs: Edgecombe

District Context

Edgecombe County Public Schools (ECPS) is a mid-size, rural district in Eastern North Carolina with only a limited history of experiences with teacher leadership initiatives. With a little less than 6,000 students, ECPS is the median district size in North Carolina, but its student population has been declining steadily for the past 15 years, dropping from more than 7,700 students in 2005. Other than school-level plans at federally-supported School Improvement Grant schools, Edgecombe had not implemented a fully-fledged teacher leadership program before beginning its current pilot.

Advanced Teaching Opportunities in Edgecombe

Overview. The purpose of ECPS’s advanced teaching roles program—called Innovation Grounded in Research, Results, and ECPS Strategic Priorities—is to extend the reach of excellent teachers beyond their own classrooms. Leadership roles allow core subject teachers to impact instruction across multiple classrooms in their schools, with a goal of improving schoolwide student academic growth. In partnership with Public Impact, ECPS is implementing an Opportunity Culture¹⁷ framework to help teacher leader reach more students while also providing additional time for planning, collaboration, and professional development.

Advanced Roles and Other Program Features. In keeping with the Opportunity Culture model, ECPS created two advanced teaching roles and one supporting role:

- Expanded Impact Teacher (EIT): There are two types of EITs. The first type takes on larger class sizes, which, in addition to freeing up time for teachers in other advanced roles, also helps address challenges related to teacher recruitment in rural districts. The second type takes on significant additional leadership responsibilities, such as planning and leading all interventions and Professional Learning Communities.
- Multi-Classroom Leader (MCL): MCLs engage in teacher capacity development, provide direct instruction to other teachers, and participate in team management.
- Reach Associate (RA): RAs provide supplemental instruction in EIT classrooms in a teaching assistant role, which helps ensure that more students are taught by effective teachers.

¹⁵ Supplements are tiered and have a range based on the participating school’s Title I status.

¹⁶ The Instructional Associate position is a 10-month paraprofessional position and is compensated based on a standard CMS Pay Grade 02 scale.

¹⁷ <http://opportunityculture.org/opportunity-culture/>

Teacher training is provided by ECPS in conjunction with several third-party partners:

- ECPS provides education leadership training developed by New Leaders for New Schools¹⁸ to all MCLs
- Public Impact provides professional development modules on various topics
- The Hill Center¹⁹ provides training and certification in literacy interventions for teachers interested in becoming literacy MCLs
- The Buck Institute²⁰ provides training in problem-based learning
- The Racial Equity Institute²¹ (REI) provides training on racial equity
- CT3²² provides No-Nonsense Nurturer training in support of developing a stronger student culture

Design Process. During the planning phase for their advanced teaching roles program, ECPS defined selection criteria for the new teaching roles, established district and school design teams, developed a community outreach plan, and outlined a multi-year roll-out plan. The roll-out plan is based on high school feeder patterns, with all schools along a feeder pattern brought in at the same time. ECPS has three high schools; the third feeder pattern will be brought in to the program after the 2018-19 school year.

Next, teachers were selected for the new roles based on a variety of teacher quality indicators, including student growth, demonstrated teaching mastery, and teacher evaluations at or above the Accomplished level. These teachers also completed behavioral interviews and provided evidence of meeting critical competencies for each advanced role. In partnership with Public Impact, the design team also constructed an evaluation and program refinement plan.

Finally, the district design teams and district innovation lead designed a financial model that would allow the district to sustain the advanced teacher supplements and class restructuring beyond the pilot timeline by expanding the ways in which the district uses its Title I funds. In addition, because the first three schools implementing Opportunity Culture have been designated as “restart” schools²³, the district has even more financial flexibility.

Expected Outcomes. District leaders have identified an increase in the pool of advanced teachers, expansion of the proportion of students who are taught by excellent (EIT and MCL) teachers, improvements in student expected growth, and an increase in teacher retention rates as desired outcomes of the program. The district anticipates that, once the program is fully established, there could be up to three times as many advanced teacher applicants as positions. Currently, the program has filled 11 positions in three schools, and district leaders are targeting 45 to 50 positions available across 13 schools some time over the next three years.

¹⁸ <http://newleaders.org/>

¹⁹ <https://www.hillcenter.org/>

²⁰ <https://www.bie.org/>

²¹ <https://www.racialequityinstitute.com/>

²² <http://www.ct3education.com/>

²³ Restart schools are part of a school improvement model in which persistently low-performing schools apply for charter school-like flexibility that allows them to enact a localized plan to increase student achievement. Examples of these flexibilities: length of the school day, use of state funds, and teacher licensure. Restart schools remain under the supervision of the local school board.

Table 2. ECPS Supplemental Pay Table

Position Title	Salary Differential
Multi-Classroom Leader I	10-15% of salary
Multi-Classroom Leader II	20-30% of salary
Expanded Impact Teacher I	10-15% of salary
Expanded Impact Teacher II	20-30% of salary

A Rural-Urban Mixed District with Some Teacher Leadership Experience: Pitt

District Context

Pitt County Schools (PCS) is the largest district in Northeast North Carolina, and, at 24,000 students, among the top 15 by size statewide. Unlike most of the other districts in its region, PCS has maintained its size over time, growing slowly since 2005 (when it enrolled about 22,000 students). PCS’s different trajectory may be attributed in part to the fact that the county hosts one of the largest state university campuses in North Carolina (East Carolina University). PCS has implemented teacher leadership programs before, the most notable being the Race to the Top-era Teacher Leadership Cohort (TLC) program, which ran from 2010-11 through 2013-14.

Advanced Teaching Opportunities in Pitt

Overview. The goal of PCS’s current teacher leadership program, the Recruit-Retain-Reward (R3) Framework, is to increase the number of high-performing schools across the district by improving the recruitment of high-quality teachers and the long-term retention of highly-effective teachers and teacher leaders. The primary method for accomplishing this goal is the introduction of several Career Pathways for classroom teachers. PCS has committed multiple internal resources to the pilot, including central service administrators (the R3 Leadership Team), 12 district-level trainers/coaches from PCS’s Division of Educator Effectiveness and Leadership²⁴ (DEEL), and 39 school instructional coaches. In addition, the program is supported by related initiatives, such as the district’s Teacher Leadership Institute and Key Beginning Teacher Program (sponsored by the Pitt County Educational Foundation).

Advanced Roles and Other Program Features. A Career Pathway teacher fills one of two roles in a school:

- **Facilitating Teachers (FTs)** teach their own classes while facilitating the involvement of other collaborative teachers (CTs) in a Collaborative Inquiry Project. The initiative’s goal is to have three CTs for every FT. This team of four identifies and works on resolving a problem of practice (detailed below).
- **Multi-Classroom Teachers (MCTs)** co-teach with two or three other teachers who are either under-performing or inexperienced. This co-teaching includes classroom instruction, co-planning, and collaborative student assessment. MCTs also address specific personnel needs.²⁵

Principals hire eligible Career Pathway candidates based on a districtwide application process. Career Pathways teachers can be identified within the district or as part of the hiring process for teachers new to the district.

²⁴ <https://successforeverychild.com/>

²⁵ In 2017-18, PCS identified 54 FTs (target: 66 FTs) and 177 CTs (target: 198); for 2018-19, the goal is to identify 96 FTs, 288 CTs, and 18 MCTs.

Each participating school localizes its implementation of the program to meet its needs. First, the school leadership team identifies a problem of practice to be addressed by its FTs. Once a Collaborative Inquiry topic is identified, FTs research the topic, implement appropriate interventions in their classrooms, share their results, and make instructional adjustments based on those results.

Career Pathways teachers are provided ongoing coaching by DEEL coaches and are trained in DEEL-identified Core Professional Learning areas. Topics include data-driven dialogue training, co-teaching and co-planning training (in partnership with East Carolina University), Cognitive CoachingSM,²⁶ and Adaptive School Training.²⁷ In addition, PCS provides pre-training for up to 25 future Career Pathway teachers annually through the Teacher Leadership Institute.

R3 includes support for performance-based incentives based on individual EVAAS ratings, North Carolina Educator Evaluation System (NCEES) ratings, and other criteria. All full-time classroom teachers are eligible to apply for an advanced role position. In addition, some teachers are eligible to receive an annual, one-time bonus based in part on student performance scores as measured by EVAAS. Teachers who meet all criteria, including either: being rated in the top 25% of the state or district on a standardized test in mathematics or reading; or who receive a “blue” EVAAS rating in other subjects, will receive a one-time bonus from either the state or district, with the state given first priority. These teachers also are eligible to apply for the Growth Teacher (GT) role. GTs mentor other teachers who did not receive the bonus with the aim of helping them improve their practice so that they can receive the bonus and meet other criteria for being identified as “highly effective.”

In addition, administrators are eligible to receive either a state or local bonus for serving at Blue Schools, as decided by the Principal Advisory Council, with the state bonus given first priority.

Design Process. In order to support the program’s size, PCS secured funding from several sources in addition to the state-provided pilot funding. Key financial support is provided by a federal TIF grant, and PCS also partners with multiple non-public partners, including the Wells-Fargo Foundation, The Eddie and Jo Allison Smith Family Foundation, the Pitt County Education Foundation, and the Z. Smith Reynolds Foundation.

Expected Outcomes. A key anticipated early outcome is that Career Pathways teachers will show increased leadership skills and capacity as measured by annual growth on the NCEES and on a district-developed teacher leadership rubric. PCS also expects to see evidence of an increased sense of professional rapport and community in schools, along with higher retention rates of highly-effective teachers and increases in the number of those teachers who work in the district’s highest-need schools; as a result, overall teacher turnover should decrease. Finally, PCS hopes to see an increase in the size of the candidate pool for the Career Pathways program. As the number of Career Pathways teachers grows and as Career Pathways teachers identify, research, and address problems of practice, the district expects to make progress toward the ultimate longer-term goal of increasing gains in student achievement.

