PORTLAND PUBLIC SCHOOLS
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AUDIT REPORT

Teacher Hiring, Assignment, and Transfers: Action Is Needed to Ensure an Equitable Distribution of the Best-Qualified Teachers

May 2005

Finance, Audit, and Operations Committee:

Douglas Morgan, Chair
Julia Brim-Edwards
David Wynde

SUMMARY

Audit results show many positive attributes of the district's teacher workforce but some staffing patterns should be monitored and managed

This report provides district managers and citizens with information to help them understand school staffing at Portland Public Schools. Issues related to how the district hires, assigns, and transfers teachers have been the subject of discussion for some time. Yet, until now, the district has not systematically examined its human resources data to show the differences in staffing patterns amongst schools within the district.

Analysis of school staffing patterns during the 2004-2005 school year revealed many positive attributes of the district's teacher workforce. For example, staffing data show nearly two-thirds of the district's teachers have a master's degree or higher. Data also show many of the district's teachers have substantial classroom experience, with over half having more than ten years' experience. While the audit shows the district's teacher workforce has many strengths, close examination of the data also suggest opportunities for improvement. This report presents 12 figures, examining different aspects of staffing in district schools. Staffing patterns identified include the following:

- Lower performing schools had the highest concentration of the least experienced teachers (figures 1-3).
- Schools with the highest poverty levels had the least experienced teachers (figures 4-6).
- The distribution of teachers with advanced degrees showed some unevenness -- with fewer in higher poverty schools and a concentration in lower performing schools. (figures 7-8).
- Fewer teachers requested transfers into lower performing or higher poverty schools (figures 9-10).
- Teacher turnover was highest in the district's low-performing and higher poverty schools (figures 11-12).

Recommendation: Portland Public Schools should strengthen its teacher staffing process by:

- Identifying specific goals for the equitable distribution of the best-qualified teachers amongst all schools within the district.
- Developing strategies to achieve these goals, working closely with officials from the Portland Association of Teachers.
- Establishing and maintaining a process to track the distribution of the best-qualified teachers and providing appropriate reports to the superintendent and school board.

Background

Portland Public School's annual teacher staffing process Includes three phases or "rounds"

In accordance with Article 10 of the district's agreement with the Portland Association of Teachers (PAT), the school staffing process is accomplished in three phases or "rounds." In round one, teachers who are current employees of Portland Public Schools and have three or more years of experience can apply for any vacant position for which they are qualified. Vacancies are posted for five days and interested teachers have five working days from the time of the initial posting to submit their transfer request. At this stage, it is up to the school principals to select teachers who have applied for a transfer.

The second phase of the district's teacher staffing process -- known as round two -- is a placement process conducted by Human Resources staff with the assistance of district administrators. In round two, teachers returning from a leave of absence of more than one year and teachers unassigned from their current position, who were either not eligible to apply in round one or were not selected in round one, are offered positions left over from the first round. Teachers may become unassigned due to declining enrollment at their school because of a change in the district's staffing formula determined during the budget process, or because of program changes. Under Article 10, teachers with the least seniority are generally "unassigned" first. Exceptions to this "last

in, first out" rule may be made if a newer teacher has significantly greater experience or training related to an assignment or classification, has an extended responsibility assignment, is a department chair, or occupies one of five other extra duty positions designated by a principal.

Rounds one and two are limited to internal candidates; round three is the first opportunity for applicants from outside the district to apply

The final phase of the hiring process -- round three -- is the first opportunity for applicants from outside the district to apply for a teaching position with Portland Public Schools. Internal applicants can still apply if they are properly licensed. In round three, if the qualifications of an internal and an external candidate are found to be equal, as defined by the collective bargaining agreement, the internal transfer candidate must be selected. If a transfer candidate is selected in round three, an additional vacancy is created which then must be filled. All vacancies must be posted for internal candidates until two weeks before school starts, at which time the district no longer posts vacant positions.

School Administrators and Union Officials Disagree About the Impact of Article 10

Surveys and interviews suggest that school principals and other officials are concerned that the district's teacher staffing process is cumbersome and does not serve the best interests of schools. School principals believe the rounds system has a negative impact on their ability to select teachers based on school or program needs. Principals raise concerns that the district is unable to hire the best and the brightest new teachers because of its awkward hiring process that results in late hiring. Concerns have also been expressed that low performing schools and schools in lower income areas may have more teachers with little experience than do schools in higher income areas. Moreover, principals are concerned about a perceived high teacher turnover and lack of applicants at difficult schools.

