

Student Work

---

10-1-1999

## A Comparative Study of the Morale Levels of Lower and Upper Elementary Public School Teachers

Marcellina Hummer Anderson  
*University of Nebraska at Omaha*

Follow this and additional works at: <https://digitalcommons.unomaha.edu/studentwork>

 Part of the [Education Commons](#)

Please take our feedback survey at: [https://unomaha.az1.qualtrics.com/jfe/form/SV\\_8cchtFmpDyGfBLE](https://unomaha.az1.qualtrics.com/jfe/form/SV_8cchtFmpDyGfBLE)

---

### Recommended Citation

Anderson, Marcellina Hummer, "A Comparative Study of the Morale Levels of Lower and Upper Elementary Public School Teachers" (1999). *Student Work*. 3706.  
<https://digitalcommons.unomaha.edu/studentwork/3706>

This Dissertation is brought to you for free and open access by DigitalCommons@UNO. It has been accepted for inclusion in Student Work by an authorized administrator of DigitalCommons@UNO. For more information, please contact [unodigitalcommons@unomaha.edu](mailto:unodigitalcommons@unomaha.edu).

## INFORMATION TO USERS

This manuscript has been reproduced from the microfilm master. UMI films the text directly from the original or copy submitted. Thus, some thesis and dissertation copies are in typewriter face, while others may be from any type of computer printer.

**The quality of this reproduction is dependent upon the quality of the copy submitted.** Broken or indistinct print, colored or poor quality illustrations and photographs, print bleedthrough, substandard margins, and improper alignment can adversely affect reproduction.

In the unlikely event that the author did not send UMI a complete manuscript and there are missing pages, these will be noted. Also, if unauthorized copyright material had to be removed, a note will indicate the deletion.

Oversize materials (e.g., maps, drawings, charts) are reproduced by sectioning the original, beginning at the upper left-hand corner and continuing from left to right in equal sections with small overlaps.

Photographs included in the original manuscript have been reproduced xerographically in this copy. Higher quality 6" x 9" black and white photographic prints are available for any photographs or illustrations appearing in this copy for an additional charge. Contact UMI directly to order.

Bell & Howell Information and Learning  
300 North Zeeb Road, Ann Arbor, MI 48106-1346 USA

**UMI**<sup>®</sup>  
800-521-0600



A COMPARATIVE STUDY OF THE MORALE LEVELS OF  
LOWER AND UPPER ELEMENTARY PUBLIC  
SCHOOL TEACHERS

by

Marcellina Hummer Anderson

A DISSERTATION

Presented to the Faculty of

The Graduate College at the University of Nebraska

In Partial Fulfillment of Requirements

For the Degree of Doctor of Education

Major: Educational Administration

Under the Supervision of Dr. Daniel U. Levine

Omaha, Nebraska

October, 1999

UMI Number: 9951401

Copyright 2000 by  
Anderson, Marcellina Hummer

All rights reserved.

UMI<sup>®</sup>

---

UMI Microform 9951401

Copyright 2000 by Bell & Howell Information and Learning Company.  
All rights reserved. This microform edition is protected against  
unauthorized copying under Title 17, United States Code.

---

Bell & Howell Information and Learning Company  
300 North Zeeb Road  
P.O. Box 1346  
Ann Arbor, MI 48106-1346

DISSERTATION TITLE

A Comparative Study of the Morale Levels of

Lower and Upper Elementary Public School Teachers

BY

Marcellina Anderson

SUPERVISORY COMMITTEE:

APPROVED

DATE

*Daniel U. Levine*  
Signature

*11/3/99*

Dr. Daniel U. Levine

Typed Name

*Marilyn Grady*  
Signature

*10/21/99*

Dr. Marilyn Grady

Typed Name

*Neal Grandgenett*  
Signature

*11/4/99*

Dr. Neal Grandgenett

Typed Name

*Gary Hartzell*  
Signature

*10/21/99*

Dr. Gary Hartzell

Typed Name

Signature

Typed Name

Signature

Typed Name



A COMPARATIVE STUDY OF THE MORALE LEVELS  
OF LOWER AND UPPER ELEMENTARY  
PUBLIC SCHOOL TEACHERS

Marcellina Hummer Anderson,

University of Nebraska at Omaha, 1999

Advisor: Dr. Daniel U. Levine

This study involved the development of a new instrument, the Teacher Outlook and Perceptions Survey, to explore the nature of teacher morale, what predicts teacher morale, and the influence of the anticipated outlook of the job situation on teacher morale. The instrument consisted of 47 items, including a global item in which teachers assessed their morale levels. The scores of the instrument produced an alpha reliability coefficient of .91. Elementary teachers from a large urban district participated in the study ( $N = 308$ ). The instrument was based on a morale model developed by the researcher. Morale was defined as a psychological state which stems from the interaction of job-related fulfillment of needs, anticipated fulfillment of needs, and perceived obstacles to needs fulfillment.

Comparison of the morale levels of lower and upper elementary teachers was conducted, using  $t$ -tests. No statistically significant or substantive difference between the two groups was evident. These findings were inconsistent with a pilot study ( $N=95$ ) which found a statistically significant and substantive difference between the morale levels of lower and upper elementary teachers ( $p = .02$ ,  $d = .65$ ). Factor analysis produced five factors through which reliability scales ( $\alpha > .60$ ) were developed. The five factors were labeled "Administrative Issues," "Student and

Classroom Experiences,” “Workload and Demands,” “Anticipated Outlook of the Job Situation,” and “Teacher Autonomy and Influence.” Two additional factors were included in the analysis, “Conflict,” and “Peer Support.”

Anticipated Outlook of the Job Situation was determined to be a reliable predictor of overall teacher morale. Student and Classroom Experiences was found to be a stronger independent predictor of teacher morale than Administrative Issues. Administrative Issues was a reliable predictor of lower elementary teachers’ morale levels, but not a reliable predictor of upper elementary teachers’ morale levels when taking into account the other factors. Using discriminant analysis, five items on the instrument were able to correctly predict classification of low morale teachers with 82% accuracy. Teachers tend to believe that their own morale level is higher than that of their peers.



## ACKNOWLEDGEMENTS

I would like to express my deepest thanks to Dan Levine, whose encouragement, guidance, and expertise have been most valuable. It has been an honor to work with him. Thanks also to Gary Hartzell, for his immense insight and assistance throughout the stages of this project. I must also thank Neal Grandgenett and Marilyn Grady for the time and input they have offered.

Most of all, I must thank my family for their encouragement, patience, and understanding. To my mother, Virginia, for the inspiration she has provided, my husband, Robert for the loving support and assistance he has given, and my children, Amy, Justin, and Jeremy, for bringing a great deal of joy to my life.

## TABLE OF CONTENTS

Abstract	ii
Acknowledgements	iv
List of Tables	viii
List of Figures	x
Introduction	1
Purpose of the study	2
Need for the study	4
Conceptual references	5
Research problem	6
Research questions	8
Significance of the study	9
Literature Review	11
The importance of morale	11
The nature of morale	14
Definitions	14
Models of group-defined morale	18
Models of individual morale	21
The avoidance of morale in favor of other terms	22
Job satisfaction	23
Burnout	26
Stress	27
Morale and disposition	28
Morale and productivity	29
Morale models' application to human needs theory	30
Development in needs theory	31
Autonomy	31
Competence	32
Relatedness	32
Power	33
Recognition	33
Security	34
Growth	34
Needs as they apply to teacher morale	36
Autonomy and teachers	36
Competence and teachers	37
Relatedness and teachers	38
Power and teachers	40
Recognition and teaching	42
Security and teaching	43
Growth and teaching	44

Anticipated fulfillment of needs	45
Obstacles to needs fulfillment	46
Variables specific to teaching	47
Basic support and materials for teachers	47
The influence of morale on teachers and teaching	48
Comparative studies	51
Morale and productivity in the classroom	52
Instruments used to define, measure, and assess teacher morale	53
Organizational climate subscales	53
The Staff Morale Questionnaire	54
The Purdue Teacher Opinionnaire	58
Implications for study	64
Design and Methodology	66
Pilot study	66
Subjects	67
Instrument	67
Collection of data	69
Data analysis	69
Results	70
Present study	71
Subjects	71
Instrument	71
Procedures for data collection	72
Treatment of data	73
Analysis and Results	75
Subjects	75
Overall teacher morale	76
Factor analysis	78
Research question one	91
Research question two	96
Research question three	97
Research question four	99
Fifth grade contrasts	105
Predicting classification of low morale	109
Teacher morale and effective school correlates	112
Teacher success	112
Order	112
The administrator as a “buffer”	113
The relationship between SES and teacher morale	115
Age of teachers, morale, and the myth of the disgruntled teacher	118
The appropriateness of the human needs model in studying morale	120
Assessment of colleagues’ morale levels	124
Summary and Conclusions	127
Development of the instrument	127
Strengths and uses for the instrument	129

