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Restrictive District Requirements Limited Participation in Performance Pay Systems

at a glance

While all 67 school districts have performance pay plans, these systems vary substantially and relatively few instructional personnel have received these awards. While performance pay plans generally have included FCAT results, most districts also have included other criteria not related to student performance, such as requiring that teachers perform other duties to qualify for awards. As a result, only 50 districts awarded performance pay to instructional personnel for the 2005-06 school year, and only 8,747 persons received these awards, representing 4.9% of instructional personnel statewide.

Scope

As directed by the Florida Legislature, OPPAGA examined school district performance pay plans.¹ Florida law requires school districts to award 5% bonuses to instructional personnel and administrators who demonstrate outstanding performance. We reviewed information provided by districts to compare their current performance plans to statutory requirements, identify the number of instructional personnel and administrators who received performance awards during the 2005-06 school year. We focused our

review on how districts have implemented performance pay requirements.

Background

Historically, most Florida school districts have paid teachers using salary schedules that have been based on input factors such as highest degree earned, and years of experience.

In 1997 the Legislature instructed districts to base a portion of instructional personnel compensation on performance. The 1999 Legislature required districts to implement, by June 30, 2002, performance pay plans that would award 5% bonuses to school administrators and instructional personnel who demonstrated outstanding performance. Districts were to create a reserve fund within their existing budgets to fully fund the additional 5% bonuses.

In implementing performance pay plans, districts are to evaluate instructional personnel primarily on the performance of students assigned to their classrooms or schools, as appropriate. Where applicable, districts must measure student performance by using the designated state assessment test, otherwise known as the Florida Comprehensive Assessment Test (FCAT). In subjects and grade levels that are not covered by the FCAT, districts may use local assessments of student performance.

¹ Section 1012.22(1)(c)4., F.S.

While the statutory language provides districts flexibility in assessing the performance of instructional personnel, the Legislature outlined specific skill-based criteria that districts must include in their evaluation of instructional personnel for performance pay.² These criteria are

1. ability to maintain appropriate discipline;
2. knowledge of subject matter;
3. ability to plan and deliver instruction; the use of technology in the classroom;
4. ability to evaluate instructional needs; and
5. ability to establish and maintain a positive relationship with students' families.

To strengthen performance pay for instructional personnel, the 2006 Legislature established the Special Teachers Are Rewarded (STAR) program and appropriated \$147.5 million for this program. To receive these funds, districts must remove all barriers to eligibility and award 5% performance bonuses to the top performing 25% of their instructional personnel. Districts participating in STAR may use any remaining funds to provide performance awards to school administrators. Districts that elect not to participate in STAR still must implement approved performance pay plans for their instructional personnel. On October 17, 2006, the State Board of Education approved the first district STAR plan. As of the December 31 deadline, all 67 school districts submitted plans and the State Board of Education had approved a total of four district STAR plans.

Findings

How have districts implemented performance pay requirements?

All 67 school districts have established performance pay plans, but these plans vary substantially. As shown in Exhibit 1, slightly less than half of the districts awarded performance pay bonuses to both instructional personnel and school administrators during the 2005-06 school year. However, 17 districts awarded bonuses only to instructional personnel, while 8 gave bonuses only to school administrators. Nine districts made no awards during the 2005-06 school year.³

Exhibit 1
Eight Districts Reported Awarding Performance Pay to Only School Administrators

2005-06 Recipients	Number of Districts Awarding Performance Pay
Both Instructional Personnel and School Administrators	33
Instructional Personnel Only	17
School Administrators Only	8
No Awards to Instructional Personnel or School Administrators	9
Total	67

Source: OPPAGA survey of Florida school districts.

Statewide, districts reported awarding performance bonuses to 8,747 instructional personnel during the year, which represented 4.9% of these persons. These bonuses averaged \$2,293 statewide; the average award for individual districts ranged from \$122 to \$4,460. As shown in Exhibit 2, most of these bonuses were between \$2,000 and \$2,499. Districts also awarded performance bonuses to 739 school administrators, representing 11% of these staff; these bonuses averaged \$3,515 statewide, while the average award amount for individual districts ranged from \$2,008 to \$4,959. Overall, districts reported spending \$22.7 million to award performance pay to their instructional personnel and school administrators during the 2005-06 school year.

²Section 1012.34(3)(a), F.S.

³Eleven districts have not awarded any performance pay to instructional personnel, while 32 have awarded performance pay every year since the 2002-03 school year.

Exhibit 2
Most Districts Awarded Instructional Personnel Bonuses Ranging Between \$2,000 and \$2,499

Average Award Amount	Districts		Instructional Personnel	
\$100 – \$999	1	2%	465	5%
\$1,000 – \$1,999	6	12%	227	3%
\$2,000 – \$2,499	32	64%	6,542	75%
\$2,500 – \$2,999	7	14%	1,314	15%
\$3,000 – \$3,999	1	2%	1	0%
\$4,000 – \$4,499	3	6%	198	2%
Total	50	100%	8,747	100%

Source: OPPAGA survey of Florida school districts.