²⁶ <http://www.thinkingcollaborative.com/seminars/cognitive-coaching-seminars/>

²⁷ <http://www.thinkingcollaborative.com/seminars/adaptive-schools-seminars/>

Table 3. PCS Supplemental Pay Table

Position Title	Salary Differential
Facilitating Teachers*	15% of salary
Multi-Classroom Teachers	30% of salary

Other Supplements	Salary Differential
Collaborating Teacher	\$2,000
Tchr. Ldrshp. Inst. Completion	\$4,800 (paid over 2 yrs)
Blue Teachers (+2 EVAAS)	\$2,500
Growth Teachers	\$500/teacher (max \$1,000)
Principals at Blue Schools**	\$5,000
Asst. Princs. at Blue Schools	\$3,500

* After the pilot grant ends, PCS plans to change the FT supplement to a fixed amount (amount to be determined).

** Principals who receive state bonus pay for school performance are not eligible to receive local bonus pay.

Lessons from Across the Three Districts

The next two sections include three sets of observations: perceived strengths of advanced teaching roles programs, challenges associated with implementing these programs, and lessons learned.

In this section, we share observations that appear to apply across multiple districts. While we do not suggest that these observations will apply to every district that develops an advanced roles program, their commonality across three very different district settings does suggest that they are likely to apply in most situations.

In the section that follows, we share observations that appear to be less universal but that likely still are relevant for other districts that are thinking about developing their own programs.

Overall Strengths

Earning Leadership Status is a Rigorous and Rewarding Process

Lead teachers²⁸ and administrators across the three districts praised the rigorous nature of the application processes their districts used for selecting teachers for advanced roles, noting that the rigor contributed to the honor they attached to the lead positions:²⁹

I think the way our district approached the hiring process was really strategic and smart. It just set a really high bar so not just anybody can become a multi-classroom leader. . . . You have to have exceeded growth [as measured by the state's value-added calculations], . . . you have to have certain ratings on your previous observations, you have to have shown the results to get the position. I think that really matters a lot. . . . What's been cool about it is that we've been able to identify the stronger people in our district and . . . say to them, "You should consider this," and so, now, if you look across our district, it's pretty cool. All these teachers I've been hearing about for years, about how great they are, are now in these roles, because they deserve it. (Administrator)

The process of becoming a lead teacher does not end with a successful application; it continues as the teachers grow into their new roles. As they do so, and as they start to connect with other lead teachers, many of these teachers appear to develop a new or expanded teaching identity that is in itself rewarding for them. Across several focus groups, we heard these teachers explain not only that they felt good about being recognized as teachers who were ready for greater challenges, but also that they had started to discover through their work in other classrooms that their effort, strategies, and skills perhaps really did set them apart in some ways. Their descriptions of this realization did not come across as boastful; rather, it often felt more mission-driven, as if they had found a new purpose for being a teacher above and beyond what had brought them to the classroom in the first place:

When I was a classroom teacher, I only saw my classroom and the way I did things. And I just thought everyone did that the way that I did it. And [now,] seeing nine different classrooms, I saw a lot of things . . . not to do, and things to do. And [now I'm] able to share that with other classrooms, like, "This was really great, let's check that out." So, it's been really eye-opening for me. . . . (Lead Teacher)

²⁸ Each district has different names for teachers in lead positions, as well as for the teachers they lead (explained in greater detail in the preceding section). With the exception of a few specific instances (for instance, in direct quotes), we refer generically to teachers in any advanced role as **lead teachers**, and to the teachers with whom they work most closely as **teacher colleagues**.

²⁹ A rigorous application process is not always the same as an *appropriate* application process, however; we discuss in a later entry some of the common, cross-district challenges associated with the lead teacher application process.

There also is some evidence that teachers find reward in the journey to becoming eligible to be a lead teacher—even without a direct financial reward. For many would-be lead teachers, becoming a teacher leader involves more than a single-step application for a lead role; it also requires first gaining experience in one of the many support roles or pipeline programs designed to provide lead teachers with the time they need to carry out their responsibilities. These roles do not always come with a significant boost in pay (if any at all), so the immediate incentive to pursue one is more about recognition and the intrinsic value of growing professionally in a way that could lead to greater recognition and responsibility down the road. While the possibility of later financial reward might be a part of the appeal of the leadership pathway, many of these teachers and other teachers not yet in lead roles shared that the immediate value of the program to them was simply in having the chance to advance their careers in more ways than just accruing years of teaching experience.

[My lead teacher's] support this year around leadership has helped me realize the potential that I have there. And that's pushing me, like I know in my next phase I want to have a stronger leadership presence. (Teacher Colleague)

Program Structure Can Support and Enhance Vertical Alignment of Curricula

Lead teachers, their teacher colleagues, and administrators across districts often commented on how the presence of advanced teaching roles has encouraged teachers to work more collaboratively across grade levels. For non-educators, it may come as a surprise to hear that such work relationships are novel in some schools, but, for the most part, teacher teams (especially in elementary schools) typically consist of same-grade teachers, affording little opportunity for cross-grade sharing and planning. In our focus districts, several schools had advanced role teacher-led teams that crossed grades, which fostered opportunities for robust cross-grade curriculum alignment (often called “vertical alignment”) throughout those schools, and in one case, even across the district:

[B]eing able to see sixth, seventh and eighth grade has [done] a lot [for us] in terms of . . . vertical alignment for math. . . . I actually was in the room last year when [my teacher colleagues] taught it . . . so now I know how to build off of [what they did] better. And then, of course, teaching seventh and eighth now, I'm like, “Oh yeah, I've got that.” So it has been helpful . . . to really understand the standards and why they are structured the way they are and how very subtly different they are from grade to grade, but then also seeing other people actually teach and being like, “Huh, I never thought of doing it like that” has helped content a lot. (Lead Teacher)

Every month, we [lead teachers] were meeting as a district, and so we were able to have a lot of discussions and do a lot of common planning. . . . [Lead teachers in another school] are implementing the same things we are implementing. The language is the same. The kids are getting the same feel as they move through [the curriculum]. So we've actually begun to develop some continuity across K-12. (Lead Teacher)

Interactions among Teachers are More Frequent and Stronger

Teachers and administrators across all three districts consistently noted differences in the level of interaction possible between lead teachers and their colleagues (especially their beginning teacher colleagues), relative to the interaction possible between (for instance) teachers in a traditional mentor role and their mentored colleagues. Every beginning teacher in North Carolina is paired with a mentor teacher, but the strength and

quality of that relationship varies considerably across the state, from mentor relationships nearly as strong as those in an advanced teaching roles program to arrangements that are relationships in name only. In most cases, mentoring ultimately suffers from the fact that there often is no dedicated time for either the mentor teacher or the teacher being mentored to engage in the relationship; in an advanced teaching roles program, the ability to develop that relationship often is interwoven into the program's structure.

The mentor I worked with in [another district] was a lovely [person], but there was no instructional support. I didn't feel like I had a coach, somebody that could help me work through things and give me advice on my content and my teaching. My [ATR lead teacher] is like a bucket of resources. . . . [S]he focuses on the content. . . . (Teacher Colleague)

In many counties, the beginning teacher has a mentor that's in their school, but they [only] get to meet after school, or they get to meet at planning [period] and just discuss, "This is my challenge, and this is what I think I need." But that mentor isn't able to go into the room and help that teacher [in the moment]. By having the [lead teacher] role, I am able to be in a classroom more frequently [and] find small actions for that teacher and give them [those] weekly one-on-one small action steps to help grow them with what they need in that moment. . . . The other way that the [lead teacher role] has helped support is that . . . we give a lot of . . . curriculum support. . . . You can have collaborative meetings more frequently, ensuring that teacher . . . has the support that they need to teach a curriculum [and] that they understand the standards that they should be teaching students. . . . Also, I think just in general, it makes that beginning teacher feel more comfortable. A lot of times when I was in the administrator role, you know, you go in . . . classroom[s] three official times in the year. . . . But when you have 30 other teachers that you're having to observe, the reality [is] that those walkthroughs are [not] happening frequently. . . . So, through these advanced roles positions, administrators can rely on folks in those advanced roles to give that extra support. . . . (Lead Teacher)

Lead Teachers Help Fill Gaps in Experienced Colleagues' Training and Support

Though we often think of teaching as a lifelong profession in which one becomes better over time, most teacher training trajectories include intensive, up-front support before a teacher enters the classroom, followed by sporadic and unaligned mentorships and on-the-job training opportunities (via Professional Learning Communities and professional development) after the teacher enters the classroom. In some districts, the transition can be relatively smooth and the support substantial, but in many districts—especially smaller schools in which teachers have to play many different roles and as a result have less time to support colleagues, or districts with resource challenges—the change in the level of support can be jarring.

In response, school districts, universities, and many third-party organizations have developed bridge programs (such as the statewide teacher mentor role, described above, or programs like the New Teacher Support Program³⁰), but for the most part these programs target beginning teachers. The standard focus on beginning teachers, while important, overlooks the fact that teachers develop at different rates, and that experience alone is not always the best guide for how much support a teacher still needs or can benefit from.

³⁰ <https://ncntsp.ecu.edu/>

Advanced teaching roles programs take experience level out of the equation, placing the emphasis on leadership based on demonstrated teaching ability, regardless of experience level. Though not always easy for veteran teachers to embrace at first (see a related entry in the **Challenges** section, below), by the third year of the pilot programs many of the more experienced teachers to whom we talked who were on teams with designated teacher leaders had come to appreciate the value of the teacher leader role and the ways in which having a teacher leader partner helped them enhance their own teaching, years after they thought they had peaked.