Recommendations for the instrument	131
The study of teacher morale using the Teacher Outlook and Perceptions Survey	132
Additional considerations	138
Avoidance of misinterpretation	139
Problems encountered in the study	141
Implications for future research	142
Implications and conclusions	147
References	150
Appendixes	
Appendix A - Morale Model	159
Appendix B - Survey cover letter	161
Appendix C - Teacher morale survey used in the pilot study	163
Appendix D - Pilot study results	168
Appendix E - Teacher Outlook and Perceptions Survey	172
Appendix F - Factor analysis results for factors 8-10	177
Appendix G - Alpha reliability results for the Teacher Outlook and Perceptions Survey	179
Appendix H - District participation approval letter	183
Appendix I - IRB approval letter	185

## List of Tables

Table 1 – Demographic Background of Respondents	76
Table 2 – Collapsed Distribution of Responses to the Item “My overall level of morale is high.”	77
Table 3 – Factor Analysis and ANOVA Results of Lowest and Highest Morale Group Differences for the Administrative Issues Factor and Items	80
Table 4 - Factor Analysis and ANOVA Results of Lowest and Highest Morale Group Differences for the Student and Classroom Experiences Factor and Items	82
Table 5 - Factor Analysis and ANOVA Results of Lowest and Highest Morale Group Differences for the Workload and Demands Factor and Items	84
Table 6 - Factor Analysis and ANOVA Results of Lowest and Highest Morale Group Differences for Anticipated Outlook of the Job Situation Factor and Items	86
Table 7 - Factor Analysis and ANOVA Results of Lowest and Highest Morale Group Differences for Teacher Autonomy and Influence Factor and Items	87
Table 8 - Factor Analysis and ANOVA Results of Lowest and Highest Morale Group Differences for the Conflict Factor and Items	88
Table 9 - Factor Analysis and ANOVA Results of Lowest and Highest Morale Group Differences for the Peer Support Factor and Items	89
Table 10 – ANOVA Results of Differences in Low and High Morale Group Means for Factors 1-7	90
Table 11 – Regression Analysis Using Seven Factors as Predictors of Overall Morale	93
Table 12 – Multiple Regression Substituting Item 20 for Factor 4	94
Table 13 – Anticipated Outlook of the Job Situation Factor Items Used as Predictors of Overall Morale	95
Table 14 – Overall Morale Means by Grade Level	97
Table 15 – Regression Analysis Using Administrative Issues and Student and Classroom Experiences as Predictors of Overall Morale	99
Table 16 – Comparison of Lower and Upper Elementary Multiple Regression Analyses Using Student and Classroom Experiences Factor Items as Predictors of Overall Morale	100
Table 17 – Comparison of Multiple Regression Analyses Using Factors 1-7 as Predictors of Overall Morale for Lower and Upper Elementary Teachers	102
Table 18 – T-test Results for Lower and Upper Elementary Teachers Factor Scores on Student and Classroom Experiences Factor	103

Table 19 – Comparisons of Lower and Upper Elementary Means on Selected Student and Classroom Experiences Factor Items	104
Table 20 – Comparison of Lower and Upper Elementary Means on Selected Items not Included on the Student and Classroom Experiences Factor	105
Table 21 – Contrasts of Fifth Grade Teachers’ Responses to Teacher Outlook and Perceptions Survey Items Compared to Other Grade Levels	106
Table 22 – Discriminant Analysis Using Factors One Through Seven to Classify Low Morale and High Morale	110
Table 23 – Discriminant Analysis Using Specific Items to Classify Low and High Morale	111
Table 24 – ANOVA Results of Differences in Low and the Second Highest Morale Groups for the Buffer Variable	114
Table 25 – T-test Results Comparing Overall Morale Means by Buffer	125
Table 26 – Comparison of Multiple Regression Analyses Using Six Factors and District SES Data with Six Factors and SES Data as Estimated by Lifelong Resident	117
Table 27 – Scales developed from Items Connected to Specific Human Needs	122
Table 28 – Comparison of Overall Morale and Colleagues’ Morale Predictors Using Multiple Regression Analyses	125

## List of Figures

Figure 1 – Grade Level Response Means to the Item “My students are generally friendly and pleasant to interact with.”	107
Figure 2 – Grade Level Response Means to the Item “The administration at my building adheres strictly to discipline policies and procedures.	108
Figure 3 – Grade Level Response Means to the Item “I enjoy teaching my students.”	108
Figure 4 – Comparison of Respondents’ Self-Assessed Morale Levels Compared to Their Assessment of Colleagues’ Overall Morale Level – Pilot Study	126
Figure 5 – Comparison of Respondents’ Self-Assessed Morale Levels Compared to Their Assessment of Colleagues’ Overall Morale Level – Present Study	126

## CHAPTER ONE

### INTRODUCTION

Morale is a murky concept, albeit an important one. Despite decades of research on the topic, there is little agreement about its conceptual framework. No universally accepted model of morale exists. Considering the strong disagreement over definitions of morale and the uncertainty of terminology, it is surprising that it has been so widely accepted as a vital component of personnel considerations in organizations.

For decades, organizations have conducted morale surveys seeking ways to improve employee performance behaviors. Varying levels of employee morale have been associated with turnover, absenteeism, and job commitment (Brayfield & Crockett, 1978; Bruno, 1983; Fraser, 1993; Ross & Zander, 1978). Levels of morale have also been weakly associated levels of productivity (Briggs & Richardson, 1992; Unruh & Turner, 1970).

Teacher morale became a topic of heightened interest during the 1970's and 1980's. Concerns about teacher burnout and turnover brought studies of the subject into the forefront. Teacher morale is an important element of organizational climate (Hoy, Tarter, & Kottkamp, 1991). Similar to employee morale in industry, teacher morale is related to important elements necessary for organizational stability and growth, including teacher retention, teacher absenteeism (Farber, 1991; Reyes, 1990), and student achievement (Zigarelli, 1996). More recently, teacher morale research has



been cast aside in favor of seemingly more concrete constructs, such as job satisfaction. However, the concept of morale does not have to be vague, and may be a better indicator of commitment than is job satisfaction (Doherty, 1988).

### Purposes of the Study

This study had several purposes. A primary purpose of this study was the development and validation of an instrument to measure teacher morale. The instrument was based partially upon the previously validated Purdue Teacher Opinionnaire (Bentley & Rempel, 1970) and partially upon items recently developed and used by this researcher in a pilot study. Items adhered to the morale construct described by Guion (1958), Doherty (1988), and Evans (1992). Morale was examined with respect to both group and individual needs. It was defined as a psychological state stemming from the interaction of (1) job-associated fulfillment of needs, (2) anticipated fulfillment of needs, and (3) perceived obstacles to needs fulfillment. The morale model developed for the study is shown in Appendix A.

There are several reasons why the examination of individual needs in reference to morale is particularly germane to the teaching profession for several reasons. First, most teachers are isolated in their classrooms. For the most part, they do not perform their jobs as a group (Reyes, 1990). Second, school organizations pursue myriad goals within any school organization: e.g., individual classroom goals, department or grade level goals, and district objectives. Exclusive reference to goals as defined in terms of

groups is myopic. Third, teachers' primary work role is the instruction of students (NCES, 1997). It is faulty to emphasize the group composed of faculty when analyzing morale. The reality is that the teacher spends the bulk of the day interacting as a part of a group composed of herself and her students, not as a group of interacting adults.

A second purpose of this study was to determine the relationship between the grade level at which a teacher works and his or her morale level. Earlier studies on job satisfaction (NCES, 1997) and morale (Fraser, 1990) have found that assigned grade level is related to a given teacher's job satisfaction and morale level. However, these studies have not specifically examined differences between teachers working within primary and upper elementary grades, respectively.

A third purpose of this study was to gain insight into what teachers see for the future of education and the impact of that vision on their morale. Anticipated fulfillment of human needs involves expectancy theory (Vroom, 1964). If changes in a district are foreseen as decreasing or increasing instrumentality and/or affectivity, a teacher's motivation is likely to change. This change in motivation is also highly likely if the valence of the rewards related to the job is expected to change. Inclusion of the factor examining anticipation of human needs also reflects a recognition that morale is dynamic.

### Need for the Study

Demographic variables have been shown to influence teacher morale levels. These variables include sex, years of experience, age, school district size, and grade level taught (Smith, 1987). Despite research that strongly suggests differences exist in the morale levels of teachers working with different grade levels, no studies have specifically examined differences in the morale levels of lower and upper elementary teachers. Comparative studies using grade level assignment as a variable nearly always group elementary teachers together; while secondary teachers are generally grouped into two categories: middle or junior high level and high school level.