Districts used student performance as one factor to evaluate instructional personnel for performance pay. Most (59) districts used student achievement in conjunction with other teacher related measures to evaluate their instructional personnel for performance pay.⁴ As shown in Exhibit 3, 52 districts reported using the Florida Comprehensive Assessment Test (FCAT) in these evaluations. In doing so, these districts typically considered student level gains, student level scores, school gains, and school scores. About half of the districts (31) considered other indicators of student performance such as subject area pre- and post-tests, AP tests scores, final exams, teacher-generated assessments, student portfolios and other standardized assessments. Many districts considered multiple indicators of student achievement, such as student FCAT gains, school FCAT scores, and subject area pre- and post-tests. However, eight districts reported that they did not include student performance indicators in their appraisal of instructional personnel.

Exhibit 3
Eight Districts Did Not Report Using Student Achievement When Awarding Performance Pay

Student Achievement Measure	Number of Districts
FCAT	52
FCAT: Student level Gains	41
FCAT: Student level Scores	24
FCAT: School level Gains	20
FCAT: School level Scores	14
Non-FCAT	31
Non-FCAT Scores	21
Non-FCAT Gains	13
No Student Measures Reported	8

Source: OPPAGA survey of Florida school districts.

Many districts used restrictive requirements not related to student performance that limited eligibility for performance pay. In addition to performance criteria, most districts (60) also required instructional personnel to meet other criteria to be eligible to receive performance awards. As a result, some instructional personnel whose students exhibited strong performance may not have received bonuses during the 2005-06 school year. As shown in Exhibit 4, over two-thirds (45) of the districts required instructional personnel to submit an application or Intent to Participate form to be eligible for performance pay. Also, 44 districts required instructional personnel to submit a portfolio that documented their skills or showed that they performed other duties. Further, at least 40 districts required instructional personnel to perform additional duties to qualify for performance pay. These included completing a certain number of in-service hours, assisting with the school improvement plan, conducting a workshop or seminar, serving on an advisory council, serving as the chair of a school-level committee, completing a certain number of volunteer hours, or publishing an article.

⁴ Eight districts did not report using any student achievement measures to evaluate instructional personnel.

**Exhibit 4
Most Districts Established Requirements Instructional Personnel Must Fulfill to Be Considered for Performance Pay**

Requirement in Addition to Regular Teaching Responsibilities	Number of Districts	Percentage of Districts
Application	45	67%
Portfolio ¹	44	66%
Other Duties	40	60%

¹ A portfolio may contain the items contained in "Other Duties".

Source: OPPAGA survey of Florida school districts.

Some districts limited eligibility to select groups of instructional personnel. In these districts, only instructional personnel who held certain credentials or worked in certain schools could receive performance pay. For example, 14 districts (21%) required instructional personnel to have National Board Certification.

Four districts limited performance pay only to their "Teacher of the Year", and one of these districts required the instructional personnel to also teach in a Title I school. Four districts reported limiting eligibility to instructional personnel working in schools that received a certain school grade. For example, one of these districts required instructional personnel to teach in an "A" school to be eligible to receive a performance bonus, although no school in the district had ever received this grade. ⁵

⁵ The highest grade received by schools in this district over the 1999 through 2006 period was a "B".

Agency Response

In accordance with the provisions of s. 11.51(5), *Florida Statutes*, a draft of our report was submitted to the Department of Education to review and respond. The department did not provide a written response to this report.

OPPAGA supports the Florida Legislature by providing evaluative research and objective analyses to promote government accountability and the efficient and effective use of public resources. This project was conducted in accordance with applicable evaluation standards. Copies of this report in print or alternate accessible format may be obtained by telephone (850/488-0021 or 800/531-2477), by FAX (850/487-3804), in person, or by mail (OPPAGA Report Production, Claude Pepper Building, Room 312, 111 W. Madison St., Tallahassee, FL 32399-1475). Cover photo by Mark Foley.

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Appendix A

Performance Pay by District

Table A-1 shows the criteria each district used to evaluate their instructional personnel for performance pay and their average awards for the 2005-06 school year. For the year, 50 districts awarded an average of \$2,293 in performance pay to 8,747 instructional personnel.

Table A-2 shows the performance pay awards distributed to school administrators for the 2005-06 school year. During the year, 41 districts awarded an average of \$3,515 in performance pay to 739 school administrators.