PAT officials counter that Article 10 was a voluntary agreement between the district and its teachers. They describe this as an issue of respect, a reward to loyal and good employees. PAT officials argue that teachers who have been

around for awhile should have the ability to teach where they want to. They believe it is the teacher who knows best where they are most qualified. PAT officials explain a teacher may request a transfer because they want to be closer to their home, are interested in teaching a different grade or subject, or are looking for an opportunity to be reinvigorated after many years in one school. Teachers may request a transfer because they don't like a principal or other staff, PAT officials say, but that is not a common reason. Burn out and poor public perception of certain schools were other factors cited for transfer requests. Although the reasons behind a transfer request can be positive or negative, it is usually positive and never about children, according to PAT officials.

Neighboring Districts Report Considering Internal and External Teaching Candidates Simultaneously

Other districts reported providing no hiring preferences for internal candidates over external candidates

In a survey of human resource managers from other school districts in the Portland metropolitan area, all districts reported they allow teachers to request transfers to vacant teaching positions and several reported in-district candidates are guaranteed an interview. Other than Portland Public Schools, however, no other district reported they provide any hiring preference for internal candidates. During the third round of hiring in Portland Public Schools, which is the only round in which outside candidates can apply, internal candidates are given preference over outside candidates if qualifications are equal. Moreover, under its collective bargaining agreement, Portland Public Schools may only consider the following criteria in making that comparison: proper license, affirmative action goals, significantly greater experience or training, and ability to perform a high level extra duty assignment. The other Portland area districts reported their principals were not bound to accept a transfer candidate if they felt an outside candidate was the better choice.

Another difference between Portland Public Schools and other school districts in the Portland area concerned the degree to which school principals were involved in the teacher hiring process. While principals with Portland Public

Schools do some of the teacher candidate screening, check some of the references, conduct interviews, and make hiring recommendations, principals in the other districts were reported to have more control over the hiring process. Other districts reported their principals were "extremely" involved in teacher hiring decisions, involved to the "maximum extent," "intimately involved," or involved "up to their elbows." Portland Public Schools hiring process stood out from this pattern, in that the district's round two placement process was conducted mainly by human resources staff, with assistance from district administrators. In round two, unassigned teachers are guaranteed a position. Round two drew the most criticism of any part of the process because principals felt they were forced to accept individuals who were either not the best candidate or were not a good fit for their school.

Conclusions

Action is necessary to ensure an equitable distribution of the best-qualified teachers

It is a commonly understood problem in education that many highly qualified teachers tend to gravitate toward higher performing schools. Results of this audit show Portland Public Schools has not escaped this problem. While many in the district have expressed concern about this, a solution has proven to be difficult, particularly because teacher staffing procedures are largely proscribed by the district's collective bargaining agreement with its teachers. The issue of how to accommodate teacher transfer requests, without causing inequity in the distribution of the best-qualified teachers requires action at the highest levels. To clear the way for a stronger teacher staffing process this report calls for focused objectives for teacher staffing, new staffing strategies developed in collaboration with the teacher's union, and better management information. Finding a solution is vital to ensure that the district fulfills its goal to close the achievement gap.

Objectives, Scope, and Methodology

In October 2004, the Superintendent and Chair of the School Board's Finance, Audit, and Operations Committee requested an audit of the district's teacher hiring, assignment, and transfer process. The Superintendent and Chair were interested to know if Portland Public Schools were experiencing teacher staffing problems resulting from the district's human resource management practices. They were also interested in learning more about how the district's staffing procedures compare to procedures in other districts. Accordingly, the research for this report centered around the following questions:

- What are the differences in staffing patterns amongst schools within the district?
- How does the district's teacher staffing process compare to other districts?