In the beginning, I never thought I'd be able to teach literacy. I always thought I was strictly a math person. (Teacher Colleague)

[W]hat I'm focusing [on now is] how authentic my teaching is. (Teacher Colleague)

In our three focus districts, a good specific example of the type of veteran teacher growth made stronger by the presence of advanced roles was related to use of student data. Many veterans, both leads and their colleagues, commented that, when formal leadership duties included leading teams in the analysis of their students' data, the program made them more comfortable doing so and planning data-driven instruction:

[By analyzing our students' data together, w]e were able to figure out what our strengths were as far as what type of student we're really good at teaching. . . . For example, I found out that I'm really good at working with . . . higher[-ability] students and pushing them, whereas [a colleague] is better at working with the [English Language Learner] students and helping support and bridge that gap for them. (Teacher Colleague)

Early Academic Outcomes are Promising

Educators at all levels and across all districts agree that there are early signs of academic success related to the presence of the initiative—and not just in terms of student test scores. They also note changes in their students' approaches to schooling and learning.

This program has been beneficial for our students. I know the first year of implementation we exceeded growth in four out of six subject areas. Last year we met and exceeded growth in subject areas, so you see that students are growing academically. I think more importantly[, though,] having a coach in the classroom and having teachers have a common language has really [improved] the [academic] culture that students are experiencing. . . . The culture and the lived experience for students—I can see a drastic difference. I can see that they feel valued and they feel loved here. . . . [W]hen I got here, they were throwing backpacks across rooms and screaming at teachers. They were lashing out. . . . [T]hey didn't understand school, and now they're invested in school and feeling a purpose in school. (Lead Teacher)

Our school went up a whole grade. And I know that it's because of the [teacher leader] support in the lower grades. I mean, the teachers are great, too, but, having that support [makes the difference]. (Teacher Colleague)

Readers are encouraged to review our annual state evaluation reports³¹ for additional insights into the emerging indicators of academic success related to the presence of advanced teaching roles positions, including promising, if still tentative, outcomes from early analyses of student test data.

³¹ [Links to these documents can be found on p. 5.](#)

Teachers Value having Leadership Roles that Allow Them to Stay in the Classroom

Finally, current and aspiring teacher leaders across the districts mentioned how happy they were to have an opportunity to grow their formal leadership responsibilities and skills without having to move over to an administration track to do so.

[T]his role . . . allowed me to grow as a professional without becoming an administrator, which was something that I probably would have been terrible at and maybe was not ready for. So this role has allowed me to work in curriculum and work with students, which is what I love to do. But it didn't cost me my time and [additional] education [to do so]. . . . (Lead Teacher)

Veteran teachers also shared that the advanced roles addressed their desires to seek new challenges later in their careers, again without having to stop working directly with students.

I was getting really burned out and it afforded me the opportunity to leave the classroom but still stay within the school setting and work with students and grow as an educator even further, without having to go back to college at the end of my career and get a degree in curriculum instruction, or pursue something that was actually going to cost me more money out of my pocket. Instead I was able to move into this advanced role and continue to flourish as an educator and [share] what I had learned over 25 years [with] other teachers that I work with and do so with the bonus of making a lot more money in the process. (Lead Teacher)

Some administrators acknowledged that they would have opted for an advanced role career path instead of administration, had one been available, and, not insignificantly, at least two administrators in two different districts even left that path to return to the classroom as teacher leaders:

I'm hoping we can continue what I'm doing [leading from the classroom rather than from the front office], and I'll be honest: I would 99% continue doing it, even without the compensation. (Lead Teacher)

Overall Challenges

Application Rigor is not the Same as Application Appropriateness

Nearly all of the teachers and administrators in our three districts agreed that the application processes used in their districts to identify their lead teachers were appropriately rigorous. They were less convinced, however, that the application processes aligned well with the actual roles lead teachers are asked to play.

The first and perhaps most important alignment challenge has to do with the difference between the data and evaluations typically available for teachers (which for the most part reflect their ability to lead *students*) and the data and evaluation information necessary to determine whether these teachers are prepared to lead other teachers. On-paper credentials are one thing, but as several teachers noted, the ultimate success of the leadership role is the leader's potential to make meaningful human connections with colleagues—a skill that does not necessarily emerge during a traditional application process.

I've [got] many teachers [who] are really great at leading kids, but when it's time to lead adults, that in itself can be a little bit more intense. . . . [K]ids . . . can be open to ideas. . . . [T]hey're still fluid, they're still changing [and are] a little bit more malleable. Our adult mindsets . . . sometimes can be a little more fixed, and kind of hard to penetrate. So [it can be] really hard [for teacher leaders] to get . . . adults to move beyond what they already know. . . . You have to be careful making sure you're building team relationships and improving team dynamics. (Administrator)

[I]t's great if you can work with kids, but can you work with adults? (Administrator)

The second alignment challenge stems from an imbalance between readily-available quantitative information about candidates (for example, EVAAS ratings) and harder-to-collect (and, in some cases, define) qualitative information (such as demonstrated leadership potential).

[Teacher selection is] very much based on one data point: EVAAS. And, you know, EVAAS is certainly an important indicator of student achievement and of teacher talent and teacher ability, student ability, but I think that it's also [only] one data point. We talk about the importance of triangulating data, and I worry that we're sending that message to teachers and principals about how to look at multiple data points to come to conclusions and to plan for intervention, but we're not sending that message at the district level when we hire people based on one data point into a position that is, frankly, very important and that has a lot tied to it. (Administrator)

For example, in districts in which teachers who are given a lead role may have to move to a new school to take on that role, it can be challenging for application reviewers or school administrators to get a good sense for how well a teacher's softer skills might transfer well to a new school setting. As one administrator put it, there is a difference between the "hard stuff" in an application that is easy to review and understand (for example, testing results) and the "soft stuff" that does not necessarily come out through an application process (for example, things like emotional intelligence and coachability):

[D]ifferent schools, even in our district, look for different [kinds of] candidates. For some of the schools, the hard stuff is all that matters. For us, [what matters is the] soft stuff. (Administrator)

Several teachers agreed that leadership and pedagogical success can be context-dependent and do not necessarily transfer when a teacher changes school sites.

A third related challenge was their concern that a too-rigorous application process might discourage otherwise-qualified teachers from applying—a challenge not dissimilar to some of the issues raised about the rigor of the National Board of Professional Teaching Standards certification process. To combat this challenge, at least one of the three districts offers open houses to de-mystify the application process and actively initiates personal conversations about the roles.

Initiative Success Often is Personnel-Dependent

For most of the time we spent in the pilot districts for our closer looks, each program was led by dedicated, long-serving people whose intense interest in and commitment to their programs provided the steady and consistent hands at the wheel necessary to help those programs overcome challenges and pitfalls. It is not

yet clear, though, whether any of these programs has reached a point of self-sustainability—that is, a point at which the programs are so embedded not only in the overall activities of their districts but also in the minds of educators that they can sustain the loss of these charismatic leaders.

Considered from a state-level perspective, the close relationship between strong leadership and program success may be problematic: Taking into consideration the longer history of similar programs across the state, the most successful initiatives typically have been at least somewhat complex in nature, had a lot of moving parts, and required constant management³²; districts without the capacity to provide the kind of leadership needed to manage programs of that nature likely will face a greater struggle starting up and sustaining their own programs. Though it is only a partial solution, the leadership challenge may be mitigated to some degree with the help of third-party consultant support—an option exercised by some districts during both the closely-related *Race to the Top-era strategic staffing period and the current pilot period, but an option that is available to most districts only if the state provides them with at least some additional financial resources. Another option may be for interested districts to work in collaboration with other interested districts, or perhaps even in partnership with districts that already have experienced local successes with their own programs, to operate multi-district programs.*³³

Program sensitivity to changes in personnel appears to be an issue at the school level as well. In at least one of the three districts, teachers noted that a key component to school-level success was having teacher leaders who are particularly savvy about the needs and challenges of a specific school. In other words, importing teacher leadership—even if just across a district—may introduce new challenges even while solving others (for example, lack of within-school leadership candidates).

If you don't have the [pre-existing] relationships and the foundation, it makes the work a lot harder. (Lead Teacher).

Similarly, several teachers and administrators in each district noted the challenge of maintaining a program's continuity and effectiveness across years when schools experience turnover in the principal's office. In most cases, program implementation at the school level is proposed and at least co-designed by the principal; if she or he leaves, the program left behind may or may not fit well with the leadership style or vision of her or his successor.

So, the first year . . . I . . . worked with a small group of students in each grade level, and my grade level[s were] K-2. . . . [T]his year, my caseload got a little heavier and I'm coaching kindergarten to third grade with ELA [English Language Arts]. . . . [W]e have a different administrator, so there's a lot of things that have changed for us. . . . It's been different every year, but we've had new administration every year. (Lead Teacher)

Clear Communication Matters

Teachers across the districts noted that an early implementation challenge for many of them was understanding exactly what the leadership roles were all about.³⁴ Without fully understanding the programs, many were hesitant to apply for the roles. After a full year of program implementation and an opportunity to see the results, most understood and embraced the program, but initial engagement was low and sometimes

³² See, for instance, our final evaluation of the related *Race to the Top-era* (2010-2014) strategic staffing initiatives (<http://cerenc.org/wp-content/uploads/2014/09/State-and-Local-Strategic-Staffing-Final-Summative-Report-9-4-14.pdf>).

³³ This option also may help to mitigate another potential challenge (the potential for cross-district fiscal inequities) and address one of the lessons learned (the importance of receiving external planning assistance), both noted below.

³⁴ The *Race to the Top-era* statewide strategic staffing effort experienced similar challenges between 2010 and 2014 (see link above).

characterized by wariness because many teachers did not have a clear understanding of the program's purpose. For example, during Year 1 focus groups in two of our three districts, teachers not in leadership roles shared that they did not have a clear understanding of the advanced teaching roles program overall, nor of the qualifications for becoming a teacher leader. They also were unsure of the targeted outcomes of the program.

[J]ust clearly explaining what it really entails [would have helped]. And I think . . . if you can get [teachers already in leadership roles] to see [that they have] been doing this [already] . . . if they can make that connection, you get more [interest]. (Teacher Colleague)

Implementation Success Takes Time

Perhaps the most important ingredient in the successful establishment of an advanced teaching roles program is patience—and more often than not, that is the one ingredient in short supply in districts that are seeking new ways to improve outcomes. Change takes time, and when that change is tied to something as complex as an advanced teaching roles program, the length of time it takes for that program to reach maturity may have to be measured in years.

