

An Explanatory Model of Teacher Movement Within Ontario School Boards

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Abstract

Teacher movement within school boards is examined using multiple case study. Emergent themes achieved theoretical saturation and are consistent with the research literature. In this paper, the relationships between the themes are used to develop a substantive theoretical model of teacher movement within school boards. The model uses a two-phase chronology of events that arise during teacher movement. The two phases are the short-term chronology of teacher transfer events, and the other is a long-term chronology of lifestyle over a teaching career. The model is consistent with all findings in this study and concordant with findings by other researchers.

Keywords: teacher movement, mobility, teacher transfer

There is a considerable literature regarding the movement of teachers between schools (Barbieri, Rossetti, & Sestito, 2011; Feng & Sass, 2011; Guarino, Brown, & Wyse, 2011; Jackson, 2013; Keigher, 2010; Thorton, Perreault, & Jennings, 2008). Many underlying concepts have been investigated and have led to many different interpretations. However, a shortcoming of the existing literature is the emphasis on quantitative research. While the quality of the research is not in doubt, its capacity to draw out contextual details is severely constrained by the emphasis on one methodology. In this paper, multiple case study is used to investigate whether contextual details can clarify particular interpretations. In particular, within Ontario, Canada, this study sought to develop an explanatory model of teacher movement.

Teacher movement between schools begins with projections of the number of teachers required at each school the following year. If there are too many teachers in a school, then teachers in that school may be designated as surplus or redundant. Surplus teachers are guaranteed a teaching position, but it is unlikely to be at their current school. Redundant teachers will no longer have a position with the school board unless they apply to fill an unanticipated position. Teacher moves follow a process that is typically carried out in two stages. The first allows existing permanent teachers, including surplus teachers, to apply to fill any position that will be vacated. Redundant teachers are excluded from this process. The process typically has seniority considerations and requires an application and interview.

Ontario, where this study was conducted, has 31 public English school boards (Ontario Ministry of Education, 2017) that cover half a million square kilometres. School boards are generally large compared to other jurisdictions, and this may allow Ontario teachers more options, such as urban or rural, when moving within a school board. The scope of this study was constrained

to movement within public secondary schools that have Grades 9 to 12. This choice confined the sampling to secondary schools, where department structures and only four grade levels constrained the options for teachers to change their teaching focus, without moving between schools. Ontario has a professional regulatory body, the Ontario College of Teachers, and all participants in this study belonged to the professional body.

Literature Review

Teacher movement consumes time because it entails interview processes and decisions about suitability of candidates. The process is disruptive to the professional activities of a teacher, and there are many uncertainties when the process is underway. The institutional impact and associated costs have led to considerable study of teacher movement, whether between schools within a school board, between school boards, or leaving the profession.

Many relevant concepts have been identified in the research literature (Sibbald, 2017a) and these have led to a variety of explanations for teacher movements. The many recognized concepts are confounded within the context of teaching. For example, movement in relation to relatives has been observed (Denzler & Wolter, 2009), but it has not been demonstrated that teachers move because of relatives, nor has it been demonstrated that knowing the location of relatives allows one to identify which teachers will be inclined to move between schools.

Fifteen concepts have been identified as showing relevance to teacher movement (Sibbald, 2017a; Sibbald, 2017b); they are not defined because it is tangential to the rest of the paper. The concepts are: leadership issues (Thorton et al., 2008); policy issues (Sibbald, 2017a); quality of match to peers (Feng & Sass, 2011) and the school environment (Jackson, 2013); movement away from low socio-economic and at-risk schools (Barbieri et al., 2011; Guarino et al., 2011); building issues (Thorton et al., 2008); efforts to improve one's working conditions (Lankford, Loed, & Wyckoff, 2002); opportunities for promotion and growth (Thorton et al., 2008); to address productivity (Feng & Sass, 2011; Goldhaber, Gross, & Player, 2007); financial gain (Guarino et al., 2011); proximity to their own schooling (Reininger, 2012); birth place (Barbieri et al., 2011), and relatives (Denzler & Wolter, 2009); and personal factors including commuting (Hornig, 2009; Keigher, 2010), stress (Sibbald, 2017a), and cultural elements of both teacher and students (Boyd, Lankford, Loeb, & Wyckoff, 2005; Hanushek, Kain, & Rivken, 2004). Definitions are not provided beyond the references because the methodology pursues a semi-open coding approach to interpret each concept based on a characteristic sense rather than a specific detailed definition. Note that these concepts may coexist or overlap, and it is quite likely that there are spurious occurrences where they are entangled.