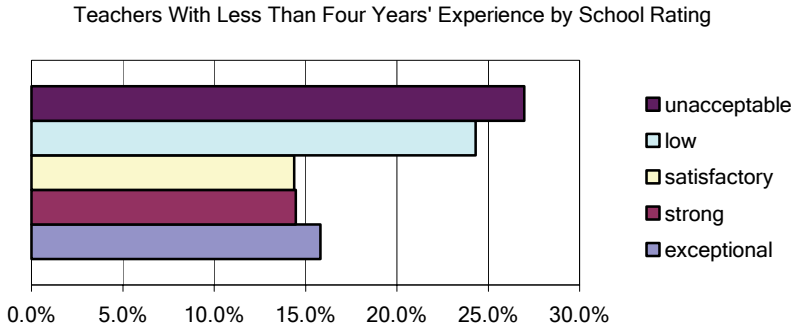
Research was conducted between October 2004 and March 2005. It included obtaining an understanding of the district's process for hiring and assigning teachers by interviewing human resources personnel and reviewing relevant documents. Interviews were conducted with school principals and officials from the Portland Association of Teachers. Human resources data was obtained, tested, and analyzed. Analysis included only those schools rated by the Oregon Department of Education in their 2003-2004 district report card for Portland Public Schools. Reports from other organizations were reviewed. A survey of human resources officials from other Portland area school districts was conducted.

Acknowledgments

Individuals from the human resources and finance departments assisted with the research for this report. Their assistance was greatly appreciated.

EXHIBITS

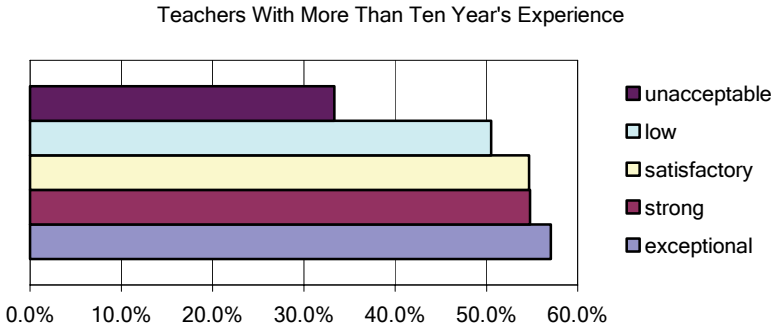
1. Lower Performing Schools Had a Higher Concentration of Newer Teachers



- District teachers who worked in lower performing schools were more likely to have less than four years of experience than their counterparts in higher performing schools.
- Teachers in schools rated *unacceptable* and *low* had a greater than average percentage of these newer teachers by margins of 71 and 54 percent, respectively.

School Rating & *Number of Schools*	Percent With Less Than Four Years' Experience	Percent Above or Below Average
Unacceptable -- *1*	27.0%	+71%
Low -- *4*	24.3%	+54%
Satisfactory -- *33*	14.4%	-9%
Strong -- *35*	14.5%	-9%
Exceptional -- *17*	15.8%	0%
Average	**15.8%**	**0%**

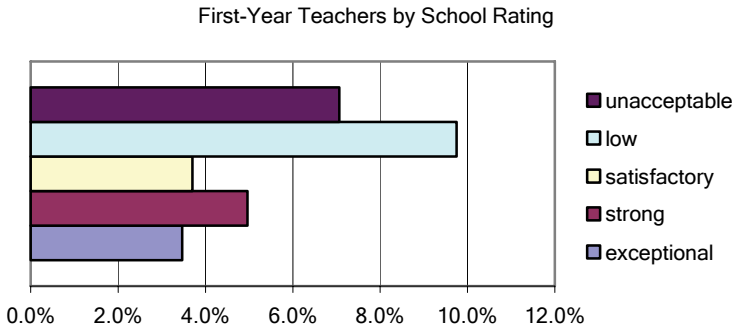
2. Highly Experienced Teachers Were Less Likely to be Assigned to Lower Performing Schools



- Schools rated more highly on the Oregon Department of Education 2003-2004 district report card had a higher percentage of teachers with greater than 10 years of experience than did lower rated schools.
- Schools rated *low* and *unacceptable* had a lower than average share of teachers with ten years' experience or more by margins of 7 and 38 percent, respectively.