A 1997 study by the National Center on Educational Statistics (NCES) finds that lower and upper elementary teachers experience different levels of job satisfaction. No studies have attempted to assess whether similar differences exist between the two groups' morale levels. Previous studies have failed to consider the large range of students' developmental levels in the elementary school and its possible impact on teacher morale. Instead, studies have tended to focus on administrative leadership styles and behaviors, assuming that leadership is the most critical predictor of teacher morale.

Previous researchers' emphases on the leader's role in teacher morale may be attributed to the two most widely used teacher morale instruments, the Purdue Teacher Opinionnaire (PTO)(Bentley & Rempel, 1970) and the Staff Morale Questionnaire (Smith, 1971). Both instruments place heavy emphasis on leadership and tend to

diminish the influence of student variables on teacher morale through omission of student-related items in their surveys. In order to maintain a balance between student, administrative, and other school-related variables, a new instrument was developed.

### Conceptual References

In order to clarify terms that are related to or interchanged with morale, it is essential to address the following terms:

Morale. In this study, morale is referred to as a psychological state stemming from the interaction of an individual's job-related fulfillment of needs, anticipated fulfillment of needs, and perceived obstacles to needs fulfillment. This specific definition has not previously been used in research, but is clearly consistent with the morale construct developed by morale researchers (Doherty, 1988; Evans, 1997; Guion, 1958).

Job satisfaction. Job satisfaction is referred to as the extent to which rewards actually received meet or exceed the perceived equitable level of rewards (Porter & Lawler, 1968). Job satisfaction stems from external conditions. The employee considers what is being received in relation to what he or she perceives is deserved, not necessarily needed. In addition, the definition of job satisfaction, and numerous surveys measuring job satisfaction suggest that equity plays an important role in job satisfaction.

When examining both job satisfaction and morale, it is important to understand that it is possible for an employee to be highly satisfied with a job, but still possess low morale because he or she anticipates a downturn in the future of the job (Kanter, 1977).

Stress. Stress refers to the “pattern of emotional states and physiological reaction occurring in response to demands from inside or outside the organization (i.e., stressors)” (Greenberg, 1996, p. 325). Stress in this study should not be confused with low morale. It does not necessarily lead to low morale. Even positive events and change for the better can be stressful (Greenberg, 1996).

Burnout. Burnout refers to a condition “in which exhaustion is coupled with feelings of personal inadequacy as a result of prolonged exposure to intense stress” (Greenberg, 1996, p. 325). Burnout may be accompanied by low morale. However, low morale may not necessarily lead to feelings of personal inadequacy. It may lead to other types of work-related conditions, such as high turnover and absenteeism.

### Research Problem

A primary purpose behind research on teacher morale in recent years has been to gain insight into factors that influence the recruitment and retention of teachers who are committed to the organization. Congruent with other trends in educational administration research, previous studies have focused on leadership, assuming that teachers working under effective leaders will possess higher morale.

Reliance on this assumption is problematic, however. Comparative studies including grade level variables unanimously recognize elementary teachers as possessing higher levels of morale than secondary teachers (Bentley & Rempel, 1970; Fraser, 1991). Yet it cannot be assumed that secondary administrators are less effective than elementary administrators based upon the observed relationships. This study examined the influence of additional variables on teacher morale by comparing the morale levels of teachers working in the same building, sharing the same administrator and organizational climate.

Norm scores of the PTO (Bentley & Rempel, 1970) also suggest a difference in the morale levels of elementary, middle/jr. high school, and high school teachers. Due to the PTO's norm grouping, differences between lower and upper elementary teachers' morale have not been identified.

This study probed into the differences between lower and upper elementary teachers' experiences which account for previous findings in job satisfaction differences, and investigated their relation to teacher morale levels.

The Purdue Teacher Opinionnaire (Bentley & Rempel, 1970) and the Staff Morale Questionnaire (Smith, 1971) have helped to provide valuable information about teacher morale during the past three decades. However, the passage of time and the impact of change in the schools suggest that consideration of the future is a critical element that contributes to the level of a teacher's morale. Recent research on the concept of morale indicates that the anticipatory state strongly affects the present state

of morale (Evans, 1992, 1997). This is also supported by motivational theory.

Inclusion of this component should more clearly manifest the morale level of the teacher.

### Research Questions

Given these factors, a new instrument was developed to investigate the following research questions:

1. Is there a statistically significant and substantive relationship between a teacher's anticipation of the job situation and the teacher's level of morale?
2. Is there a statistically significant and substantive relationship between lower and upper elementary teachers' morale levels? If so, what accounts for these differences?
3. Is there a statistically significant and substantive relationship between student-related issues and a teacher's overall morale level? If so, does the student factor predict a teacher's morale level better than predictions based on leadership factors?
4. Are the morale levels of lower and upper elementary teachers influenced differently by student-related factors?

### Significance of the Study

For the past several decades, there has been no consistent concept, definition, or measure of teacher morale. Investigation of teacher morale using an updated instrument will help to provide consistency in the study of teacher morale.

Teacher morale can have a great impact on the stability of a school. It has important implications for student achievement (Zigarelli, 1996). Before an accurate description of teacher morale can be provided, a valid and reliable instrument that measures the true nature of morale had to be devised. Given the out-dated instruments currently used and their questionable foundations, it is critical that a teacher morale instrument be developed from a solid conceptual basis.

Investigation of the association of anticipated fulfillment of needs and student variables helps to broaden the examination of teacher morale variables. Inclusion of survey items pertaining to anticipated fulfillment of needs follows more closely with the elements of a fully developed morale concept and more distinctly separates the morale instrument from a job satisfaction instrument. Inclusion of more student-related items provides an instrument which is more reflective of a teacher's actual work experience and focus.

Although some differences between lower and upper elementary teacher experiences and attitudes have been identified (NCES, 1997), the elements which account for these differences have not been identified. Lower and upper elementary teachers within a building have the same administrator and experience the same climate.



The primary difference between the two groups' teaching experiences most likely lies within the developmental stages of the students and the curriculum used. With this in mind, student-related issues as they apply to varying grade levels are a critical component of the teacher morale study.

## CHAPTER TWO

### LITERATURE REVIEW

#### **Introduction**

##### Relevant Literatures to the Study

The study involves three relevant literatures. They are (1) the literature regarding the general construct of morale, (2) the literature that covers what we know and don't know about teacher morale, and (3) the literature that describes instruments purporting to measure teacher morale. The following review examines all three and draws them together in summary that substantiates justification of the research questions.

##### The Importance of Morale

Considering the fogginess of the term, morale receives a great deal of attention. Programs aimed at boosting morale are common in large organizations. Consultants are hired to provide suggestions for raising morale. These practices often occur with no specific definition or design of morale in mind.

Yet, positive morale has been seen as necessary for internal and external growth to occur (Brown & Henry, 1992; Raschke, 1985; Wong, 1991). Morale is a critical element in the sustenance of professional productivity. Low morale can be costly. It is strongly related to turnover and absenteeism (Brayfield & Crockett, 1978; Bruno,

1983; Fraser, 1993; Ross & Zander, 1978), and there is some suggestion that low morale hampers productivity (Briggs & Richardson, 1992; Unruh & Turner, 1970).

High morale, on the other hand, is associated with job commitment, which saves money on personnel recruitment and training by lowering turnover (Greenberg, 1996). High morale is also associated with specific behaviors in the work place such as organizational citizenship behavior and volunteerism. This may suggest that risk-taking behaviors related to new, innovative programs may also be associated with higher morale.

The portrayal of morale in the popular press suggests shades of a marketable product. Articles such as “50 Ways to Boost Teacher Morale” (Lester, 1990) and “How to Keep an Aging Teacher Alive” (Nicholas, 1989) convey a belief in the need for strong morale. However, articles such as these are often written with little thought as to the meaning of morale other than that it is something that makes workers happy.

Teacher morale levels have been found to be related to student achievement, teacher behaviors, and teacher turnover and absenteeism (Farber, 1991; Greenwood & Soar, 1973; Zigarelli, 1996). These four things are vital parts of the educational process.

Teacher morale has been a topic of extensive study, but there are numerous problems in previous teacher morale research. First, the conceptual basis of morale for most studies is inconsistent. Studies are based on a multitude of definitions of morale. Second, many studies purporting to describe morale actually address issues of job

satisfaction, burnout, and stress. Within the text of these studies, “morale” is simply used interchangeably with these other terms. This practice does not contribute to our understanding of morale, and makes it nearly impossible to generalize conclusions. A third problem lies in the instruments used to measure teacher morale. They were constructed in the 1960s and 1970s. While it is obvious that they are dated, a more significant flaw is that they fail to examine critical components of the teacher’s work, namely students. Finally, they include many issues and items either unimportant or irrelevant to schools in all contexts.