To begin with, as with many complex education initiatives, defining success is more complicated than it may appear at first. In addition to standard and expected measures like student academic outcomes and teacher turnover rates, success also can be defined by less easily-measurable outcomes such as changes in faculty and staff approval of the program, or program integration into other district initiatives.

No matter how measured, the experiences across our three sample districts suggest that most districts that decide to implement a new advanced teaching roles program should not expect to see any measurable indicators of success for at least a full year, if not longer. In fact, two of our districts have continued to experiment with their advanced roles formulas for several years as they worked to get them right. In addition, most districts appear to experience success in stages. Part of our ongoing formal evaluation for the state has included the development of an overall Advanced Teaching Roles Theory of Action—a graphic representation of how advanced teaching roles programs appear to work over time. According to that theory of action, most districts probably should expect to see successes unfold across several stages, starting with changes in teacher turnover, followed by noticeable changes in overall school culture, and only after that consistently measurable changes in student outcomes. Evidence from our formal evaluation of the original six pilots bears this out, with positive changes in student outcomes apparent in some schools after only one year, but not across all schools.

The support of the staff and administration to make sure everyone's on the same page, and they know the expectations and what the long-range plan is, and that it's not a quick fix. . . . And that's one thing that they've been stressing since the beginning. . . . It's a long-term goal. (Lead Teacher)

Another measure of success with a longer-horizon time element is buy-in. Conversations with teachers in our focus districts suggest that full buy-in—that is, buy-in among teacher leaders, other teachers, and administrators—likely will take a year or more. For some, the hesitation will come from having to defer to colleagues who are now in leadership roles but who before were on equal terms; for others, the challenge will come from a general wariness about adjusting to “yet another new initiative” In general, beginning teachers appear to be more enthusiastic initially about the program than are veteran teachers, which perhaps should

come as no surprise for a profession in which, by tradition, years of experience has been a marker of seniority. Initially, veteran teachers shared that they sometimes resented being coached by someone with fewer years of experience, but over time that resentment turned to acceptance and support.

[E]verybody didn't welcome this program when we first started in our school, but [now] I've had the privilege of teaching or coaching the same teachers . . . for three years. And so the growth that they've made and the appreciation of the program now as opposed to when it started, it just has made a big difference. (Lead Teacher)

I think we had a sense that hopefully we would make a positive impact and that other colleagues would see that and want to be a part of it. But I do feel like it's stronger this year, like [our colleagues] are actually more, I don't want to say "accepting," but they're really trying to make the strategies work for the kids and make sure that everybody's successful. . . . I think they see that it makes an impact, that it's not just a few kids that it impacts, it impacts more kids, and, if we can share it, not just schoolwide but even districtwide. (Lead Teacher)

I think we didn't realize how much the [teacher leaders] last year were building themselves up to create collaborative groupings and also becoming experts in problems. Like, we only heard bits and pieces of their research, but they worked for a whole year looking at these problems and reading articles, things that we had no clue they were doing. And so [when a colleague] and I walk[ed] into [lead roles] this year, we were like, "Oh, so this is really an extra job for real, we are really, really data-diving," and so I feel like, knowing that, you can respect their process from last year. . . . (Lead Teacher)

Administrators, too, need time to figure out how best to set up their teacher leaders for success:

So, next year, [our principal's] plan of action is [that the] use of our coach will be more efficient, it will be more purposeful. Not that it isn't now but it will be because he'll know and be able to reflect, and say, "Okay, this is what I should have, could have done, and this is the support I need." So it can be more planned and purposeful in the second year of having support. (Teacher Colleague)

Finally, time also is a key ingredient in working out all of the systems and protocols that will arise as a result of the new advanced roles program:

I felt last year like I was missing something. And this year, I don't feel that way. . . . (Lead Teacher)

[This year, program leaders] are more intentional about what they need us to do. And I think for the first year it was a little vague and they were trying to figure out what they wanted and how things were going to look for documentation purposes. . . . [But now, e]verything's [in place]. . . . (Lead Teacher)

There likely is little that can be done about reducing the time it takes for an advanced roles program to take root and start to show positive movement on all of its intended outcomes. As a result, district (and state) leaders should consider tempering their expectations for when they hope to see measurable improvements.

In addition, based on the evolutionary buy-in trajectories in our three focus districts, they also should consider tempering their temptations to manipulate or change their programs during their earliest years and give their programs a chance to grow toward the results they want to see. As a teacher in one of our focus districts noted, finding that patience may be easier if leaders focus more during those initial years on addressing participating staff needs and less on the specifics of the program.

Program Expansion May Extend Cross-District Fiscal Inequities

For some districts, one of the challenges of providing competitive salaries for teachers is the local salary supplement that the state allows districts to offer teachers on top of the standard state salary. While nearly every district (111 of 115 traditional districts) now offers a supplement, the average teacher supplement ranges in value from just over \$100 a year to over \$8,500 a year. One of the advantages of an advanced teaching program is that (if structured well fiscally) it provides a way for some lower-income, lower-resource districts to offer salaries for at least their lead teacher positions at rates that may make coming to (or staying in) their counties financially desirable. Teachers in our closer look focus groups, while quick to note that money alone is not motivation for their decision to take on a lead role, acknowledged that the additional pay certainly helps.

The advantage to districts afforded by these supplements leads to two new problems, however—one immediate, and one down the road. The immediate problem is that, for non-advanced teaching roles districts that can offer little to no salary supplement, there now are more districts that can offer higher salaries (even if only to teachers who take on leadership roles) with which they have to compete for a limited pool of available teachers.

The longer-term problem will materialize as more districts start to develop their own advanced teaching roles programs. To the extent that future advanced roles positions will be funded based on a district's ability to redistribute its existing resources (rather than by a permanent, state-provided supplement), the imbalance created by differences in local salary supplements will be restored, even for lower-wealth districts that have their own advanced teaching roles programs. Larger and locally better-resourced districts likely will be able to offer higher compensations than their less-affluent neighbors, and we will once again face the challenge of attracting higher-quality teachers to lower-performing districts.

One possible solution may be for the state to set guidelines for advanced teaching roles salary supplement scales and also provide at least some guaranteed, means-tested supplemental pay support for lower-wealth districts. Without some way to balance the supplements, some districts will continue to face a steep, uphill climb when it comes to recruiting the best teachers for their schools via financial incentives.

Successful Lead Teacher Support for Beginning Teachers is not Automatic

Though not specified in the enacting legislation as one of the primary purposes for advanced teaching roles programs, the legislation does require the evaluation of those programs to determine whether they provide “assistance to and [support] retention of beginning classroom teachers.”³⁵ While almost by default every pilot program provides some support for beginning teachers (most teacher leaders are veteran teachers, and many of the teachers they lead are classified as beginning teachers), the presence of an advanced roles program alone does not guarantee that it will provide support specifically tailored for beginning teachers, nor that teacher leaders have the skills required to do so.

Beginning teachers in our closer look districts reminded us that they are in the most malleable state of their professional career, a period during which they are (as one said) “deciding what kind of teacher I want to be.”

³⁵ Session Law 2016-94, Section 8.7(f)(4)

Overwhelmingly, administrators and lead teachers stated that their program's support to beginning teachers benefits their professional development and propels them to grow exponentially in comparison to their peers who are not being supported in the same way. In addition, being coached by a lead teacher motivates some beginning teachers to be more intentional and to deliver the best instruction possible each day.

I have been with my coach for three years, and she started coaching me when I was a brand-new teacher. So her coaching really shaped my behavior management, and just some of the basic instructional strategies that I use every day. (Teacher Colleague)

However, beginning teachers also described the added pressure of the attention they get as a result of the program as a hindrance that sometimes negatively colors their perception of the teaching profession.

Behavior changes when you're being watched. . . . I'm always trying to do well. Because I know there's going to be a great deal of scrutiny on a daily basis. I come to school prepared to show I can do the job and do the work. (Teacher Colleague)

I felt a ton more pressure—and that could be just mixed with my responsibilities—but even more expectation to perform and make sure that the kids are performing. And I got to the point right before spring break where it felt like it was all about data. It was all about standards. And that is never how I taught. And I've been somewhat successful in my teaching because it's always been about relationships first. And I don't know if it's just the structure of [our district's program] but I feel through [my teacher leader] the pressure, and their role depends on the data too. And so they need to get the data, so we need to get the data, and it's all about the data. It's all about the standards. And it makes me hate it. Even though I know that's not why I'm in education. (Teacher Colleague)

Just as some teachers expressed concerns about a possible disconnect between the teacher leader application requirements and the expectation that teacher leaders know how to lead adults, these teachers raise important issues about another set of assumptions about the skills teacher leaders bring to their roles. In the [Overall Lessons Learned](#) section, we share some of the solutions teachers and administrators in our districts offered for addressing this and other similar challenges related to teacher leader preparation for their new roles.

Programs Introduce New Time Management Challenges

In addition to needing to know how to be leaders of adults and how to be effective coaches of beginning teachers, lead teachers also have to figure out how to manage their limited time in entirely new ways. On a positive note, though the general feeling of not having enough time in the day persists for teachers not in lead roles, those teachers also noted that the presence of teacher leaders in co-teaching roles has provided them with more time for teaching.

[There is] just so much to do in one day, and I think it has . . . to do with the curriculums [sic] that we teach and how much is in the curriculums. . . . But again, our [teacher leader] has tried to help us bridge topics and [provide our students with the] prerequisite skills they may need so that we wouldn't have to spend quality classroom time getting it to them. (Teacher Colleague)

The toll on some teacher leaders, however, has been challenging, not only in terms of the increase in the number of things for which they now are responsible, but also the amount of time it takes to complete some of

their leadership tasks. For some, the challenge has come in the form of figuring out how to distribute their time across all of the teachers they now lead. One lead shared that, while she only teaches one class by herself, she has struggled to balance the support she gives to each of her teacher colleagues. For others, the greater pressure has been finding a balance between their instructional load and their coaching commitments.