School Rating & *Number of Schools*	Percent With Ten or More Years' Experience	Percent Above or Below Average
Unacceptable -- *1*	33.3%	-38%
Low -- *4*	50.5%	-7%
Satisfactory -- *33*	54.7%	+1%
Strong -- *35*	54.8%	+1%
Exceptional -- *17*	57.1%	+6%
Average	**54.1%**	**0%**

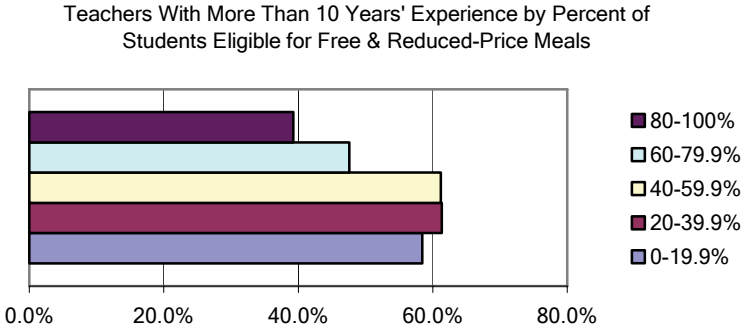
3: Low-Performing Schools Had the Highest Concentration of First-Year Teachers



- Compared to higher rated schools, lower rated schools had a higher concentration of first-year teachers.
- Schools rated *unacceptable* and *low* had higher than average percentages of first-year teachers by margins of 52 and 109 percent, respectively.

School Rating & *Number of Schools*	Percent First-Year Teachers	Percent Above or Below Average
Unacceptable -- *1*	7.1%	+52%
Low -- *4*	9.7%	+109%
Satisfactory -- *33*	3.7%	-21%
Strong -- *35*	5.0%	+6%
Exceptional -- *17*	3.5%	-26%
Average	**4.7%**	**0%**

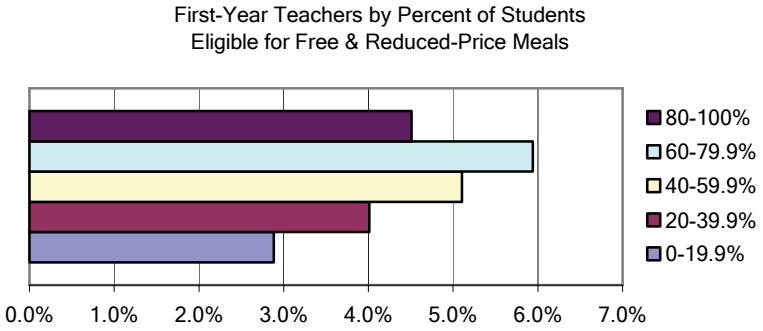
4. Schools With the Highest Poverty Levels Had Relatively Fewer Highly Experienced Teachers



- Schools with the highest concentration of students eligible for free and reduced-price meals (i.e., schools with the most poverty) had relatively fewer teachers with greater than ten years of experience.

Percent Eligible for Free & Reduced-Price Meals & *Number of Schools*	Percent With Ten or More Years' Experience	Percent Above or Below Average
80 to 100% -- *8*	39.2%	-27%
60 to 79.9% -- *30*	47.6%	-12%
40 to 59.9% -- *15*	61.2%	+13%
20 to 39.9% -- *17*	61.4%	+13%
0 to 19.9% -- *20*	58.4%	+8%
Average	**54.1%**	**0%**

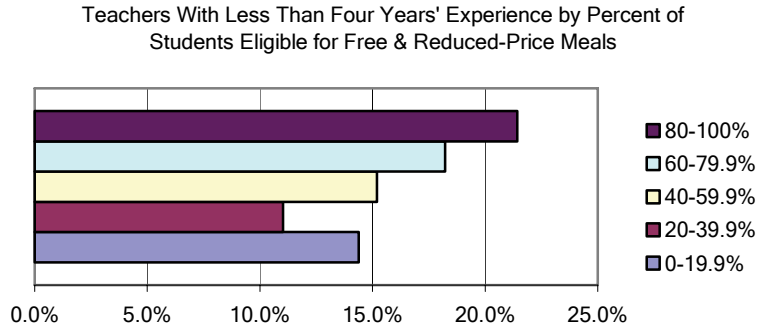
5: First-Year Teachers Were Scarcer at Lower Poverty School



- Schools with lower poverty levels tended to have fewer first-year teachers, compared to higher poverty schools.
- Schools in the two brackets with the lowest poverty (0 to 19.9 percent and 20 to 39.9 percent) had less than the average percentage of first-year teachers by margins of 38 and 14 percent respectively.