There is a great deal to be gained from the development of a morale model and a new teacher morale instrument. Together they can provide consistency to future research on teacher morale, help administrators understand the concerns and needs of teachers, and assist policymakers when considering school reform and job redesign.

## Morale Construct Literature

### The Nature of Morale

Uncertainty about the nature of morale is evident in the variety of morale definitions. Guion (1958), a pioneer in morale research, notes that “such confusion of concept makes communication collapse and argument inevitable” (p. 60). The primary difference between morale definitions lies in their perspectives of how morale is manifested.

### Definitions

Three fundamental lines of thought prevail in defining morale. The first contends that morale is a group phenomenon. The second views morale as both an individual and group construct. The third recognizes morale as an attitude but makes no reference to whether it emerges from the individual or the group.

Line One. In this line of thinking, the group defines the individual's morale, and that morale is manifested through the group. It is through group reference that morale is defined. Morale as a manifestation of group suggests that morale at the individual level does not exist. For example, Stogdill (1959) contends that morale is one of three group outputs. Cattell and Stice (as cited by Cattell & Child, 1975) also define morale through the group, concluding, as Stogdill does, that it is through group interaction that morale is exhibited. A variation to this line of thought purports that morale

depends on the individual's perception of himself within the group and his goal consistency with the group (Stagner, 1958). The individual's sense of belonging, relating, and contributing to the group determines his morale.

Blum and Naylor (1968) identify the existence of individual attitudes in relation to the group when they refer to morale as "the possession of a feeling, on the part of the employee, of being accepted and belonging to a group of employees through adherence to common goals and confidence in the desirability of these goals" (p.391). A fundamental problem with these approaches is that they fail to address morale in the context of the worker who does not work in a group environment.

Line Two. A second line of thought recognizes the existence of individual morale, although it is still somewhat connected to the individual's role within the group. Through recognition of the existence of individual morale, this perspective in turn gives some recognition to individual needs. Rempel and Bentley (1964) recognized the existence of individual morale; defining it through the person's relationship with the group. In their view, "morale refers to the professional interests and enthusiasm that a person displays toward the achievement of individual and group goals in a given job situation" (p.631). This definition recognizes a distinction between the individual and the group. It is through harmonious interaction of individual and group goals and needs that morale exists. Their research serves as the basis of the Purdue Teacher Opinionnaire, an instrument used to measure morale in teachers.

Some researchers in this group steer away from the connection between group

and individual morale. Guion did leading work in the 1940's and 50's. In order to arrive at a clear concept of morale, he collected numerous definitions and synthesized them to arrive at a general definition. He defines morale as "the extent to which an individual's needs are satisfied and the extent to which the individual perceives that satisfaction as stemming from his total job situation" (1958, p.60). He lists five criteria for a concept of morale:

1. It must recognize the dynamic complexity of morale;
2. It must treat morale as basically an attribute of the individual;
3. It must recognize that morale exists with reference to the job situation;
4. It must recognize the role of motivation in morale;
5. It must be applicable to employees at any job level.

In most respects, Bentley and Rempel's (1970) approach to identifying morale is consistent with Guion's (1958). They focus on individual motivation exhibited by enthusiasm stemming from the job situation. However, their definition assumes harmony between individual and group goals.

Line Three. The third approach to morale considers it as an attitude, but makes no reference to the job situation, the individual, or the group. Chaplin (1979), for example, defines morale as "the attitude or spirit characterized by the presence of confidence, strong motivation to continue, cheerfulness and good organization" (p.324). This definition approaches morale by identifying ways in which it is

demonstrated. It does meet Guion's (1958) criteria in its inclusion of motivation; but it contains no reference to the job situation. It is also similar to Bentley and Rempel's construct (1970) in that it identifies characteristics which can be used to recognize morale.

Disregarding the job altogether, Doherty (1988) describes morale as a psychological state, not as an attitude. It is not a dimension of a personality variable, although many personality variables make contributions to an individual's morale level. Morale is more affective than cognitive.

Synthesis. Although substantial disagreements are evident in researchers' approaches to morale, their definitions of morale tend to share several elements. First, morale is generally described as an attitude, though there is not agreement as to whether the attitude is seated in the individual or group. Second, morale is generally defined through the behaviors or attitudes that it generates. In some cases, it may be demonstrated through adherence to a goal; at other times, through cheerfulness. One can recognize morale through the enthusiasm or energy one exhibits. A third common theme is reference to motivation. The element of motivation precedes an additional commonality. Morale is dynamic. As the valences and expectancies related to motivation change, morale changes. Finally, morale is predominantly considered to be multidimensional (Bentley & Rempel, 1970; Cattell & Child, 1975; Smith, 1976).

It is interesting that even though researchers consider the satisfaction of needs as critical in the development of morale, the term "needs" is not a part of most morale



definitions. For example, Bentley and Rempel (1970) explain that morale results from "successful interaction among individual needs and incentives and organizational goals" (p. 2). Yet, specific needs are not defined in their construct. Guion (1958) does refer to individual needs in his definition, however he makes no determination as to what those needs are.

### Models of Group-Defined Morale

Blum and Naylor (1968) list four determinants of morale. The first, group cohesiveness, is also identified by Cattell and Stice (as cited by Cattell & Child, 1975). Group cohesiveness is a feeling of togetherness within the group. It involves cooperation among members. The concept of cohesiveness is evident in Deci's (1995) description of relatedness, McClelland's (1971) description of need for affiliation, and Maslow's (1970) concept of belonging. The antithesis of group cohesiveness is isolation, a dimension of alienation (Calabrese & Fisher, 1988).

A second determinant is the presence of a goal. Blum and Naylor (1968) assert that group cohesiveness is easier to achieve when a common goal exists. It is the goal that brings the group together toward a common direction and purpose. The antithesis of the existence of a goal is normlessness, as no standards or direction are set (Calabrese & Fisher, 1988). Growth may be the human need most closely related to goal presence as workers make necessary changes to achieve their goal.

Progress toward goals is the third determinant of morale (Blum & Naylor,

1968). Progress refers to accomplishments. Blum and Naylor's description of progress towards goals is parallel to the human needs of competence described by Deci (1995) and achievement as described by McClelland (1971).

The last determinant of morale in Blum & Naylor's model is meaningful tasks. Meaningfulness of job tasks is a "critical psychological state" that predisposes a worker toward positive personal and work outcomes (Hackman & Oldham, 1980). People feel a need to be responsible for something that has a meaningful impact on others. It is through meaningfulness that an individual is able to influence others and make a difference.

Stogdill's (1959) model of morale describes morale as an achievement in itself, not a factor that brings achievement. Stogdill purports that performance, interactions, and expectations are individual inputs in a job situation. Intervening variables such as function, status, responsibility, and authority influence the individual inputs to create group outputs: productivity, integration, and morale. Morale is a "degree of freedom from restraint in action towards a goal" (p. 13). This definition involves elements of autonomy and motivation. However, Stogdill's model assumes unity of individual and group goals. In his model, individual goals are group goals. This assumption appears to contradict any degree of autonomy.

Cattell and Child (1975) list four factors of morale. The first, what they call "Morale I," is leadership synergy. It is characterized by group unity, optimism for the future, common purpose, sense of leadership competence, and freedom to participate.

It is described as expressing "interest in the existence and purpose of the group through the stimulation and organization of the leader" (p. 38). This definition typifies earlier morale research which suggests that it is the leader who "makes or breaks" morale.

Immediate or gregarious synergy, Morale II, is reflected through group organization, interdependence, cohesiveness, performance, and agreement regarding goals (Cattell & Child, 1975). This factor is labeled "cohesive pride" in the Staff Morale Questionnaire (Smith, 1971). The needs of the group define morale, not the needs of the individuals within the group. Morale II is quite similar to the more recently described concept of "collective efficacy" (Bandura, 1995). Both involve individuals within an organization working together as a unit. On an individual basis, needs for belonging (Maslow, 1970) and for relatedness (Deci, 1995) may be met through group cohesiveness; the individual realizes his/her part in a group.

Morale III is Reward Morale. One's level of this morale factor depends on personal gain through group activity. Gain made through group activity may be either internal or external. Cattell and Child (1975) state that when one's Morale III level is high, there is efficient use of time and minimal argument within the group. A group with a low level of Morale III demonstrates a high sense of frustration and lack of unity. Although this morale factor does not clearly indicate a human need, their description of Morale III specifically illustrates the need to recognize the important role that obstacles to needs fulfillment play in the development of morale.