This year, I'm struggling a little bit with time management, and I don't know if it's due to more people or if it's due to the third grade content area. I mean, the third grade is really demanding, and so I find myself spending more time with those teachers instead of being able to [distribute my time] equally. (Lead Teacher)

I need to live up to this coaching commitment, but at the same time I have this instructional load, and that instructional load is tied to me personally. . . . [I]f the teaching and learning's not going on [in my class because of leadership responsibilities], then, well, I can't write DPI and say, "Well, you know what? Hey, I've been doing this, this, and that, and that's why my numbers look like they do." (Lead Teacher)

To address challenges like these, program leads in our three districts have made several program adjustments across the pilot years, and districts starting their own programs should expect to have to do the same as they tweak their programs to better fit the realities of teaching and leading in their districts.

Overall Lessons Learned

The challenges described above—especially those that also characterized previous attempts to establish teacher leadership tracks in North Carolina—are important to acknowledge, not only for districts that currently offer advanced teaching roles but also for those considering doing so. They do not, however, take away from the successes shared at the beginning of this section, nor are they insurmountable. Teachers and administrators across our three districts offered several suggestions for how to improve their programs, and, based on the lessons they have learned over the past three years, they also outlined what they believed are optimal conditions for program success (conditions that they think will help a district to successfully sustain a new advanced roles program). We group these lessons learned into two main categories: *Lessons Related to Initiative Planning* and *Lessons Related to People*.

Lessons Related to Initiative Planning

1. Districts—and to Some Degree, Schools—Need Both Flexibility and Internal Consistency³⁶

Perhaps the most consistent lesson learned cited by teachers and administrators alike was the importance of district- and school-level flexibility: the flexibility to determine what advanced roles to offer, to decide how to structure those roles, and, most importantly, to modify program implementation over time. They emphasized that a one-size-fits-all approach to advanced teaching roles programs likely will result in a no-size-fits-well outcome for most districts.

I'm interested in and excited for these programs we put in place and [for] the money to be there, but I also think that every district, every school is actually different, and so . . . I think that it's really important to allow the flexibility for schools to be strategic about naming and designing what that role is based on what they actually need. (Lead Teacher)

³⁶ Among Pitt County Schools ATR personnel, this is sometimes referred to as "defined autonomy."

The challenge for a district—and for the state as a whole—is figuring out a way to maintain quality and some level of consistency across so many different variations. For example, in one of our three districts, every school has its own plan, and district leadership sometimes struggle to stay on top of how well that is going.

[The program] has specifics on what the roles are supposed to look like, but it [rarely] looks like that [in practice]. For example, they say [my leadership position] can only have this many children and this many teachers, but [leadership] at my old school was like, “I’m giving you [more teachers and students].” It’s hard to be effective in that role when you have that much to do; you’ve lost the whole point of the role. (Lead Teacher)

To strengthen the program, it would be beneficial if there were very clear descriptions of [lead roles]. What we saw last year is very different from what we see this year. And even from school to school, people that are in the same positions are doing completely different things. (Lead Teacher)

As important as it is for each district to structure a program that best meets its needs, at some point, teachers and administrators also need some degree of consistency in role expectations and implementation. Our series of formal evaluation reports begins to outline some of the parameters that may help to achieve this balance, but there likely is more work to be done before the state and the districts hit on the right combination. Lead teachers suggested that one good place to start may be a general design principle based on local (school-level) flexibility, but with district oversight of districtwide fidelity of implementation, along with state-established parameters.

2. Initiatives Must Include a Plan for Sustainable Funding

A related lesson learned is that each district needs a long-term plan for funding its program—one that is not based on time-limited grants or one-time state funding. For many of the pilot districts, their ability to get their programs up and running has been based in part on the availability of some combination of state-provided start-up funds and third-party support.³⁷ In some districts, state start-up funding supported program administration only; none was left over to support the added cost of things like lead teacher stipends. Even beyond the more expensive start-up period, costs can exceed what districts are reasonably able to cover within their existing budgets. Most of a district’s annual overall budget is earmarked for specific purposes, typically making it difficult for a district to support a new program with existing state funding. The enacting legislation gives districts greater budget flexibility to help them repurpose funds as they establish their advanced roles programs, and some of the pilot districts have made good use of this flexibility,³⁸ but doing so sometimes means making hard choices between one expense or another.

Administrators were the first to acknowledge how challenging funding has been, and some even questioned whether and how they could continue to sustain them in the coming years. They lamented in particular the difficult choices to which participation in the program inevitably leads them: Am I willing to sacrifice this position or this support or this resource in order to gain this teacher leadership position?

We used almost all of our Title I budget on this. So, we fully believe in it, right? We fully believe in getting money in the hands of teachers. . . . [But] what about the schools that don’t have the Title I budgets? . . . [A]s that Title I budget gets cut, and as we continue to put as many teachers in [the program as we can], [how will we be] able to afford it? (Administrator)

³⁷ The Pitt County program, for example, has been supported in its first years by a multi-year, \$21 million grant.

³⁸ Often with planning help from third-party organizations, as noted in the next segment.

Teachers are aware of the challenge, too:

We lost all of [our teacher assistant] positions in order to be able to support these roles and have the funding for that. I know that statewide that has been an issue, TA positions have been cut, but we don't even have our TAs anymore in kindergarten. (Lead Teacher)

I think the buy-in will be greater from the staff if the monies were not cutting into our personnel, or our people we hire. I think that's one drawback that we have when we present these models to the staff, because they know they have to give up something to get this. (Lead Teacher)

The lesson learned about funding, then, is not just that each district needs a long-term plan; it is also that each district needs support and buy-in from its administrators and teachers for the difficult decisions that the funding plan is likely to require.

3. Districts Benefit from External Design and Implementation Support

In addition to financial support and planning, districts also have learned the value of having a thought partner to work with during their planning and start-up stages. Nearly every pilot district either built its program on the work of previous initiatives and the lessons learned from those earlier experiments or engaged with an external thought partner during its planning phase.³⁹ The state provided similar support to districts during the *Race to the Top* strategic staffing period. As noted earlier, “external support” does not necessarily mean support from a third-party group; it may simply mean support from fellow districts that either already have established their programs or are in the process of doing so.

4. Initiatives should be Integrated into a District’s Larger Set of Plans

The need for implementation flexibility, sustainable funding, and thoughtful design assistance all hint at the fourth lesson learned regarding planning: the importance of integrating an advanced teaching roles program into the larger and more complex fabric of a district’s full set of programs, initiatives, and goals.

Like every other education initiative, an advanced teaching roles program is not a standalone silver bullet; yes, it is a re-imagining of the traditional structure of school personnel, but that alone is not enough to fully transform a school or a district. To maximize not only the program’s impact but also its successful adoption by all personnel across a school or across a district (both those who participate directly and those who do not—even if they are not directly touched by the initiative, sustainability is much more likely when all members of an education community buy into the goals and purpose of an initiative), the initiative should fit organically into the larger vision for the district.

And your teachers have got to buy into it also. Because if you have teachers that are like, “No, I don’t really want you telling me anything.” then, that attitude is going to get in the way, and it’s going to hinder. (Teacher Colleague)

You’ve got to make sure teachers want to do it. You can’t force them to do it because if they don’t want to do it, then they’re not going to give their best effort and you’re not going to get, for lack of a better term, your money’s worth. (Teacher Colleague)

³⁹ For example, CMS and ECPS worked with Public Impact (<https://publicimpact.com/about-public-impact/>) at various points to develop their implementations of Public Impact’s Opportunity Culture model for supporting teacher leadership.

Lessons Related to People

1. Successful School-Level Implementation Requires Collaboration and Trust

Lessons learned about program planning intersect with lessons learned about the people involved in those programs in a number of ways, but perhaps the most important is the lesson each pilot district learned about the importance of intentionally fostering mutual trust and a truly collaborative spirit among its participants.

So, I think it's been really nice to have that process of just collaborating with people . . . Developing that culture and maintaining the trust has been really big and important for us. (Lead Teacher)

A fail-forward attitude is necessary at every level, because although you may implement it in Year One, it may not bring you the success you're looking for immediately. But down the road the gains are really tremendous. (Administrator)

I think a lot of this, too, is trust. I mean, it has to do with people for sure, personalities, respect, professionalism and the buy-in that this is really for the kids. We're intentional about what's going to be the best for these kids. What's best for children. . . . That's why we're here. . . . And we all need to have the same mindset. I mean, that's important because I'd be honest, I mean, you hear stories at these meetings about some [Communities of Practice] that are Hot Mess Express. They spend more time on getting along, and I'm like, "Woo!" Our biggest problem is wanting to be quiet. And then meet our 3:30 time limit. We're like, "Oh crap, it's 3:35. We got to stop." (Lead Teacher)

As we have noted several times already, successful implementation of a teacher leadership program can be quite complex. An early, consistent, and persistent focus on building trust can go a long way toward making that complexity easier to manage. One group of teachers framed it this way: The program itself does not generate good student results—the program when led by the right team making good decisions generates good results.

2. Leadership Stability is Essential

Building trust and collaboration also requires establishing some consistency in terms of the players involved in the program. By its nature, a teacher leadership program will lead to staffing changes at the teacher level, so that consistency likely will need to come from a core leadership group. This leadership stability is most important during the program's early years, when many of its components are not yet institutionalized enough to help the program weather the impact of personnel shifts.

Changes in leadership can lead to changes in emphasis and changes in interpretation of the program's intent—whether those changes are at the district level or the school level. As an example, several of the participating schools in one of our pilot districts experienced changes in the principalship, and educators in those schools—teachers and principals alike—noted how challenging it was for the school to continue to develop its teacher leadership program when one of the key architects of that plan—the original principal—no longer was at the school. In these schools, program design took place across an entire school year, and transitioning those plans to new building leadership often proved challenging.