The concepts that have been identified are sufficient to achieve theoretical saturation (Sibbald, 2017a). There may be additional concepts that are pertinent elsewhere, but in terms of theory development, saturation in one location provides an opportunity to consider the issue theoretically for that jurisdiction. The concepts have been considered elsewhere individually or in small clusters, but the development of an explanatory model, to the best of the author's knowledge, does not appear in the academic literature.

Methodology

The methodology is qualitative with a philosophical assumption that "Reality is subjective and multiple, as seen by participants in the study" (Creswell, 2007, p. 17), considering multiple perspectives to interpret details of different events that inform the development of an explanatory model. A postpositivist paradigm (Creswell, 2007) is adopted using multiple case study to address the theoretical need to balance deterministic policy processes with contextual details that are demonstrative of policy components applied at different times to different people in different ways. Within this setting each case corresponded to a single individual who moved between

schools within their school board.

The model development followed an initial examination of themes that corresponded to concepts in the academic literature (Sibbald, 2017b) and two additional concepts that were required to achieve theoretical saturation (Sibbald, 2017a). The result of that phase of the research was the contextualized identification of 15 concepts that are potentially relevant to the development of an explanatory model. Using the concepts as a starting point, an initial examination considered whether concepts could be used on an individual basis. Subsequently, the interconnections between concepts were examined as potential pathways. Finally, by examining the sequence of events and their associated concepts, and by developing chronological themes, an explanatory model was developed. The chronological themes go beyond the chronology of policy because they use contextual interpretation to determine the ramifications of the enactment of the policy. The model that emerged is a contextualized understanding of the process that has led to 15 concepts being identified.

The methodology used for contextualizing concepts and examining theoretical saturation is briefly described, with details provided by Sibbald (2017a; 2017b). It was recognized that teacher movements within school boards are typically determined in the Spring months through a process detailed within the collective agreement that individual school boards have with their teacher unions. There is an alternative movement date that can arise at the end of January, but it is a much smaller collection of teachers and specific to schools that use a semester system. Other transfer dates are less common and were not observed in this study. It was necessary that teachers knew that they would be transferring between schools. However, it was also recognized that this knowledge and the process of transferring could impact each teacher's articulation of contextual details (Perren, Keller, Passardi, & Scholz, 2010). A particular concern was that individual perceptions might be impacted by the distinction between a forced move and a chosen move.

The methodological issue of individual perception was mitigated using a triad of interviews, with the first being at each teachers' initial school as early in the process as possible, the second shortly after the teacher had moved to the destination school, and a final interview a period of time after having worked at the destination school. This structure of interviews, the different contextual circumstances, and the need to understand each situation in terms of its unique character creates a case for each individual. The interview questions looked for evidence of the concepts derived from the research literature, but in a manner that was open ended and facilitated dialogue about the meaning of each concept and contextual details that were relevant. Open coding and the constant comparative method (Creswell, 2007; Merriam, 1998) were used to identify themes. This was followed by axial coding that examined the consistency between emergent themes and concepts identified in the literature (Pole, 2007). Care was taken to balance the interpretation of consistency with the need to construct new themes. The result was contextual support for 13 concepts in the literature and the identification of two additional concepts (stress and policy considerations) that were needed to achieve theoretical saturation (Sibbald, 2017a).

The identified concepts, along with their contextual details, were subsequently examined in terms of the policy process. In particular, the chronology of events allowed the development of sequences of conceptual themes and consideration of the ordering of conceptual events. The emergence of chronological themes facilitated the development of an explanatory model.