Morale IV, role morale, stems from effective role interaction within the group.

It results from intrinsic gain through group tasks. Cattell and Child (1975) explain that it stems from psychological gains the individual experiences which are attributed to group role.

Later research on the Cattell and Stice morale model (as cited by Cattell & Child, 1975) reduced the typology to three types of morale: (1) leadership synergy, (2) personal challenge, and (3) cohesive pride. This notion of morale provided the basis for the Staff Morale Questionnaire, a teacher morale instrument (Smith, 1971

### Models of Individual Morale

The group-focus models presented are particularly embraced in the United Kingdom, Australia, and New Zealand, and have been used in extensive research on teacher morale (Smith, 1971, 1976, 1987). All of these models reflect morale as a group phenomenon. More recently, the concept has been re-examined and the notion of morale as an individual attitude is beginning to take precedence. For example, Evans (1992) asserts that morale is an attribute determined by the individual's sense of what is desired compared to what is presently experienced. She refers to the "real self" and the "ideal self." In professions such as teaching, a model of morale based on the individual is much more relevant.

Morale identified through the individual, and not the group, is more complex than individual job satisfaction. Job satisfaction is rooted in the here and now. Morale takes job satisfaction one step further by integrating it with one's anticipatory state.

Morale combines the present sense of job satisfaction with one's job-related expectations for the future. This combination is what triggers motivation in the individual. Cattell & Child (1964) note that a sense of optimism is clearly an element of morale. However, that optimism may be more likely within the individual than within the group. If a worker possesses a sense of optimism while his coworkers are pessimistic, the group may appear to possess low morale, even though individuals within the group do not. When the optimistic worker becomes separated from the group, his positive state of mind for the future becomes more evident.

The existence of varying needs of individuals supports the importance of taking an individual perspective approach to morale. Maslow (1970) theorizes that emphasis on specific levels of needs may vary at any given time, depending on the circumstances. In this same respect, needs will not be assumed to be present at the same level for all individuals. Fundamental needs exist, but individuals' emphases or search for their fulfillment may vary. Some workers may have a stronger need for autonomy, while others desire a greater sense of relatedness. Although collective goals may be evident, there is neither a collective profile of needs nor a set level at which needs must be collectively met. The existence of needs stems from the individual, not the group.

#### The Avoidance of Morale in Favor of Other Terms

Through extensive examination of morale research conducted in the United States, I have found no universally accepted model of morale. The research based in

the United Kingdom nearly exclusively uses a group context model, while research based in the United States uses no specific model. As a result, the topic of morale is often avoided in favor of other variables. Studies intended to gain information about job satisfaction, burnout, and stress are frequently touted as morale studies. The absence of a morale model may allow one to appear to draw conclusions about morale when in fact variables such as job satisfaction, burnout, and stress are at the heart of the study.

Morale is frequently confounded with such concepts as job satisfaction, burnout, and stress. This is unfortunate because morale encompasses these concepts without being a catch-all; one reason it is so vital. Morale reflects more than these concepts as it addresses motivation. It transcends satisfaction, burnout, and stress through the inclusion of present and anticipatory states.

It is common to find articles and reports in which "morale" is used as a descriptor; although the word is never used in the article. An ERIC Database search on articles written between 1990 and 1997 using the descriptor "teacher morale" produced 384 references. Yet when their abstracts and titles were examined, only 14 included morale in their titles, and only 10 quantitatively measured morale. The majority of articles examined stress, burnout, job satisfaction, or some type of program such as incentive pay, in which morale was only incidentally mentioned.

Job satisfaction. Job satisfaction is the term most frequently misused as a synonym for morale in research articles and database descriptors. Job satisfaction's

misuse as an equivalent term for morale is evident even in early writings. For example, the Herzberg studies (as cited by Lawler & Porter, 1978) were instrumental in defining a relationship between job satisfaction and productivity. In their discussion of Herzberg's work, Lawler and Porter refer to the weak relationship found between job satisfaction and morale with productivity. Yet, as their article continues, they phase out the use of the term "morale" and exclusively refer to satisfaction.

The interchanging of job satisfaction and morale makes it difficult to draw clear conclusions about either concept. Smith (1976) argues the importance of an accurate concept of morale:

This is essential if we in Australia are to avoid the errors of workers in the USA where confusion of "morale" with "satisfaction" is rife, where definitional disagreements concerning morale as an input or output variable (or both) result in inconsistent research findings about the relationship between morale and productivity, where some questionnaires are developed quite independently of an accepted definition of morale, and where there sometimes seems lacking an adequate theoretical undergirding to reported studies. It is little wonder that Halpin turned to his organizational climate concept in despair because of the imprecise way in which the morale concept had been used in the literature (p.87).

Although I disagree with Smith's conceptual model of morale, I share his disgust over the lack of a solid foundation behind most morale research. The majority of conclusions about morale determinants fail to identify a meaning for morale. Often no objective measure of morale is used. For example, one article (Mueller, Chase, & Walden, 1988) indexed with the descriptor "teacher morale" discusses a program in Indiana that reduces class size. One of the conclusions made about the program is that it increases teacher morale. Yet no objective means of morale assessment were used in the study.

A critical distinction between morale and job satisfaction lies in the integration of motivation and needs satisfaction in the composition of morale. Job satisfaction suggests a worker's present state, while morale suggests a stronger future orientation. Porter and Lawler (1968) define job satisfaction as "the extent to which rewards actually received meet or exceed the perceived equitable level of rewards" (p.31). This definition does not include any reference to anticipation of further expectancies. Rewards may be received, but job satisfaction does not consider the question, "Will I continue to receive rewards in the future?"

Another distinction between job satisfaction and morale is that job satisfaction is more closely related to cognition (Organ, 1996), while morale is more of an affective state (Doherty, 1988). Studies on "quality of life" (Campbell, 1976; Withey, 1976, as cited by Organ), find that when job-satisfaction measures undergo factor analyses, they load on factors suggestive of cognition. However, quality of life studies tend to focus



more on happiness measures. Similar to quality of life factors, morale measures such as the Doherty Inventory of Psychological Morale (DIPM) are much more reflective of affect than cognition. Evans (1998) expounds on this distinction between job satisfaction and morale when she contrasts the terms “satisfied” and “satisfying.” Being satisfied reflects the concept of job satisfaction, while finding the job satisfying is at the core of morale.

Organ (1996) urges the importance of the distinction between quality of life and job satisfaction because each correlates differently with specific variables such as age. Lower job satisfaction levels are evident in older workers, but there appears to be no statistically significant relationship between age and quality of life. The similarities between quality of life and morale may explain the contrasting results on the job satisfaction levels and morale levels of older teachers (Evans, 1996; NCES, 1997; Smith, 1987).

Burnout. Low morale is also mistakenly used interchangeably with burnout. During the 1970’s and 80’s, teacher burnout became a subject of great interest. Burnout refers to a condition “in which exhaustion is coupled with feelings of personal inadequacy as a result of prolonged exposure to intense stress” (Greenberg, 1996, p.325). Burnout makes no reference to needs, anticipation, or obstacles. However, obstacles may be perceived as stressors which may in turn lead to burnout.

、 The most frequently used instrument to assess burnout is the Maslach Burnout Inventory (MBI) (Maslach and Jackson, 1981). It is composed of three scales:

Emotional Exhaustion, Depersonalization, and Accomplishment. The last two scales address needs of relatedness and achievement, but the MBI is not an adequate substitute for a morale instrument.

Stress. Low morale also is mistakenly equated with stress. Stress refers to the “pattern of emotional states and physiological reaction occurring in response to demands from inside or outside the organizations (i.e., stressors)” (Greenberg, 1996, p. 325).

Stress is not always negative. For example, exercise may be stressful, but foster positive results. Stress fits into a morale model through perceived obstacles of needs fulfillment. But stress levels are not clearly indicative of morale levels because it is possible to experience both a high level of stress and high morale (Hart, 1992).

Recent research suggests that factors which influence morale work differently from those that are related to stress in workers’ perceptions of their quality of work life (Hart, 1992). Parallel to Herzberg’s (1966) two-factor theory, an argument can be made that morale and stress are two different dimensions of the quality of work life.

An analogy can be made to illustrate the distinction between morale and its most commonly substituted terms. Consider the physician whose primary goal is to keep her patient alive compared to the doctor who strives to keep her patients healthy. Morale goes beyond sustenance (job satisfaction), illness (burnout), and ailments (stress).