Percent Eligible for Free & Reduced-Price Meals & *Number of Schools*	Percent First-Year Teachers	Percent Above or Below Average
80 to 100% -- *8*	4.5%	-3%
60 to 79.9% -- *30*	5.9%	+27%
40 to 59.9% -- *15*	5.1%	+9%
20 to 39.9% -- *17*	4.0%	-14%
0 to 19.9% -- *20*	2.9%	-38%
Average	**4.7%**	**0%**

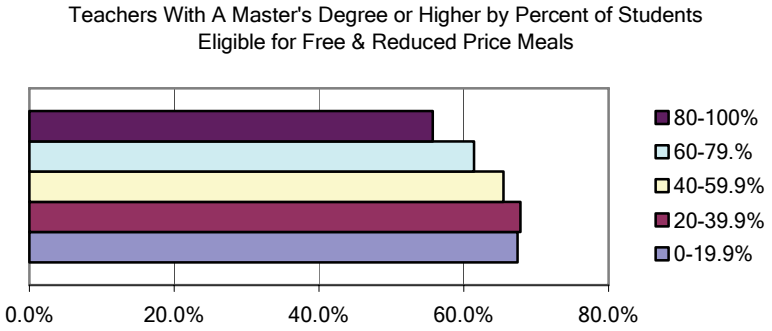
6. Schools With Higher Poverty Levels Had a Larger Percentage of Newer Teachers



- Higher poverty schools had a larger percentage of teachers with less than four years of experience, compared to lower poverty schools.
- Schools in the two highest poverty brackets (80 to 100 percent and 60 to 79.9 percent) had 35 and 15 percent more than the average percentage of these teachers with limited experience.

Percent Eligible for Free & Reduced-Price Meals & *Number of Schools*	Percent With Less Than Four Years' Experience	Percent Above or Below Average
80 to 100% -- *8*	21.4%	+35%
60 to 79.9% -- *30*	18.2%	+15%
40 to 59.9% -- *15*	15.2%	-4%
20 to 39.9% -- *17*	11.0%	-30%
0 to 19.9% -- *20*	14.4%	-9%
Average	**15.8%**	**0%**

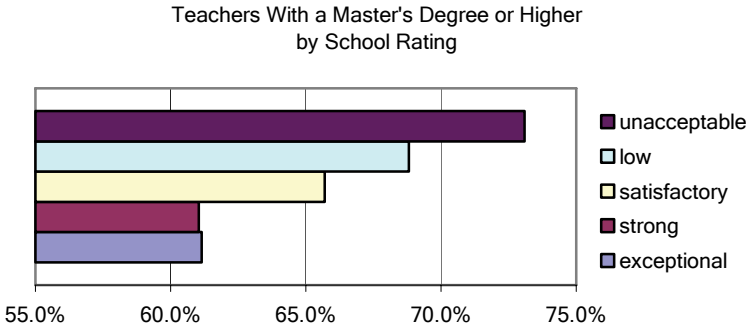
7. Higher Poverty Schools Had Relatively Fewer Teachers With Advanced Degrees



- Schools serving high concentrations of poor students had relatively fewer teachers with advanced degrees.
- The two highest poverty categories (80 to 100 percent and 60 to 79.9 percent) had less than the average percentage of teachers with advanced degrees by 13 and 4 percent margins, respectively.