Participants

This study focused on seven teachers from five different school boards in Ontario, Canada. Each of the teachers was a case study and collectively they were a multiple case study. Participants responded to a small advertisement in a union publication that was distributed across the province. In this jurisdiction, teaching has a self-governing professional body, and all seven teachers were

members of the Ontario College of Teachers. Five of the teachers identified themselves as urban and two as rural. Each teacher was interviewed three times, with six interviews in person, 12 by phone, and three using Skype. In all but one case, interviews were recorded, and in all cases, field notes were created. In 17 instances, member checks were completed.

Five of the teachers were female and two male. They taught nine different subjects and had between 3.5 and 21 years of experience, with an average of 10.6 years. Six of the teachers were permanent teachers and one was seeking a permanent position. One permanent teacher was part-time and the rest were full-time. Four of the teachers chose to move between schools and three were obliged to do so. The permanent part-time teacher was obliged to move, while the non-permanent teacher chose to move schools.

Results

The themes that emerged from interviews achieved theoretical saturation (Sibbald, 2017a) and were concordant with concepts identified as relevant to teacher movement within school boards. However, they appeared of limited value in terms of developing an explanatory model of the process. As an example, all of the teachers spoke of professional success in one regard or another: “I just wanted to further my experience and be in another school and also for the money, I guess.” Teachers who chose to move spoke of more options (“potential for other avenues”), higher personal satisfaction (“...my level of personal satisfaction was good, very good, higher than the last few years at [old school], but not necessarily higher than ever before in my career.”), avoiding a school closure (“I am very confident that I made a very good decision. The previous school could be closing.”); while teachers who were obliged to move spoke of a “dream job” and being “invigorated” by teaching new subjects. The difficulty for theoretical development was that all of the teachers found some form of professional success, and the issue of whether they were seeking it or simply looking on the bright side of a new opportunity was not clear, in spite of the triad of interviews.

Connections between conceptual themes were also limited. For example, leadership issues were mentioned in relation to policies (“I like the opportunity to be a leader and at least have a position of vested authority.”) and personal life impact (“[Rapport with principal is a] better connection [that] accounts for some peace of mind.”). A particular connection to policies was a failure of the leadership at one school to mention localized interpretations of board policies. This led to the teacher having a difficult transition, as she felt undermined by the leadership of the new school, until they clarified their interpretation of the policies. The connection to personal life arose in the interview of a teacher who moved to a school with a principal who was an excellent motivator. The concern was raised that the principal was leading teachers to have issues with work-life balance

because you are around a bunch of people who are wanting to be excellent then, and you have a principal who is a motivator, your productivity certainly increases. It is to the point that I would argue that this school has a very very very poor work life balance.

In both cases, the connection between concepts was entrenched in contextual details that would not apply generally.

The difficulties of examining linkages between themes led to the supposition that they may be connected, but are only rarely causal. There are instances of causal connections, but they are individual and not definitive when the collective experience of all the participants is considered. An example is the relationship between building issues, which includes technology, and the teacher match to the school. One teacher acknowledged the move resulted in having less technology and that this was not by choice, but was beneficial because, prior to moving, the teacher had not been tailoring lesson planning to the students because of easy access to digital materials the teacher had used the previous year.

I think I was relying too much on technology to keep me organized. That the Smart Board files, the SmartBoard itself, just the use of technology created a sense of a system of organization, whereas it was removed from myself as a teacher. Whereas now I am going back to what I think made me a better teacher in the beginning.

Contrary to this, another teacher spoke of the benefits of increased technology access when she moved between schools. She felt it had a positive impact on her classroom instruction (“The SmartBoard [at new school] has made my life a lot easier. Very easy to teach, my lessons are on there and the kids can follow along easily....”), and that access to files was providing professional development that supported her early career.

In light of the difficulties finding theoretical linkages between themes, the chronology of events was considered. The chronology was established through the collective agreements between teachers and school boards. The contractual considerations are structural aspects of the process and are roughly the same across Ontario. Leadership opportunities are posted first, followed by two rounds of internal transfers, the placement of any unresolved surplus teachers (i.e., they have a position, just not at the school where they were located the previous year), and finally, offerings of contractual positions and new hires.