### Morale and Disposition

Some researchers argue that morale is primarily tied to dispositional factors (Schneider & Dachler, 1978; Staw, 1996). They claim that external organizational variables, such as leadership behavior and recognition, make meager contributions to morale. Three large longitudinal personality projects have been underway through the University of California at Berkeley for over fifty years. These findings have been combined into what is now known as the Intergenerational Study (Staw, Bell, & Clausen, 1986, as cited by Staw, 1996).

Individuals' positive and negative attitudes toward jobs have been found to be relatively unchanging over the decades, even when jobs have changed. However, it cannot be concluded that situational factors have no impact on the individual. If a worker tends to hold negative attitudes, those attitudes are by no means static. Specific job circumstances will contribute to the level of negativity held by the worker (Staw, 1996).

On the other pole, if a worker tends to be positive, it is possible that the worker's attitude will become less positive if needs fulfillment declines. Although people may have tendencies towards positive or negative attitudes, there are factors within the organization that will augment or diminish these tendencies.

### Morale and Productivity

Conventional wisdom may state that a happy worker is a productive worker, but studies have not been as conclusive. Research results demonstrate that although a correlation exists, no statistically significant relationship between performance and morale is present (Brayfield & Crockett, 1978; Steers, Porter, & Bigley, 1996; Vroom, 1964). However, there may have been limits to the studies' research methods which led to these conclusions.

First, job satisfaction studies conducted in the 1950's and 1960's focused heavily on leadership. Strong, positive leadership was supposed to lead to job satisfaction, which in turn could lead to enhanced productivity. However, strong negative leadership may also enhance productivity. Sayles & Strauss (1966) suggest that both low and high levels of morale may be related to productivity. They offer the example of a concentration camp which may exhibit high productivity. This example suggests the possibility of a curvilinear relationship between morale and productivity. Studies by Herzberg and Brayfield and Crockett (as cited by Lawler & Porter, 1978) examined correlations, linear relationships. If a curvilinear relationship does exist, it may have been overlooked as a result of the methods used to determine the relationship. It may also have weakened the correlation coefficients.

The possibility of a curvilinear relationship is evident in Sayles' and Strauss' (1966) description of a morale/productivity study, in which the plant demonstrating the highest productivity also had the highest level of morale in its workers. Interestingly,

the second highest productive company had very low morale.

Most of the research suggesting only a weak relationship between morale and productivity has been conducted in a product-oriented organization. In addition, because the researchers have employed varying definitions of morale, it is difficult to define and measure productivity's relationship to the word "morale." In many cases, morale has been erroneously used interchangeably with the term "job satisfaction." Satisfaction can suggest complacency; morale suggests motivation. A person may be satisfied to the extent of stagnation.

#### Morale Models' Applications to Human Needs Theory

A morale model should be applicable to any job. Although specific job-related influences may differ, jobs are human enterprises. Because research on morale is based on research rooted in industrial organizational psychology, a human needs approach is most appropriate. It addresses an element universal in all workers: the existence of needs.

Construct analyses of various morale models reveal that many human needs theories' concepts are present within the models. Descriptions of morale factors parallel several human needs that have been well substantiated through research and theory. Needs which appear to be most germane to the work place include competence, autonomy, relatedness, power, recognition, security, and growth.

### Developments in Needs Theory

Needs are a type of motive (McClelland, 1971). They provide a direction for human pursuits. During the 1930's, Murray (1938) attempted to systematically identify all human needs. His examination resulted in a list of nearly two dozen needs. As a means of measuring needs, he developed the Thematic Apperception Test (TAT).

Murray's lengthy list of needs made any attempt at parsimonious research difficult. McClelland (1971) extensively utilized the TAT to examine three specific needs cited by Murray: power, affiliation, and achievement. McClelland's theory differs from other theories in that he asserts that needs are learned, which explains why levels of needs vary in people.

Maslow's (1970) hierarchy of needs theory was one of the first used in organizations. He postulates that needs are progressive in nature. Lower-order needs must be met before an individual can focus attention on higher-order needs. More recently, Deci (1995) has focused on three basic needs: competence, relatedness, and autonomy. He has applied his research to the relationship between motivation and fulfillment of needs to the job situation.

Autonomy. Autonomy has been identified as a psychological need (Deci, 1995), a morale inflator (Pellicer, 1984), and a dimension of morale (Dreeben, 1973). The existence of the need for autonomy provides good reason to define morale through an individual perspective. To perceive morale specifically as a group phenomenon denies the importance of individual autonomy.

Birch and Veroff (1966) also identify autonomy as a need. They describe autonomy as an ability to control one's work place and a desire for independence. Excessive rules hinder autonomy. Autonomy and relatedness do not exclude one another. The autonomous individual is the origin of his/her own actions and decisions. Belonging to or affiliating with a group is by choice. Stogdill (1959) even identifies morale as related to degree of freedom, although he sees it as existing within a group context.

Competence. The need for competence is a second basic need addressed by Deci (1995). He states that competence results from an individual taking on and meeting optimal challenges. Competence is closely related to McClelland's (1971) concept of achievement. It has also been identified as a type of group morale (Cattell & Child, 1975) and a dimension of morale (Pellicer, 1984). Competence does not indicate meeting minimum standards. It suggests the ability to succeed and to be accountable for one's accomplishments.

Relatedness. Relatedness is a third basic need identified by Deci (1995). It is related to McClelland's (1971) description of affiliation and Maslow's (1970) description of belonging. Relatedness is a social need. It helps the individual identify himself in context to others.

The antithesis of relatedness is isolation (Dean, 1961). Isolation is associated with burnout. It has both psychological and physiological implications. Isolation has been closely tied to *failure to thrive*, a condition in which infants simply give up their

fight for survival. This suggests that the need for relatedness is inherent from birth. It is truly a critical need.

Power. The need for power is described by McClelland (1971) and Glaser (1984). It implies having the ability to influence others. Power is similar in nature to the need for autonomy. Both stem from an inner locus of control. Power differs from autonomy, however, in that it is more socially manifested: others' reactions provide the opportunity for power to exist.

Powerlessness is an indicator of alienation (Dean, 1961). It is strongly related to teacher stress (Czrujak, 1996). Powerlessness is also associated with an external locus of control, which negatively affects teachers and their students. A sense of powerlessness is evident in low morale (Doherty, 1988).

Recognition. Recognition has been cited as a need (Murray, 1938), a motivator (Herzberg, 1978), and a dimension of morale (Pellicer, 1984). It stems from a combination of the needs for relatedness and competence. Recognition may be derived from a sense of affiliation in that it involves the interaction of the individual and others. Recognition also appears to be an extrinsic affirmation of competence.

The need for recognition in the workplace was given great attention when Herzberg (1978) identified it as a content factor leading to enhanced job satisfaction. In contrast to job factors that result in job dissatisfaction, factors like recognition have intrinsic value.

There are important implications to consider as a result of the intrinsic value of



recognition. Recognition takes myriad forms. It may be private or public; provided by subordinates, superiors, or peers; and be verbal or material. However, the way in which recognition is perceived by the recipient is critical. When recognition appears to be used as a means of control, such as it might be when used in an incentive plan, people tend to resent it. It shifts the locus of control from internal to external, thus undermining intrinsic motivation (Ryan, 1992). When recognition is viewed as genuine, perhaps as a symbol of appreciation, its meaning and benefit to the individual are both increased.

Security. In this study, security refers to the existence of stable conditions in the environment that allows the worker to make predictions based on previous experiences. Security involves a forward state of mind and provides the worker with norms and a sense of stability.

Maslow (1971) contends that a sense of security must be present before an employee can pursue growth. Without a stable foundation, a worker is more likely to falter. Growth is risky. It means leaving one's preset state for something that isn't certain. The evidence of security compensates for the risk associated with growth.

Growth. A primary distinction between job satisfaction and morale is growth. To understand the concept of morale, one must consider the role that motivation plays in its development (Guion, 1958). Motivational theory relies on a goal, a target to aim at. Growth occurs when a goal achievement is realized. For motivation to continue, there must always be a purpose for moving forward.

Morale affects an individual's behaviors toward a goal. It is the goal that perpetuates the existence of a "forward state of mind." To possess job satisfaction is simply a state of being. It is not an attitude that necessarily predisposes one to any given behaviors. A worker may be very satisfied with work to the extent of complacency. In fact, the potential for complacency when job satisfaction exists may explain the weak relationship between job satisfaction and productivity.

Alderfer (1972) posits that the need for growth is present in all people. Growth represents the opportunity for individuals to use their abilities to the fullest, something related to Maslow's (1971) concept of self-actualization. However, Maslow cautions that growth is related to other needs: particularly competence, recognition, and security. The need for growth poses a paradox. Maslow explains "growth has not only rewards and pleasures but also many intrinsic pains and always will have" (p.229). Growth occurs in spite of the losses associated with it.