The previous principal had orchestrated a[n ATR] model [at my school] . . . that was a little bit different [from what I would have done] in terms of the philosophy. . . . Every school's

doing [ATR] differently. There [are] many schools utilizing this type of flexibility and programming with staffing, but everybody's using it in a different way. . . . [When there is a principalship change, s]omeone is coming in and inheriting a model that was set up by someone else, and how that is navigated can be extremely tricky. (Administrator)

Of note, most of the pilots have been led by the same individuals since their inception; when those leaders inevitably leave,⁴⁰ it will be important to reflect on how a leadership change at that level impacts each program.

[Y]our principal can't know all of those ins and outs, and so when you have a really specific question, [it's important to] have an expert that you have access to. (Lead Teacher)

3. School-level Administrators Need Training and Support

In addition to being steady hands at the wheel within their schools, school-level administrators also need to understand how to get the most out of their program opportunities. That may mean arranging for targeted training and support—something principals and teachers alike recognized:

We still don't know everything that [our lead teachers] were trained with. . . . That's a big missing piece to me because I don't know how much they know. I don't know how much they should be capable of doing because we've not had that type of training. . . . It would be helpful to have the same degree of training that they have to better support them, if nothing else. (Administrator)

[Our administrators] have to definitely know that these people are experts in what they do, and they have to trust them to do what they do. (Teacher Colleague)

4. Teachers Need Training and Support, Too

We noted in the [Overall Challenges](#) section above that there often is a discrepancy between being able to lead students and being able to lead adults. We also noted that not all teacher leaders were innately adept at providing beginning teachers with the support they need. Just like their administrators, then, lead teachers often will benefit from targeted training in what it means to be a leader of teachers.

For example, in one of our districts, lead teachers receive communications training, which they found immensely valuable, as it has allowed them to communicate better and more efficiently in their meetings. In another district, however, lead teachers reported having to figure out on their own how important it is to build relationships with the teachers they were leading, including how best to communicate with them.

In addition, and perhaps just as importantly, several teachers who were not in lead roles noted that their own integration into the program might have been improved with some lead-up training.

[T]he [lead teachers] get a lot of training up front, which makes sense. But there was really never anything, unless I missed it, that we attended as far as like an initial "This is this process. This is how this is going to work. This is what your role is going to be." It was more like our [lead teachers] just came and said, "Hey guys, this is the start." So we sort of all dove in headfirst together when this initially started three years ago, but there was never a "Let's bring all the [teachers] together and talk. . . ." (Teacher Colleague)

⁴⁰As already happened at the end of the 2018-19 school year in one of the districts.

Lead teachers in one of our districts also indicated a related need for more time during the school day devoted to working with their teams and applying what they learned in their trainings.

I would love for us to have a day where we can actually plan with our people. We have a lot going on, and it's hard to meet after school, but having one day devoted to researching or pulling articles with our [Community of Practice], like even if it's a workday or something, but just devoting us time to work with our people. (Lead Teacher)

Common time together was a featured component of only some of the teacher leader programs we observed and may be worth considering as one of the balancing guidelines that the state recommends for all advanced teaching roles programs, when school size and scheduling allow.

5. Lead Teachers are not Administrators

The final lesson learned across our three districts is both subtle and critical: Developing an advanced teaching roles program should not be about increasing the number of administrators in the building; it should be about introducing an altogether new role that works to support both teachers and administrators alike. As a result, teachers and administrators at most of our pilot schools agreed that lead teacher roles should be kept separate from administration in order to be effective.

And I think that [it helps] knowing that we're not admin and we don't evaluate them, [that] we're the middle man: "I want you to do well, so I'm here to support you. I'm your friend." (Lead Teacher)

In schools in which those lines are blurred, the teacher leadership portion of the role has the unfortunate potential to be reduced or disappear altogether, making it harder to build the collegial co-teaching relationships that benefit teachers and students alike.

A student actually last week asked me if I was the boss, if I was in charge. I was like, "No, I'm actually a coach and my job is to help your teacher to help you and it's in turn helping you." But . . . the student recognized that I'm doing so many other things in their eyes, [that to them I became] a boss. (Lead Teacher)

[H]aving . . . a designated time to coach, instead of being pulled this way and [that, hearing] "You've got to go sub down here, and then you have to go do this instead," and then, "Oh you've got to sit in this meeting instead. You can't go watch your teachers today." . . . [T]hey're pulled to do other things all day long and they can't come in and observe us. Therefore, they can't really give us relevant coaching ideas because they haven't been in there to see what we're doing and what's working and what's not. (Teacher Colleague)

Of all of the lesson learned, this last one may be the most important—not only in that it identifies an internal danger that could unhinge the original intended purpose of these pilots, but also that it pulls the covers back on the fundamental shortages and pressing needs that constantly threaten to scuttle any initiative—not just advanced teaching roles—in our schools that need these initiatives the most.

District-Level Lessons

In this section, we share some additional perceived strengths of advanced teaching roles programs, challenges associated with implementing these programs, and lessons learned. In some cases, unlike the information in the preceding section, we only found strong evidence for these additional insights in individual districts. In other cases, we found evidence of what appeared to be a district-specific extension of one of the more general points above.

Even though these insights are perhaps less universal than the ones in the preceding section, they still may provide vital information for other districts that are considering development of their own advanced roles programs—in particular, when a district is similar in nature and structure to one of the three example districts.

Urban District: Charlotte-Mecklenburg

Local Strengths

- Advanced Roles Support Teacher Retention. More so than in most districts, Charlotte-Mecklenburg (CMS) lead teachers noted how much not only the additional pay but also the additional responsibilities made staying in the classroom in particular and in education in general more attractive to them.⁴¹ One administrator described the importance of additional compensation:

[O]ur kids deserve the best, and the best way to get the best and be able to keep the best is to incentivize the best. . . . [A]t my former school we did not do this and I had teachers that were babysitting after school, and who are waitressing after school, and bartending after school, and so they're having three and four jobs to just make ends meet. Now, some of my teachers will take summer jobs and stuff, and they can if they want, but the ones who are in the program at least aren't having to [T]hey understand these are situations where good work is rewarded, and that's the way it is in all of corporate America, so why not? (Administrator)

- Advanced Roles Support Teacher Recruitment. At least one teacher chose her CMS school because of its participation in the advanced roles program. Once she learned of the program, becoming a teacher leader became a professional goal:

I just moved from Florida and one of the things during the interview process is I was only interviewing schools that had the [lead teacher roles] because I know for me personally, that's a place where I eventually want to be at and grow as a professional. . . . And then the money is definitely a reason for that goal, too. . . . So I've been happy that I've had support here. (Teacher Colleague)

Local Challenges

- Lead Roles Can Contribute to Within-School Hierarchies. Some beginning teachers in CMS described having a coach as an added stressor that they believed fostered a competitive work environment. More seasoned teachers agreed that, in many cases, all teachers in their schools who were not in lead roles were treated like first-year teachers.

I know in comparing our stories, with [my colleague] being a first year and me being a fifth year teacher, we had a similar experience early on, so I don't think it's

⁴¹ A top salary supplement over \$18,000 may explain in part the greater importance of pay increases to CMS lead teachers, relative to other teachers interviewed.

differentiation, and even talking across content to other teachers who have different coaches, we kind of all had the same experience of everyone's getting constant observations, everybody's getting this feedback. . . . [N]ow I'll say we're in a space where it's differentiated a bit, but early on we were all just treated as first year teachers. (Teacher Colleague)

Non-lead teachers also identified a critical gap in the structure of the program, with coaches being able to provide feedback to those they coach, but their teacher colleagues are not able to provide feedback to them. They recommended “closing the feedback loop” and allowing lead teachers to receive some feedback from non-leads regarding their coaching strategies.

Local Lessons Learned

- **Local Standards May Need to Reflect Statewide Applicant Pool Realities.** What a district would like to see in its lead teachers may differ somewhat from what is available among teachers in the leadership applicant pool. For example, in order to fill their English Language Arts (ELA) leadership slots, CMS had to lower its Education Value Added Assessment System (EVAAS) criterion for eligibility due to a shortage of qualified ELA teachers statewide.
- **Districts Should Consider Implementing Periodic Assessment of Teacher Leadership.** Lead teachers in one of the programs that predated CMS's current advanced roles program held their leadership positions for “life,” but district representatives noted that this policy did not always lead to optimal outcomes. As a result, CMS now includes a three-year check-in (essentially a re-application) for every teacher leader.

Rural District: Edgecombe

Local Strengths

- **Coupling the Program with Other Teacher Development Programs has been Beneficial.** Overlapping and sometimes redundant—or even conflicting—programs often is a problem in lower-income/lower-performing districts that can become overcrowded with initiatives that everyone hopes will be The Next Great Thing for solving persistent academic problems. Edgecombe County Public Schools (ECPS) appears to have side-stepped this issue to some degree with their advanced roles program by intentionally pairing the work with another program designed specifically to address leadership development—the New Leaders program called Emerging Leaders.⁴² Several lead teachers and administrators noted that it was a good complement to ECPS's advanced roles program, and that it helped to strengthen a key component of the program (development of teacher leadership). The pairing may help to provide a way for less well-resourced districts to address the potential challenge noted above of retaining teacher leaders once advanced roles programs start to spread across the state: less well-resourced districts might be able to use their advanced roles initiatives to develop local teachers with leadership potential, even if they do not initially qualify for leadership roles.

[The] Emerging Leaders program was very beneficial. I don't think I could have known my role and really understood it had I not [gone] through [it]. (Lead Teacher)

I will say this, having some kind of PD program similar to Emerging Leaders matters so much with advanced roles. If you don't have that, unless you have a principal who's an expert in everything, which I'd love to meet that person, you just need something else. (Administrator)

⁴² <https://newleaders.org/programs/emerging-leaders/>

The linkage has led to other positive outcomes as well, most notably an overall improvement in data usage, noticed by both teachers and administrators.