Percent Eligible for Free & Reduced-Price Meals & *Number of Schools*	Percent of Teachers With a Master's Degree or Higher	Percent Above or Below Average
80 to 100% -- *8*	55.7%	-13%
60 to 79.9% -- *30*	61.4%	-4%
40 to 59.9% -- *15*	65.5%	+2%
20 to 39.9% -- *17*	67.8%	+6%
0 to 19.9% -- *20*	67.4%	+5%
Average	**64.1%**	**0%**

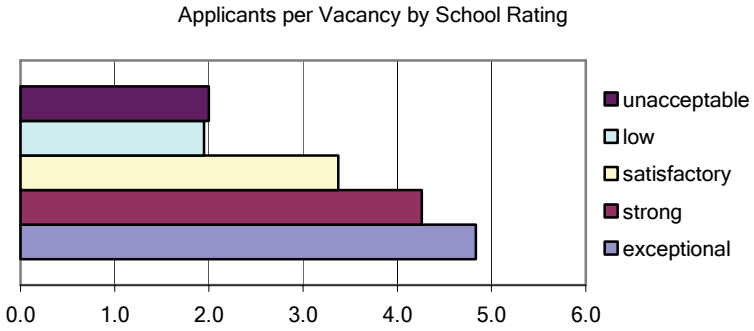
8. Teachers With Advanced Degrees Were Concentrated in Lower Performing Schools



- Schools rated *exceptional* or *strong* had a somewhat smaller than average percent of teachers with advanced degrees, by an equal margin of 5 percent.
- On the other hand, schools rated *satisfactory*, *low*, or *unacceptable* had a higher than average percentage of these highly educated teachers by 2, 7, and 14 percent margins, respectively.

School Rating & *Number of Schools*	Percent of Teachers With a Master's Degree or Higher	Percent Above or Below Average
Unacceptable -- *1*	73.1%	+14%
Low -- *4*	68.8%	+7%
Satisfactory -- *33*	65.7%	+2%
Strong -- *35*	61.0%	-5%
Exceptional -- *17*	61.1%	-5%
Average	**64.1%**	**0%**

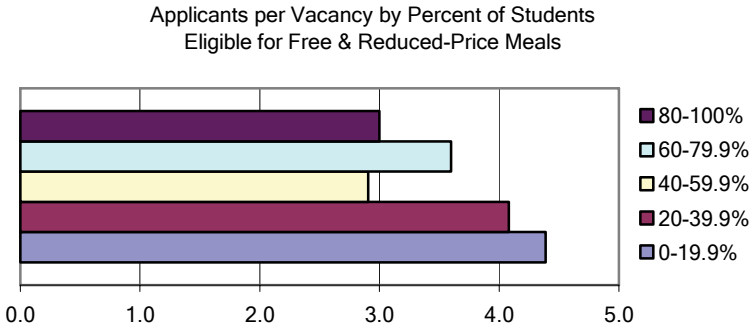
9. Relatively Few Teachers Requested Transfers Into Lower Performing Schools



- During the 2003/2004 school year, there were relatively fewer teachers requesting transfers into low-performing schools.
- The ratio of applicants per vacancy varied from a high of 4.8 to 1 in schools rated exceptional, to a low of 1.9 to 1 in schools rated low.

School Rating & *Number of Schools*	Applicants per Vacancy	Percent Above or Below Average
Unacceptable -- *1*	2.0	-45%
Low -- *4*	1.9	-47%
Satisfactory -- *33*	3.4	-8%
Strong -- *35*	4.3	+16%
Exceptional -- *17*	4.8	+32%
Average	**3.7**	**0%**

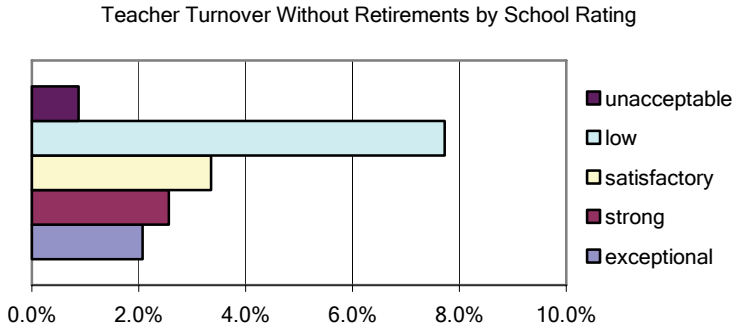
10. Relatively Few Teachers Requested Transfers Into Higher Poverty Schools



- Schools with the most student poverty tended to have fewer teacher transfer applications, compared to schools with less student poverty.
- The ratio of applicants per vacancy was highest in schools with the lowest rate of student poverty (0-19.9%).