The first stage of internal transfers generally has the widest range of positions, and some experienced teachers are likely, at this stage, to pursue the roles they deem attractive. Furthermore, teachers with greater experience are more likely than less experienced teachers to take transfer vacancies if they apply (Levin & Quinn, 2003, as cited in Loubert & Nelson, 2010). It should be noted that experienced teachers who are unsuccessful in the transfer process would not be observed within most studies because they ultimately do not transfer. They may pursue an attractive vacancy, but if they are not successful, have no obligation to actually transfer and, for that reason, are likely to simply return to the role they were filling.

There is a second important chronology related to career stage that is also relevant. This has to do with clarifying what makes a transfer attractive. For many teachers, their career starts after they complete their formal education. At this stage, many are young and not financially established. They arrive in a contract position at the low end of the teacher pay scale and will live where they can afford based on that salary. Clearly there are exceptions, but what is important is the general milieu. Contrast this to established teachers with a decade of experience, who may have an established family, are financially established, and are close to, if not at, the top of the pay scale. The key distinctions being made are that the early career-stage milieu is less experienced and less affluent.

In the chronology of the transfer process, only experienced teachers credibly vie for leadership positions. The only impact of this stage is the potential vacating of some teacher positions. Additional vacancies may arise from teachers retiring, moving between boards, or leaving the profession. This provides a list of potential positions for the first round of internal transfers.

Applicants for positions in the first round can reasonably be assumed to vary in terms of experience. Those who are novice teachers are more likely to seek any position that will improve their situation (“...I just take whatever job I can get.”), while experienced teachers are likely to exercise their seniority by virtue of the choice of whether to apply to move or not, and that will depend on whether a position is better for them personally.

Round one came out and I, just for fun, looked at what was available. I wasn't looking, I know for sure, I was not actively looking for a place to go, but I saw [name of new school] and I know that it sparked my interest because, from our family aspect, we live South West of the city my school is on the East end [the new school] is on the North end. And, to the North, is the area we want to move to.

The personal benefit can derive from many of the concepts that have been identified as relevant to teacher movements. Teachers may, for example, seek a position that moves them closer to

relatives (“...is an important area for me because that is the direction toward my parents who are getting up in age.”), birthplace, or where they went to school—provided this can be done with a move within the school board. Regardless of the benefit teachers are seeking, when a novice teacher and one or more experienced teachers vie for a position, the experienced teacher is more likely to attain the position.

A personal benefit arises in the desire to reduce commuting time (“...shorter commute to work. I still live out of district, so I am not tripping over students, but it is a far easier and shorter commute.”) and costs associated with travel from home to work and back (“expensive commute”). When a novice teacher establishes his or her circumstance, it is generally with a less affluent budget than that of an experienced teacher. This suggests that teachers gaining experience coincides with changes in personal affluence. The passage of time may also see a teacher’s family grow, with consideration being given to using the improved affluence to change his or her living circumstance. This makes it increasingly likely that a more affluent teacher will seek a transfer to a school associated with the more affluent community he or she has moved to, simply to reduce personal travel costs and travel time.

It is not being suggested that teachers move because they have increased affluence; it is simply being claimed that the increased affluence affords teachers the ability to pursue an opportunity when it becomes desirable to move. The observations in this study suggest that the primary antecedent conditions for experienced teachers wanting to transfer were related to working conditions (“And now I have the experience that I am working with very passionate, enthusiastic people who are really cutting edge in terms of most things that go on in the classroom.”), personal life (shorter commutes, for example), and fatigue arising from prolonged responsiveness to higher levels of student needs in lower socio-economic schools (“fatigue factor” ranked as primary reason for moving). It was noted that the interviewed teachers felt they were better appreciated by students in lower socio-economic schools because students perceived the teachers to be making a difference in their employment prospects after high school, whereas students in higher socio-economic community schools perceived teachers as more of a stepping stone to higher education (“...and it is that sense of community that is important [at the lower socio-economic school], whereas now [at a higher socio-economic school] it is ‘Am I over 65 percent?’ It is ‘What school can I get into next?’”).