Doherty (1988) suggests that growth is a component of morale when he explains that "low psychological morale implies that the individual sees himself as one who is relatively powerless, who is socially unimportant, who leads a flat and unexciting life, etc." (p. 67). The "flat and unexciting life" suggests that nothing new lies over the horizon: growth is not occurring.

The seven human needs presented in this review serve as the foundation of the morale model used in the study. These needs are applicable to any job situation. The following section will discuss the human needs-based morale model in the context of the teacher's work.

### **Teacher Morale Literature**

#### Needs as they Apply to Teacher Morale

The human needs component of morale provides the foundation of its construct. Although teachers' psychological needs may be partially met within the classroom, needs fulfillment occurs in other contexts as well.

Autonomy and Teachers. A large study conducted by the National Center for Educational Statistics (NCES) in 1997 indicates that teacher autonomy is an important part of teachers' job satisfaction. Although morale and job satisfaction are not synonymous, high morale will not be present without a sense of satisfaction.

The need for autonomy in teachers has been reified through the movement toward teacher empowerment. Research indicates that teachers want control over decisions affecting them and that lack of control over decisions is a morale deflator (Brodinsky, 1984).

Autonomy is closely related to locus of control. Teachers who perceive they possess autonomy are more likely to possess an inner locus of control: they are the origin of their actions. An inner locus of control is associated with innovative teaching practices and better student behavior (Rose & Medway, 1981). Teachers who

experience inner locus of control also tend to have more positive performance evaluations from administrators, perceive less stress, and report greater student achievement (Czujbak, 1996).

Autonomy is also closely related to deCharms's (1968) concept of "personal causation." The theory of personal causation argues that people possess a need to see themselves as the origin of their behaviors. Personal causation reflects the need for inner locus of control. deCharms uses the terms "Origin" and "Pawn" to describe varying terms of self-perception. An Origin perceives that his behavior stems from his own choosing. A Pawn perceives that external forces determine his behavior. The desire for personal causation may explain the resistance that teachers often demonstrate when new policies or changes directly affecting them are implemented by the upper tier of the school hierarchy.

Competence and Teachers. In an NASSP study, Parker (as cited by Brown & Henry, 1992) cites good morale as a result of satisfaction and success. He reports that teachers measure their competence through student interaction, response, and achievement. The teacher's primary goal is to teach the students. Regardless of the administrator's observations or comments, the teacher tends to measure his/her performance based on growth and change in his/her students.

Some researchers assert that productivity leads to satisfaction (Porter & Lawler, 1968). From this perspective, competence is an antecedent to morale. This basis for competence supports the need for student issues to be addressed more

extensively in morale measures. When teachers are able to demonstrate competence through their successes with students, their morale may be heightened.

Teachers' competencies are measured in a variety of ways and on several levels. Competence is assessed both internally and externally. Internally, principals assess teacher competencies through participation in the evaluation process. Externally, the public annually assesses collective teacher competencies from reports on student achievement test results. Student interaction in the classroom, teaching methods, and student performance are the benchmarks used for evaluating teacher effectiveness.

Teachers in elementary and secondary schools have different levels of accountability. Elementary teachers are directly responsible for each individual child in their charge. On the secondary level, because teachers share students through the day, the direct relationship between a specific teacher's efforts and a given student's achievement is more difficult to discern.

At the secondary level, students' education is an additive task. Several people are responsible for it. This may invite social loafing, the lack of effort or sense of responsibility towards a task as an individual plays a smaller part in the development of a product (Greenberg, 1996). It may also be more difficult for some teachers to recognize their competencies if they are less directly involved in the changing of student behavior.

Relatedness and Teachers. The prime focus of teacher morale research in the past has been the teacher's rapport with administration and sense collegiality with

peers. But perhaps it is not the identity of the participants that is most important, but rather the very existence of rapport or relatedness itself. Obviously in a school, a teacher will interact one a day to day basis with other teachers and possibly with the principal. However, a great deal of the need for relatedness may be met through student interaction: the heart of the education process lies between the interaction of teacher and students (NCES, 1997).

The relatedness between teacher and student is critical in a teacher's attitude toward teaching (Kottkamp, 1990). When Lortie (1975) explored intrinsic or "psychic" rewards in teaching to determine how teachers derived a sense of satisfaction, 86% selected "knowing that I have 'reached' students and they have learned." When this study was replicated a decade later, Kottkamp, Provenzo, and Cohn (as cited by Kottkamp, 1990) found nearly identical results. Eighty-seven percent of teachers selected the same response.

Research indicates that elementary and secondary teachers exhibit different levels of morale. One Atlanta study (Fraser, 1990) concludes that teacher morale is lowest at the junior high level. This drop in teacher morale as students age also supports the theory that some teacher relatedness needs are met through interaction with students. In lower grades, teachers tend to spend the entire day with the same group of students: they get to know one another well. In secondary schools, teachers serve a much larger group of students and their interactions are limited by the length of the period. The opportunity for relatedness to develop is not as great.

The student factor is critical in examining teacher morale. Studies conducted by Schaer and Trentham (1986) and the NCES (1997) conclude that teachers feel most rewarded by their interactions with students. By the same account, their greatest frustrations often involve students. This second point may also explain the differences between the morale levels of elementary and secondary teachers (Fraser, 1990). The NCES report states that the secondary teachers who were less satisfied with their jobs were those who felt more threatened by students.

Overwhelmingly, most teachers enter the profession because they want to work with students in the classroom. Imber and Niedt (1990) summarize it well concluding that, "by far the largest proportion of intrinsic reward and job satisfaction in teaching (to the extent that these exist) derives from classroom work and other direct association with students" (p.67).

Surveys conducted by the National Education Association (as cited by Imber & Niedt, 1990) indicate that the desire to work with young people is the primary reason teachers enter and stay in the profession. Roughly two-thirds of the teachers surveyed in both studies cite this as the most important factor in entering or staying in teaching. Consider college students preparing to be teachers. A common question is "why do you want to become a teacher?". A very common response: "Because I love kids." Never do we hear "because I enjoy working with other teachers," or "because I've always wanted to work under a principal." The student factor must not be omitted.

Power and Teachers. In the teaching profession, the need for power is addressed in studies of teacher efficacy. Teacher efficacy refers to teachers' perceptions that their actions and beliefs directly affect students. Researchers have found a relationship between teacher efficacy and student achievement (Coladarci, 1992; Parkay, Olejnik, & Praller, 1988). Teachers with a sense of efficacy also tend to be more committed to the organization (Coladarci, 1992).

The movement toward teacher empowerment reflects some teachers' need to have power within the school aside from the power they have over students. In spite of some teachers' outcries for empowerment, many teachers are not in favor of the teacher empowerment movement (Reyes, 1989). This difference in teachers supports the conclusion that the need for power does not exist at a consistent level for all people.

When a need for power becomes controlling in nature, it may undermine the teacher's original intent for success. Students, regardless of age group, tend to perform better when they perceive the teacher to be genuinely interested in the subject and less controlling (Deci, 1995; Wild, Nix, Deci, & Enzle, 1997). It may be that the teacher who feels powerless approaches instruction in a more controlling way as a means of countering what is missing in his/her life. The teacher's lack of power and subsequent attempt at compensation through instructional behaviors can develop into a counterproductive cycle.

An index developed by the NCES (1997) uses the question "To what degree do



you agree or disagree with the statement ‘I sometimes feel it is a waste of my time to try to do my best as a teacher’” as one determiner of job satisfaction. This question reflects a relationship between power and motivation. When teachers feel powerless, their expectancy diminishes, and in turn their level of motivation.

Recognition and Teaching. In analyzing recognition of teachers, it is worth asking “recognition from whom” and “recognition for what”. Recognition in the teaching profession encompasses issues of teacher status, merit pay, and site-based and national teacher recognition programs. Recognition has been found to be a strong indicator of teacher morale (Briggs & Richardson, 1992), and a good technique for improving morale (Lester, 1990). Lack of recognition has been identified as a major contributor to teacher attrition (Natale, 1993).

Teachers have been noted to prefer recognition in private as opposed to public (Evans, 1996). Teachers’ preference for recognition to be private and personal supports the idea of a relationship between affiliation and recognition. A teacher is more apt to gain a sense of belonging from small-scale, personal recognition.

Recognition has been used often in satisfaction studies. For example, the Teacher Job Satisfaction Questionnaire (Lester, 1984) includes recognition as a factor in its assessment of job satisfaction. Recognition is defined as involving “the attention, appreciation, prestige, and esteem of supervisors, colleagues, students, and parents” (p. 83) (Lester & Bishop, 1997).