Table A-1
Seventy-Five Percent of the Districts Awarded Performance Pay to Instructional Personnel

	Student Performance Criteria (Outcomes as a Result of Regular Teaching Duties)						Additional Criteria (Requirements in Addition to Regular Duties)				Awards ¹ (Qualified Instructional Personnel in 2005-06)		
	Student-Level Scores (FCAT)	Student-Level Gains (FCAT)	School-Level Scores (FCAT)	School-Level Gains (FCAT)	Non-FCAT Scores	Non-FCAT Gains	Application or Intent to Participate	Portfolio	National Board Certification	Other Criteria	Number of Instructional Personnel Awarded	Average Amount Awarded	Total Amount Awarded ²
Alachua							√	√	√	√	14	\$2,000	\$ 28,000
Baker			√					√		√			
Bay									√	√			
Bradford		√					√	√	√	√			
Brevard	√	√	√	√							429	2,600	1,115,400
Broward				√					√	√	859	2,893	2,485,087
Calhoun		√									12	1,948	23,376
Charlotte							√	√			465	122	56,730
Citrus		√				√	√	√		√			
Clay		√		√							112	2,036	228,032
Collier		√			√	√	√	√			7	2,727	19,089
Columbia						√	√	√			1	3,500	3,500
Dade				√							1,707	2,478	4,229,946
DeSoto				√			√	√		√	4	2,274	9,096
Dixie	√	√			√		√	√		√	1	1,900	1,900
Duval				√			√	√		√	723	2,432	1,758,336
Escambia		√			√		√	√		√			
Flagler		√		√			√	√		√			
Franklin ³	√	√	√	√			√		√	√			

	Student Performance Criteria (Outcomes as a Result of Regular Teaching Duties)						Additional Criteria (Requirements in Addition to Regular Duties)				Awards ¹ (Qualified Instructional Personnel in 2005-06)		
	Student- Level Scores (FCAT)	Student- Level Gains (FCAT)	School- Level Scores (FCAT)	School- Level Gains (FCAT)	Non- FCAT Scores	Non- FCAT Gains	Application or Intent to Participate	Portfolio	National Board Certification	Other Criteria	Number of Instructional Personnel Awarded	Average Amount Awarded	Total Amount Awarded ²
Gadsden	✓	✓	✓	✓	✓		✓				9	\$2,194	\$ 19,746
Gilchrist	✓	✓	✓	✓	✓						195	4,212 ⁴	821,340 ⁴
Glades					✓		✓	✓		✓			
Gulf	✓	✓								✓			
Hamilton							✓	✓	✓	✓			
Hardee		✓					✓	✓		✓	1	2,377	2,377
Hendry	✓	✓						✓			3	2,350	7,050
Hernando							✓	✓		✓	3	1,934	5,802
Highlands							✓	✓			1	2,535	2,535
Hillsborough		✓		✓				✓			1,520	2,363	3,591,760
Holmes									✓		4	1,945	7,780
Indian River	✓	✓									408	2,148	876,384
Jackson											9	2,954	26,586
Jefferson				✓							9	2,168	19,512
Lafayette	✓	✓	✓	✓			✓	✓	✓	✓			
Lake	✓	✓			✓		✓	✓			10	2,295	22,950
Lee	✓	✓			✓	✓	✓	✓		✓	124	2,016	249,984
Leon		✓			✓	✓	✓				115	2,138	245,870
Levy		✓					✓	✓			2	2,043	4,086
Liberty									✓		1	4,460	4,460
Madison			✓				✓	✓		✓			
Manatee													✓
Marion	✓	✓	✓	✓	✓	✓	✓	✓			180	2,069	372,420
Martin		✓					✓	✓		✓	29	2,346	68,034
Monroe		✓					✓	✓		✓	5	2,834	14,170
Nassau	✓				✓		✓				38	1,749	66,462
Okaloosa							✓	✓			60	2,412	144,720
Okeechobee		✓	✓		✓		✓		✓	✓	77	2,105	162,085
Orange	✓	✓			✓		✓	✓		✓	20	2,359	47,180
Osceola	✓	✓					✓	✓			8	2,134	17,072
Palm Beach				✓							1,068	2,087	2,228,916
Pasco	✓				✓		✓	✓		✓	5	\$2,005	\$ 10,025
Pinellas	✓	✓	✓	✓			✓	✓			2	2,000	4,000