In the second round of transfers, there are fewer positions that are attractive to experienced teachers (“... I knew I better darn well get a job in the first round or I might get screwed.”) because they are less likely to emerge from the jockeying of positions that arises from the first round. The second round will therefore provide more opportunity for less experienced and novice teachers to fill positions. This was articulated by the part-time teacher who, in spite of having a permanent contract, was deemed surplus because of her part-time status: “She was very clear, do not say ‘no.’ If they offer you a choice, choose one, and if they just offer you one, do not say no [because it will be considered a resignation].” However, the important detail is that, regardless of the round, less experienced and novice teachers are typically filling positions that are less desirable to experienced teachers out of necessity. The less experienced and novice teachers are content with the stability that a position provides, and the position is amenable to their lower degree of affluence.

Subsequent placements of teachers are typically of diminished benefit to permanent full-time teachers. The positions include, for example, contractual positions of fixed duration or part-time positions. These will be of little interest to experienced teachers, but may be pursued by novice teachers who can improve their standing toward a future full-time position.

Discussion

The explanatory model that resulted from this study is consistent with the contextual observa-

tions of the teachers involved. The 15 concepts derived from the literature and the achievement of theoretical saturation (Sibbald, 2017a) were observed in this study. However, none of them were found to account for the process as a whole, nor were interactions between the themes found to clarify the process. Many of the themes were of limited scope, and the lack of a clear model was indicative of the need to consider the chronology of events.

It was the adoption of a two-fold chronology that includes the short-term process of transfers and the long-term career position that led to an explanation of how the many concepts could arise in a coherent fashion. For example, the notion that experienced teachers are the most likely to obtain positions of their choosing (Feng & Sass, 2011) makes their vision of the “attractiveness” of a position arise through other concepts that can be called on to assess personal benefits. Considering that experienced teachers are likely to only pursue a constrained set of roles they deem attractive, is consistent with most movers being younger (Smithers & Robinson, 2005). It is also consistent with the finding that teachers with high qualifications tend to stay put (Goldhaber et al., 2007)—only a few who pursue attractive positions succeed. Beyond this there seem to be many spurious correlates that are not explanatory, but happen to correspond to transfers that are made. In particular, observations of “a small but distinct tendency to trade upward” (Smithers & Robinson, 2005, p. 49) may simply be a bias arising from a correlation between school performance and community affluence. Similarly, connections to cultural elements were not evident in the small sample from Ontario, where multiculturalism is well established.

To draw an exemplary picture, consider a family with a child who succeeds in university and qualifies as a professional teacher. The child, as a novice teacher, may seek a position in the local school board because of his or her familiarity with it (Reininger, 2012). However, in the year that the child succeeds in gaining a permanent teaching position, the transfer of experienced teachers diminishes the opportunities in neighbourhoods that more experienced teachers can afford to live in (Hanson & Pratt, 1988) or, to put it another way, neighbourhoods with a “smaller proportion of low-income families” (Feng & Sass, 2011). So, the novice teacher settles into a less affluent school, which suits his or her life situation because living accommodations are affordable, and there is the possibility of beginning a family (Smithers & Robinson, 2005). As the years pass, the teacher, along with his or her spouse, achieves more affluence. They move their home to a more affluent area of the community (Hanson & Pratt, 1988), possibly motivated by personal reasons (Keigher, 2010), like having their own children attend a better school (Hansen, 2014). The move may be closer to their parents and where they grew up, simply because both are often in the same school district (Reininger, 2012; Denzler & Wolter, 2009), and university graduation is indicative of the parents having higher socio-economic standing.

After many years teaching at his or her initial school, the teacher may feel professionally fatigued from the relatively demanding nature of attending classes and peripherally addressing social issues that are more prominent among students in lower-affluence schools. The view is consistent with Lankford et al. (2002), who hypothesized that “more qualified teachers seize opportunities to leave difficult working conditions and move to more appealing environments” (p. 55). This view is somewhat unpalatable (and credibly unconscious), and that may lead to more palatable alternative explanations being given. For example, numerous other correlates—stress, working conditions, school leadership, and building issues—may emerge as the way the teacher explains the desire to move. This view is consistent with Horng (2009) pointing to moves being consequences of the environment, rather than particular students, and Lassig, Doherty, and Moore (2015) finding teachers conflicted between their sense of duty and parenting decisions. The opportunity to move is further precipitated if an option to reduce travel time and cost becomes available (Hanson & Pratt, 1988). The travel time and associated cost may have originated in the context of the personal move to a more affluent neighbourhood, as they were affordable because of salary increments. Since the teacher lives in a more affluent neighbourhood, moving

schools to reduce travel time coincides with transferring to a school in a higher socio-economic community.