Percent Eligible for Free & Reduced-Price Meals & *Number of Schools*	Applicants per Vacancy	Percent Above or Below Average
80 to 100% -- *8*	3.0	-18%
60 to 79.9% -- *30*	3.6	-2%
40 to 59.9% -- *15*	2.9	-21%
20 to 39.9% -- *17*	4.1	+11%
0 to 19.9% -- *20*	4.4	+20%
Average	**3.7**	**0%**

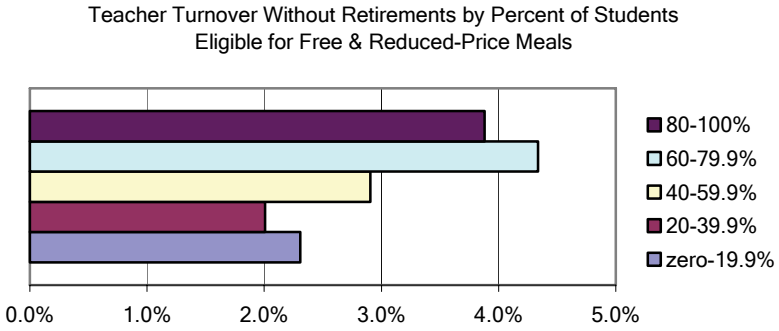
11. Low-Performing Schools Had the Highest Rate of Teacher Turnover



- *Low* rated schools had the highest level of teacher turnover, for reasons other than retirement.
- 7.7 percent of teachers in *low* rated schools left their jobs for reasons other than retirement, nearly two and a half times the average turnover rate of 3.2 percent for all schools in the district.

School Rating & *Number of Schools*	Percent Turnover Without Retirements	Percent Above or Below Average
Unacceptable -- *1*	0.9%	-73%
Low -- *4*	7.7%	+142%
Satisfactory -- *33*	3.4%	+5%
Strong -- *35*	2.6%	-20%
Exceptional -- *17*	2.1%	-35%
Average	**3.2%**	**0%**

12. Teacher Turnover Was Greatest in Higher Poverty Schools



- Schools with the highest levels of student poverty had more teacher turnover, for reasons other than retirement.
- Schools in the two highest student poverty brackets (80 to 100 percent, and 60 to 79.9 percent) had higher than average teacher turnover, by margins of 21 and 36 percent respectively.

Percent Eligible for Free & Reduced-Price Meals & *Number of Schools*	Percent Turnover Without Retirements	Percent Above or Below Average
80 to 100% -- *8*	3.9%	+21%
60 to 79.9% -- *30*	4.3%	+36%
40 to 59.9% -- *15*	2.9%	-9%
20 to 39.9% -- *17*	2.0%	-37%
0 to 19.9% -- *20*	2.3%	-28%
Average	**3.2%**	**0%**

RESPONSE

The purpose of this report is to support the school board in meeting its responsibilities and to help improve the performance and ensure the accountability of Portland Public Schools for the benefit of the citizens of Portland.

PORTLAND PUBLIC SCHOOLS

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Maureen Sloane
Human Resources Counsel

Memorandum

TO: **Vicki Phillips**

FR: **Maureen Sloane**

DT: **July 29, 2005**

RE: **Response to Audit Report on Teacher Hiring, Assignment and Transfer**

Those of us who work in Human Resources are very pleased that this audit has been performed. We have believed for some time that there are a number of issues regarding teacher staffing that need to be addressed. This report is a good start. However, the report itself is limited because of the limited criteria used to define a qualified teacher. In determining what teachers were best qualified, the auditor identified only the criteria of experience and education. There are other criteria that principals routinely use in determining whether or not a particular teacher is a good fit for a particular school. Those criteria are much more difficult to quantify in an audit such as this but should be included in an analysis of how the District matches teachers with schools.

In addition, this audit did not analyze whether a particular portion or section of the collective bargaining agreement caused the identified inequities. Article 10 of the PAT agreement, which is the article which governs teacher staffing, has many different provisions. It is unclear if the audit is calling for a complete change in the teacher hiring process or whether the changes can be smaller. At this point, we do not have enough information to identify whether wholesale changes are needed.

The staff in Human Resources would be pleased to participate in further studies of the issue as well as developing new staffing strategies with the union as recommended by the report.

MRS:hg