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	Student Performance Criteria (Outcomes as a Result of Regular Teaching Duties)						Additional Criteria (Requirements in Addition to Regular Duties)				Awards ¹ (Qualified Instructional Personnel in 2005-06)		
	Student- Level Scores (FCAT)	Student- Level Gains (FCAT)	School- Level Scores (FCAT)	School- Level Gains (FCAT)	Non- FCAT Scores	Non- FCAT Gains	Application or Intent to Participate	Portfolio	National Board Certification	Other Criteria	Number of Instructional Personnel Awarded	Average Amount Awarded	Total Amount Awarded ²
Polk	✓	✓	✓	✓		✓		✓			56	2,312	129,472
Putnam	✓	✓	✓	✓			✓	✓		✓	48	2,181	104,688
St. Johns					✓		✓	✓		✓			
St. Lucie		✓			✓		✓	✓		✓	4	2,561	10,244
Santa Rosa		✓			✓			✓		✓	3	2,236	6,708
Sarasota				✓			✓		✓	✓	169	1,643	277,667
Seminole		✓					✓			✓	161	2,330	375,130
Sumter	✓	✓					✓	✓		✓	19	2,369	45,011
Suwannee		✓					✓	✓		✓	3	2,051	6,153
Taylor		✓			✓		✓						
Union	✓	✓	✓		✓		✓	✓					
Volusia					✓		✓	✓		✓			
Wakulla	✓	✓									14	2,396	33,544
Walton	✓	✓							✓	✓	2	4,109	8,218
Washington	✓	✓	✓	✓	✓		✓	✓	✓	✓	28	2,213	61,964
Statewide Totals	24	41	14	20	21	14	45	44	14	40	8,747	\$2,293	\$20,060,597

¹ Some districts provided best estimates because the exact award amounts were not available for all districts at the time of reporting.

² The total award amounts are calculated by multiplying the number of recipients by the average award amount. The exact amounts may be slightly more or less due to rounding.

³ Franklin reported awarding an average of \$2,316 to nine instructional personnel for the 2004-05 school year, but no awards for the 2005-06 school year.

⁴ Gilchrist step increase raises are based on performance, averaging \$3,877 for each of the qualifying 195 instructional personnel. Gilchrist also awarded bonuses averaging \$393 to 166 of those instructional personnel who demonstrated above satisfactory performance (12 received 5% bonus, 88 received \$341, and the remaining received 66 instructional personnel \$170).

Table A-2
Sixty Percent of the Districts Awarded Performance Pay to School Administrators

	School Administrators Eligible for Performance Pay	Awards ¹ (For Qualified Administrators in 2005-06)		
		Number of Administrators Awarded	Average Amount Awarded	Total Amount Awarded ²
Alachua	√	1	\$4,000	\$ 4,000
Baker	√			
Bay	√	17	3,058	51,986
Bradford				
Brevard	√	25	3,325	83,125
Broward	√	24	4,514	108,336
Calhoun	√			
Charlotte				
Citrus	√	2	4,103	8,206
Clay	√	10	4,013	40,130
Collier	√	14	3,429	48,006
Columbia				
Dade	√	75	3,874	290,550
DeSoto	√			
Dixie	√	8	2,900	23,200
Duval	√	15	3,794	56,910
Escambia	√	26	3,247	84,422
Flagler	√			
Franklin	√			
Gadsden	√	2	2,354	4,708
Gilchrist	√	9	3,324	29,916
Glades	√	2	3,238	6,476
Gulf				
Hamilton				
Hardee	√	4	3,220	12,880
Hendry	√	5	3,395	16,975
Hernando	√			
Highlands	√	13	2,020	26,260
Hillsborough	√	30	3,515	105,450
Holmes	√			
Indian River	√	28	3,720	104,160
Jackson	√	4	2,889	11,556
Jefferson	√	1	3,510	3,510
Lafayette	√			

	School Administrators Eligible for Performance Pay	Awards ¹ (For Qualified Administrators in 2005-06)		
		Number of Administrators Awarded	Average Amount Awarded	Total Amount Awarded ²
Lake	√	103	\$2,008	\$ 206,824
Lee	√	15	3,333	49,995
Leon	√	18	3,031	54,558
Levy	√	7	3,485	24,395
Liberty				
Madison	√	1	2,900	2,900
Manatee	√	9	4,959	44,631
Marion	√	8	3,440	27,520
Martin	√			
Monroe	√	10	4,267	42,670
Nassau	√			
Okaloosa	√			
Okeechobee	√	9	3,228	29,052
Orange	√	64	3,552	227,328
Osceola	√			
Palm Beach	√	137	4,544	622,528
Pasco	√			
Pinellas	√			
Polk	√	9	3,021	27,189
Putnam	√	14	3,239	45,346
St. Johns	√			
St. Lucie	√	1	4,027	4,027
Santa Rosa	√			
Sarasota	√	6	3,548	21,288
Seminole	√	4	4,370	17,480
Sumter	√	4	3,351	13,404
Suwannee	√			
Taylor	√	2	3,037	6,074
Union	√	2	3,046	6,092
Volusia	√			
Wakulla	√	1	3,170	3,170
Walton				
Washington	√			
Statewide Totals	60	739	\$3,515	\$2,597,233

¹ Some districts provided best estimates because the exact award amounts were not available for all districts at the time of reporting.

² The total award amounts are calculated by multiplying the number of recipients by the average award amount. The exact amounts may be slightly more or less due to rounding.