Further to the scenario, for the individual teacher, his or her original teaching position becomes available in the second round (having secured a new position in the first round based on experience). This makes the position available for the school board to assign to surplus teachers, if the teacher did not compete successfully for a position, or it could be allocated to a novice teacher. For both surplus and novice teachers, their moves can incur additional expense, simply because the process has diminished choice at this stage. However, this is not necessarily the case with novice teachers who may not be settled and can choose where they live. Any additional cost may be outweighed by the potential for career improvement toward full-time permanent employment (Smithers & Robinson, 2005).

Though the model does not speak directly to professional success, the findings suggest that experienced teachers who fulfill a choice to move, and novice teachers who improve their situation, will deem to have had some degree of professional success. This, along with simple novelty value of changing circumstance, accounts for the findings of Thorton et al. (2008), and why teacher effectiveness increases (Jackson, 2013). It also accounts for a disconnect between teacher quality and teacher movement (Feng & Sass, 2011; Goldhaber, Lavery, & Theobald, 2016)—affluence of teachers will be related to whether they are in a two-income situation and their longevity in teaching, both of which are not necessarily reflective of teacher quality. To the extent that experienced teachers successfully move, a connection to quality is likely diminished by the number of novice and surplus teachers who also move.

It is important to note that this explanatory model is not proposed to be exclusive of other models (such as late hiring effects noted by Engel and Finch (2015) and Papay and Kraft (2016)). Rather, it is considered to be a model that explains all the teachers observed in the present study. It is concordant with the numerous concepts that arise in the literature, which suggests that it has much wider applicability. For example, the use of financial incentives would only impact the process in terms of its value weighed against the additional cost and time taken to travel to the school. It would be challenged by personal fatigue from a long-term role in a low socio-economic school; however, if the position were high enough, it might entice other experienced teachers to move into the situation (Guarino et al., 2011). In this light, the theory suggests the results will depend on the incentive amount (as noted by Fulbeck, 2014). This is concordant with lucrative incentives reported by Blazer (2006), and the issue of personal fatigue is consistent with incentives decreasing the number of teachers leaving teaching from lower socio-economic schools (Fulbeck, 2014).

The theory requires interpretation in complex scenarios. For example, in large urban centres with efficient transit, it may be practical for teachers to live and work in neighbourhoods with different socio-economic standings. In addition, there may be varying lifestyle choices, such as those offered by inner urban, suburban, and rural locations, that influence the direction of moves (Boyd et al., 2005; Smithers & Robinson, 2005). These aspects are affiliated with lifestyle choices, but are not necessarily unidirectional because of variations in the choices affluence brings. Related to this, Hanson and Pratt (1988), point to whether there is one income or two, and when there are two incomes, whether the teacher happens to have more mobility options than the career associated with the other income.

Conclusion

Establishing an explanatory model when there is a considerable research base with many existing models is challenging. There is a need for a new model to have a degree of concordance with existing models, while providing some originality. In the present model, the originality arises from the consideration of different time scales. First, it recognizes the timing effects arising

from the contractual process that regulates teacher movement. Second, it considers personal changes on the scale of many years that reflect a large portion of a full career. This latter consideration impacts the motivation for moving, while the shorter time scale dictates what options are available. The strength of this explanatory model is that it is based on the interaction of the two processes and not on any particular concept or collection of concepts. This strength suggests that further study of process effects for much larger samples should be investigated.

Limitations

The findings in this study are based on Ontario, Canada, and on commonalities in the staffing timelines embedded in collective agreements with the associated school boards. These do not necessarily generalize. Loubert and Nelson (2010) have noted variations in collective agreements when one looks at the United States specifically, and Goldhaber et al. (2016) suggest the impact of seniority in collective agreements varies. However, the limitation is based on whether policies have been enacted to impact the chronology of events or teacher options to move within the school board. It is believed that the substantive theory is applicable widely, though not everywhere.

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