I think the biggest thing at our school . . . was receiving the Emerging Leaders training and gaining a deep understanding of the data-driven instruction process [and] all [that] is involved in that process. Last year . . . I knew that we needed to use our data, I knew that that data should be used and teachers should be assessing that data . . . to plan their instruction, but I really didn't have a process for it. . . . Going through Emerging Leaders and getting all the work around the data-driven instruction and all its protocols, it gave us something tangible. (Administrator)

Local Challenges

- Smaller Schools and Districts May Struggle to Keep Role Responsibilities Reasonable. We heard from teachers not in lead roles who were asked to take on the equivalent of lead roles in schools that needed them to do so. Acknowledging their efforts, administrators tried to ensure that they officially gained the title and compensation by the next school year. Other lead teachers said that at times they felt spread extremely thin but did what was asked of them because their schools needed them to do so:

I wasn't hired for that but it turned into that. (Teacher Colleague)

These teachers were willing to take on more responsibility out of necessity, and ECPS administration was willing to acknowledge that, recognize them, and compensate them for their effort, but the challenge may be important for smaller districts and schools to note: Once defined and formalized, teacher leadership roles may create situations in which even teachers who are not yet formally recognized in those roles are called upon to take on similar duties.

Local Lessons Learned

- Focus on Growing Local Talent in Addition to Recruiting and Retaining Existing Talent. We have raised more than once the concern that, once the presence of advanced roles programs begins to spread, some districts will have a competitive advantage when it comes to recruiting and paying for talent. ECPS administrators and teachers suggested a program component that could allow some districts to focus on talent *development* (identification and development of local teachers with potential) instead of just talent identification and recruitment. Rather than waiting for teachers to demonstrate that they exceed growth on EVAAS (for example) before moving them into leadership roles, districts instead could allow for at least some identification and development of teachers who exhibit that potential—identify them before they are able to be recruited away by another, higher-paying district and develop that potential locally.

[A]ll staff at our school received the same type of training that I received . . . I'm not so sure that that happens everywhere, but because we do it, we're now able to build the capacity of the people in these buildings because now they understand [what we are doing] and we can move them [in]to the [leadership] roles. . . . What we received as [lead teachers], we shared with our school leadership team, we pushed down to our departments as a school-wide effort; they weren't separate entities so we could build the capacity of all teachers in our building. (Lead Teacher)

- There is a Limit to How Large a Class Can Be. ECPS Reach teachers (teachers who take on larger class sizes to allow for more flexibility for other teachers and/or diversion of more instructional funding)

expressed some concerns about their ability to be successful in classrooms with 40 or more students. They suggested that the successes they are seeing with larger class sizes of 30 or more students may not be possible with larger numbers. In other words, districts would be wise to analyze carefully the trade-offs between larger class sizes and the time freed up as a result for lead teachers to work with other teachers.

Urban-Rural Mixed District: Pitt

Local Strengths

- **Teacher Choice.** In Pitt County Schools' (PCS) advanced roles program, teachers who are not in lead roles have the option to participate in the district's Communities of Practice⁴³ (CoPs)—the primary vehicle by which lead teachers impact other teachers—and are not assigned to them. They also are compensated (though not at the same rate as lead teachers) to participate. Teachers characterized this level of choice as a strength that led to a high level of investment largely because their teachers had some agency.

The problem of practice [on which our group focuses] chose us, but we had so much of a part in it going through the research and developing the question and so much buy-in. . . . It doesn't matter what kind of day you had; you come in [to your CoP], you check in[, and within] 5 minutes we're all in the throes of what that problem of practice is and it's great. (Lead Teacher)

All of the members of our mutual CoPs found a lot of benefit in collaborating and we saw a lot of things that, you know as a fifth grade teacher, I may not see in second grade. We had a lot of great conversations and got to dive into the research and talk about it. So, we're looking forward to coming back together as one big group. (Lead Teacher)

- **Enhanced Data Stewardship.** Some Pitt teachers emphasized how their data stewardship has grown as a result of the program, as has how much their understanding of student data now informs their instruction. Conversations among teachers are more focused, and discussions of data and how teachers look at data are both improved:

Teacher 1: I feel like our conversations are much more purposeful. We do look at a lot more data. Last year and this year was the most I've looked at data, I would say, with a purpose. Before we would look at it—

Teacher 2: Makes you think about it in a different way. You're really analyzing it, digging in to it, I think.

Teacher 1: I didn't really have much experience with looking with data before this, so it's definitely given me the skills to help me to know what to look for and that kind of stuff. But then, I am much more intentional with it as well. Like, with our last testing that we just gave, our [state benchmark test] Check-Ins, we looked at each standard separately, whereas before I would just look overall [and say,] "This is what we got. Alrighty."

Teacher 3: I think that . . . some of the beauty of the community is also the collaborative process. From my training, I've been very data-driven all along. But when you really have that cooperation, that collaborative piece, then you have a mix in your group with the veteran teachers, who maybe have different ideas about how to look at data, doing some

⁴³ Unlike Pitt County Professional Learning Communities (PLCs), the CoPs focus on a single challenge mutually agreed upon by the CoP members. Also unlike PLCs, CoPs are not within-grade only; some span multiple grades.

mentoring even just within that little group: how the process the can work, things to look for, and trends over time and longitudinally. (Lead Teachers)

In our travels around the state for various evaluation projects, we continually hear stories about how data literacy, data analysis, and planning and instruction based on those analyses are new territory for teachers—sometimes even for seasoned veterans. What these teachers in PCS talked about (and what teachers in ECPS hinted at) suggests that a potentially large outcome for advanced roles programs is the opportunity they provide teachers to learn together, from each other, how to do things as teachers that individually they were not able to do before.

Local Challenges

- There is a Program Bias toward Elevating Classroom Teachers. Likely a challenge across districts and not just in PCS, teachers expressed a concern that leadership roles tend to skew toward opportunities that make more sense for regular classroom teachers than they do for other instructional staff without a regular, traditional classroom role (e.g., media center staff, literacy specialists, etc.). While these staff members are eligible and have taken on leadership roles, they said they sometimes find it harder to connect to their peers because of their different daily circumstances. It may be important to monitor going forward whether this challenge, if true, limits the degree to which the leadership roles can provide opportunities for growth for all teachers, regardless of their teaching backgrounds and current assignments.
- The Choice Element of the Program may Discourage Key Teacher Groups from Participating. In order to be exposed to the leadership provided by lead teachers in PCS, teachers have to join a CoP. CoP members with whom we talked really appreciated the experience, but they also noted that the additional time commitment and the importance of personal confidence in one's own teaching skills may dissuade beginning teachers from participating (though some beginning teachers in their second or third year do participate). If true, the program's CoP participation requirements may prevent it from reaching a high number of beginning teachers—a key benefactor of most advanced roles programs. Similarly, other teachers who might benefit greatly from participation (for example, teachers who are less-motivated to improve their practice) also might be underrepresented.

Local Lessons Learned

We did not identify any additional lessons learned in PCS beyond those already described in the [Overall Lessons Learned](#) section, above.

Closing Thoughts

We end with a few thoughts from two teacher leaders that we believe summarize nicely several of the themes we have explored in the pages above:

*It's important for people to know that **there's value in trusting educators to investigate and make decisions about what's best for their students** and use things that they've learned from other successful groups to influence what they do with their students. (Lead Teacher)*

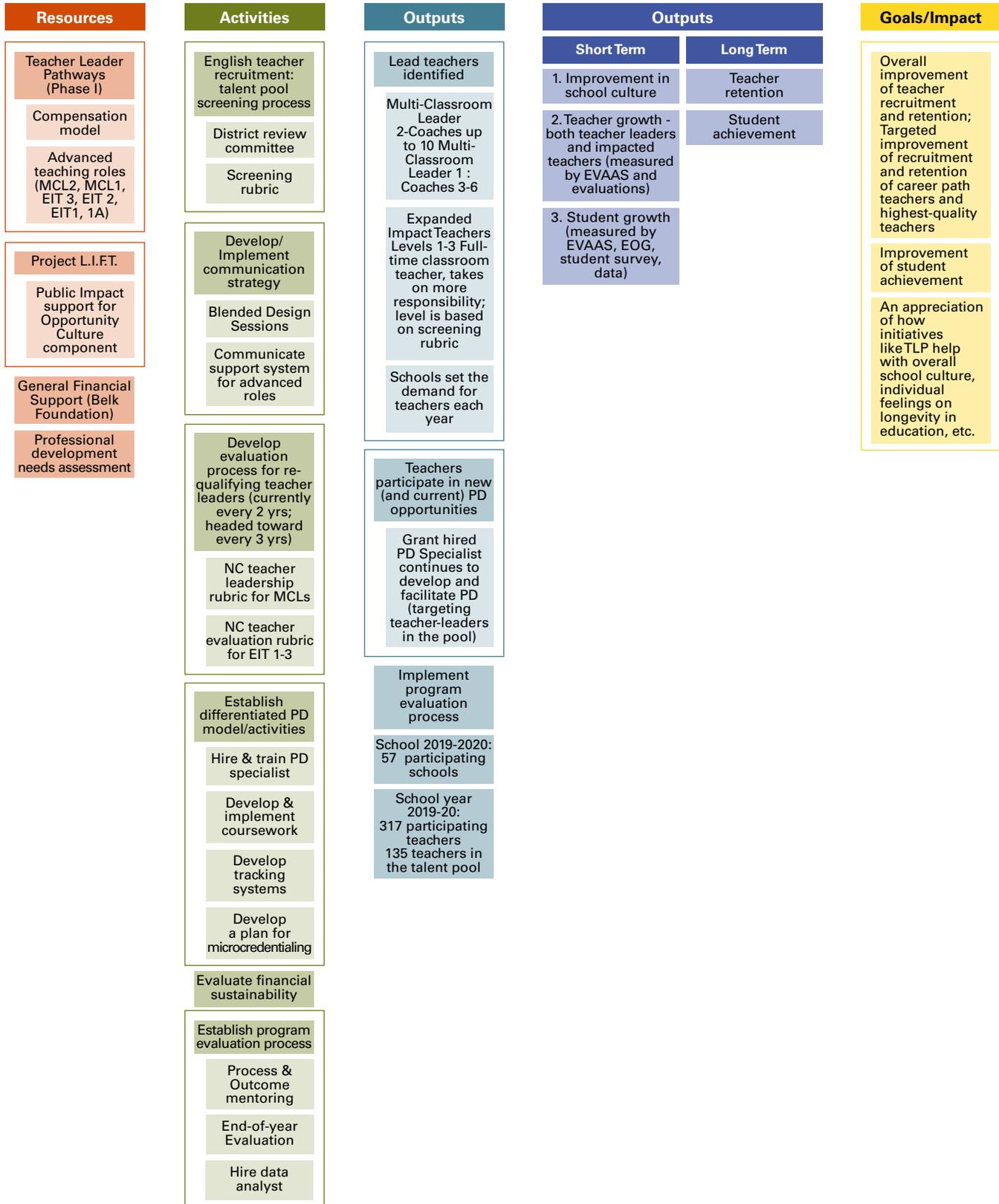
*I think this program is really working and I do believe that it has **made a difference in our school**. I know **the data shows that it does**, but I'm talking about **even with the morale of the teachers**. Even with the **teachers' skill and their ability to feel good about themselves**. So I think the program really works. (Lead Teacher)*

Our conclusion from several years of observing and evaluating programs like the Advanced Teaching Roles Pilots and similar initiatives that preceded them is that these teachers appear to be right. In addition, we believe that providing opportunities for other districts to develop and implement teacher leadership programs appears to be a good move for our state.

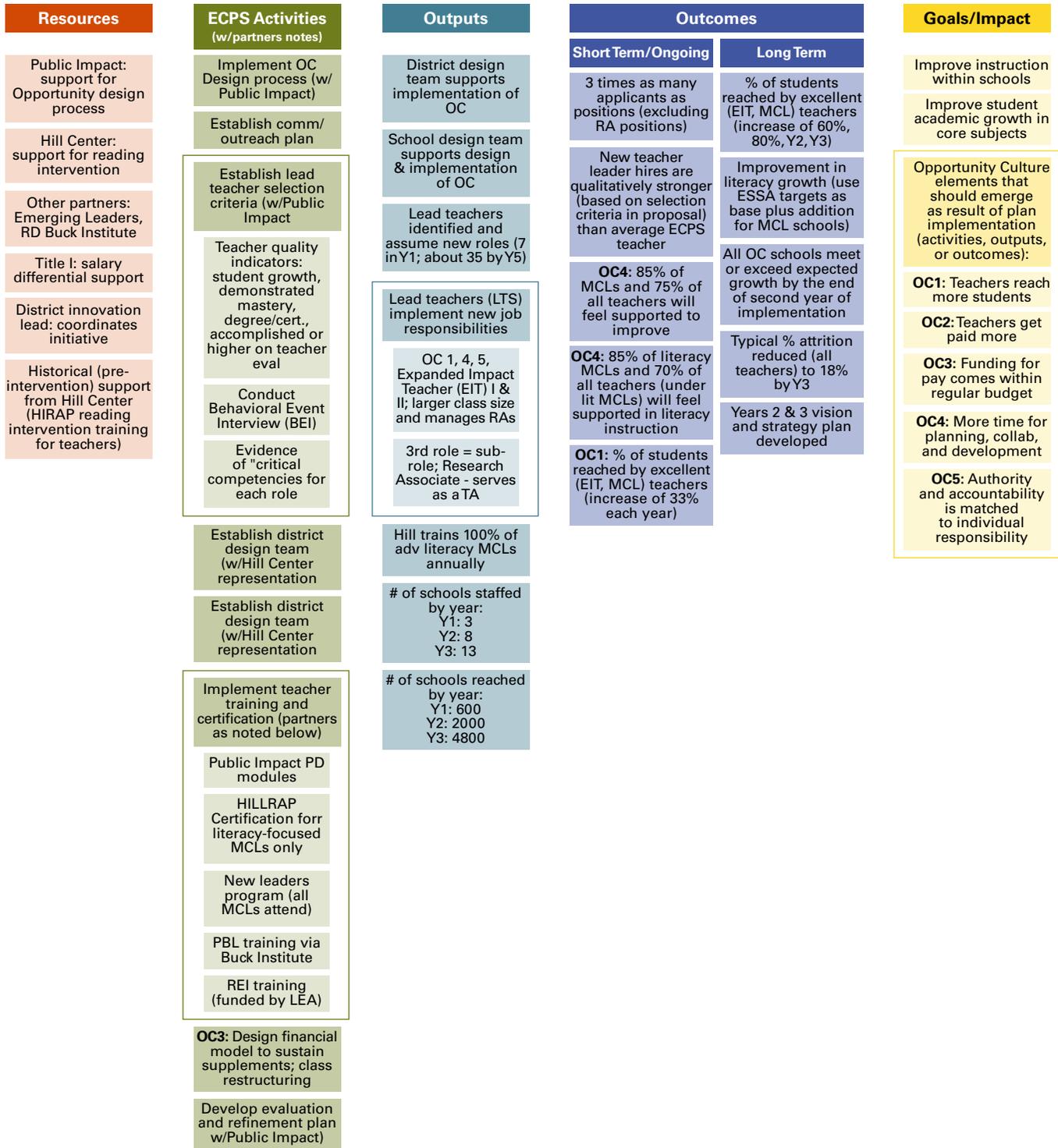
It is not, however—as the challenges and lessons learned explored in this document suggest—a move that can be made lightly and with only a short-term vision. We hope that the stories of the three districts shared in this closer look will help other districts and the state as a whole to build the strong, sustainable, and successful teacher leadership programs that our teachers and their students both need and deserve.

Appendix. District-Level Advanced Teaching Roles Initiative Logic Models

An Urban District with a History of Teacher Leadership Programs: Charlotte-Mecklenburg



A Rural District New to Formal Teacher Leadership Programs: Edgecombe



A Rural-Urban Mixed District with Some Teacher Leadership Experience: Pitt

Resources	Activities	Outputs	Outcomes	Goals/Impact												
<p>Pitt County internal resources committed to the pilot.</p> <ul style="list-style-type: none"> Teachers & building-level admins Central service admin Financial resources Support staff (trainers/coaches) Students Related teachers programs <p>Federal TIF grant support</p> <p>ZSR, Wells-Fargo, PCS Education Foundation, Eddie & Jo Smith Family Foundation financial support</p>	<p>[Pre-training] Teacher Leadership Institute TLI Trains 25 teachers per year - this contributes the candidate pool for the program</p> <p>School leadership teams identify problems of practice (e.g., 3rd grad reading) to be addressed by the new roles</p> <p>Collaborative Action Research topic identified</p> <p>Teacher teams conduct research on ident prob of practice</p> <p>Principals identify Career Pathway teachers (PCS has LEA-developed criteria; there is an application process - helps pull in outside teachers too)</p> <p>PCS DEEL designs Core Professional Learning & provides ongoing coaching for Career Pathway teachers</p> <p>Adaptive School Training: 4-days; for FTs, admin, and all TLLs; facilitated by District Admin</p> <p>Data Driven Dialogue Training: 4-days; for FTs</p> <p>Training on co-teaching and co-planning for MCTs and co-teachers (in partnership w/ ECU)</p> <p>Cognitive Coaching for MCTs, admin, instructional coaches; an abbreviated training is provided for TLLs</p> <p>Differentiated pay system developed</p> <p>Develop/ implement performance-based incentives (based on EVAAS, NCEES, & other criteria TBD)</p>	<p>Collaborative action research approach implemented (classroom level)</p> <p>Career Pathway teachers are in roles</p> <p>Definitions: Facilitating Teacher - 1 class; trains # other teachers Multi-Classroom teacher - pairs with 2-3 other teachers (low green-red)</p> <p>100% Pathway teachers are trained and supported (trained=specifics per role; supported=every FT has a coach (district level staff))</p> <p>Co-teaching classrooms established</p> <p>Differentiated pay system for Career Pathway teachers begins</p>	<table border="1"> <thead> <tr> <th>Short Term</th> <th>Long Term</th> </tr> </thead> <tbody> <tr> <td>Increased leadership skills and capacities of Career Pathways Teacher</td> <td>Decreases in teacher turnover</td> </tr> <tr> <td>Increase in sense of professional rapport and community in the schools</td> <td>Increases in candidate pool for Career Pathway positions</td> </tr> <tr> <td>Initial student achievement gains (=within Facilitating Teacher classrooms) in identified problems of practice</td> <td>Increase in % of highly-effective teachers (15% 2014-15 to 18% 2019-20) and access to them (=increase in # of kids total by 50%) at high-need schools (TIF school)</td> </tr> <tr> <td>Increased retention of highly-effective teachers</td> <td>Longer-term student achievement gains (=across school) in identified problems of practice</td> </tr> <tr> <td>Classroom-level action research vetted and information shared</td> <td></td> </tr> </tbody> </table>	Short Term	Long Term	Increased leadership skills and capacities of Career Pathways Teacher	Decreases in teacher turnover	Increase in sense of professional rapport and community in the schools	Increases in candidate pool for Career Pathway positions	Initial student achievement gains (=within Facilitating Teacher classrooms) in identified problems of practice	Increase in % of highly-effective teachers (15% 2014-15 to 18% 2019-20) and access to them (=increase in # of kids total by 50%) at high-need schools (TIF school)	Increased retention of highly-effective teachers	Longer-term student achievement gains (=across school) in identified problems of practice	Classroom-level action research vetted and information shared		<p>Number of high-performing schools increases</p> <p>District-wide student achievement increases</p> <p>Long-term retention of highly effective teachers and teacher leaders increases</p> <p>Recruitment (both within Pitt Co and outside ["outside" includes ECU]): better quality measured by: already proven</p>
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Contact Information:

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