Parent support is paramount to teachers’ sense of satisfaction (NCES, 1997).

However, it is not merely a show of support. It is a form of external recognition which identifies the teacher as a professional: one whose judgment can be trusted.

Security and Teaching. Lester (1984) defines security as “the school’s policies regarding tenure, seniority, layoffs, pension, retirement, and dismissal.” In general, the discontinuation of employment in a district rarely is a true threat. In fact, schools are often criticized for their failure to weed out ineffective teachers.

Pragmatic concerns, such as the ability to support one’s family, are important. However, security in teachers goes beyond the contract. Security the employment of norms: policies and procedures that are reliable and provide guidance in what to expect. Teachers are aware of what is going on in the school and can count on effective organizational communication.

Consistency and continuity in the organization are vital components of security (Engel, 1986). For example, when teachers are provided with staff handbooks outlining disciplinary steps towards due process, they need to know that procedures will be adhered to consistently. Problems arise when a student discipline issue arises and the administrator takes less action than stated in the handbook. Although this scenario may be a reflection on administrative effectiveness, it ultimately threatens the teacher teacher’s sense of security. It is this need that is at the heart of the matter.

Security is related to anticipated fulfillment of needs when change in the status quo disrupts the equilibrium of the teacher. Briggs and Richardson (1992) note that teachers have a strong tendency to resist change, even when it is for the better.

Perhaps the questions to be examined are “better for whom” and “better in what way?”

If teachers are particularly resistant to change, it may be due to their need for security (Evans, 1996). However, teachers’ reluctance for change may not always reflect a concern about security. It may also be due to a concern about loss of autonomy. People do not mind change - they just don’t like to be changed (Kohn, 1993).

Growth and Teaching. Growth of teachers is a need which is not given a lot of attention. When it is addressed, efforts to generate it usually take an external form through such programs as career ladders, merit pay, or mentoring. When growth is examined as advancement, a motivator (Herzberg, 1978), it generally means leaving teaching and going into administration.

Most growth systems in place appear to involve the loss of inner locus of control for the teacher. Growth programs are typically not used as antecedents. They take on the form of rewards or types of recognition. Through these means, districts urge teachers to grow. For the most part, teachers are not consulted in the development of designs aimed at promoting growth for teachers (Matthes, 1990).

What seems to pervade is a lack of attention on intrinsic growth of teachers in favor of an attempt to “grow” teachers as one may grow plants. The problem with this approach is that the teachers are not always fed prior to growth, merely after. This would be a disastrous method if applied to other living things.

An underlying characteristic of growth plans is to inspire teachers to use

innovative and effective methods in pursuing the ultimate goal of student achievement. Incentive and merit plans have not been found to make better teachers (Clees & Nabors, 1992). This may be attributed to several reasons. But the most basic thing to consider in the implementation of a plan for growth is that in order for growth to occur, the prerequisites must be met first: not offered as a reward.

The fact that teachers generally are not in favor of growth plans (Matthes, 1990) does not mean that they are not in favor of growth. As an inherent need, teachers should seek growth once prerequisites are in place. They must feel secure and they must be given the capacity. When obstacles are present, the capacity for growth is easily thwarted.

Anticipated Fulfillment of Needs. The anticipated fulfillment of needs is critical to the study of morale. Future expectations, hopes, and fears affect a worker's perceptions of instrumentality and valence: critical elements of motivation (Vroom, 1964). The roles of expectancy, instrumentality, and valence are seen in teachers' reactions to mandated curricula, changes in administration, and budget cuts. They may perceive changes as making it more difficult to succeed in teaching, less likely to receive appropriate recognition, or less likely that rewards will be of value.

Only vague reference to anticipated fulfillment of needs is present in the literature. McClelland (1971) describes the concepts of hope, fear, and anxiety as they apply to human needs. Satisfaction of needs is an inherent goal not only in a present state, but in the future. If the likelihood of meeting needs is expected to change, then

morale will be affected. People will be either less driven as needs fulfillment becomes more unlikely, or more driven as needs are met. Anticipated fulfillment of needs addresses one's forward state of mind.

Obstacles to Needs Fulfillment. Obstacles to needs fulfillment are a critical element of morale. Clearly, if obstacles to needs fulfillment exist, then satisfaction of needs will not occur. The perceived likelihood of needs fulfillment in the future will also diminish, affecting motivation.

Although some researchers contend that morale is a positive dimension of job perception, others assert that morale is bipolar. In studies of quality of work life, it has been found to be a positive dimension (Hart, 1992), while stress is a negative dimension. However, using a human needs approach, morale should be more of a continuum in essence. Needs are met to greater or lesser degrees.

Obstacles play a critical role in morale in that they divert the worker's focus from the future to the present, in turn placing the worker in a state of stagnation. It is only after obstacles are overcome that growth and continued pursuit of needs fulfillment can occur.

Obstacles to needs fulfillment take numerous forms. They may include policies, lack of funds, colleagues, or students. The role that obstacles play can be illustrated in the classroom where a teacher wishes to engage students in a learning activity but cannot because of a given student's behavior. At that moment, the teacher's goal of classroom learning, which helps to fulfill a need for competence, is re-directed toward

obstacle removal. This shift in focus is similar to Maslow's (1970) theory that when a specific need is not met, the individual will pursue fulfillment of that need prior to moving toward another and higher need.

Obstacles in the school organization may be perceived as a result of specific leadership practices. Leadership which is perceived as controlling and unsupportive can become an obstacle to a teacher's needs for autonomy and power. Lack of funds for an accelerated intervention program for low-achieving students may diminish a teacher's sense of competence fulfillment. Placement of a teacher in a portable classroom outside of the building may affect a teacher's need for relatedness.

The use of obstacles to needs fulfillment in a morale model is parallel to Herzberg's (1978) two-factor theory. Hygiene factors lead to dissatisfaction, but do not contribute to satisfaction. The removal of obstacles may not guarantee improved morale, but it may prevent hindrance to its development.

### Variables Specific to Teaching

Basic Support and Materials for Teachers. Specific to teaching, problems in getting access to basic financial support and materials needed for the classroom are increasingly evident. In the teaching profession, it is common for educators to spend their own money on educational tools.

Budget nightmares, cutbacks, tax lids, etc., all lead to a lack of support which in turn becomes an obstacle to needs fulfillment of the teacher. The need for basic

support and materials ties directly to Vroom's (1964) expectancy theory. Basic support and materials determine the expectancy of the worker. An employee can not succeed on ability alone. Consider the athlete with substandard equipment. The same holds true for the teacher. Teachers need basic materials and support to perform their jobs.

In repeated analyses, availability of resources has been found to be associated with teacher job satisfaction (NCES, 1997). The absence of basic support and materials not only affects a teacher's sense of expectancy, it alters his or her perception of the sources in control of resources. For example, if a teacher requests materials and is denied, it may be perceived as negative recognition: the teacher's requests do not matter.

In fact, support and materials are at times used as a reward. Incentive programs exist which recognize effective schools through provision of more materials (Kelley, 1995). This poses a real paradox when some schools may be struggling due to lack of basic provisions. In education, basic materials and support should be a given; not used as a reward.

### The Influence of Morale on Teachers and Teaching

Teacher morale has been determined to influence a variety of things associated with the educational profession. It has been associated with improved reading scores, student achievement, teacher turnover, teacher absenteeism, and teachers' organizational commitment (Briggs & Richardson, 1992; Bruno, 1992; Fraser, 1990;

White, 1988; Zigarelli, 1996). Teacher morale also is related to specific teaching behaviors which affect the quality of students' education (Greenwood & Soar, 1973). Morale is also identified as an important component of school health in the measurement of organizational climate (Halpin, 1966; Hart, 1992; Hoy, Tarter, & Kottkamp, 1991).

High teacher turnover has caused a great deal of attention to be given to the morale levels of public school educators during the past two decades. Concerns have also been directed towards student progress and the impact that teacher morale has on job performance (Pelsma, Harrington, & Barry, 1989). A low morale level may lead to a lack of commitment and effort, ultimately hindering the education of those students assigned to teachers who demonstrate low morale.

Teacher turnover is a concern in this nation. One National Education Association (NEA) (as cited by Farber, 1984) study suggests that 41% of teachers would not teach if given the choice again, and only 43% intend to continue teaching until retirement age. Of 9000 teachers laid off in New York City in the mid-1970s, only 2400 returned when offered reinstatement (Wangberg & Metzger, 1982). These figures indicate that retaining teachers is a challenge for school districts.

Several districts have paid particular attention to the concerns of teachers through the examination of morale. To address a concern over high teacher turnover and moonlighting, a series of questionnaires have been provided to teachers in Texas during the 1980's and 1990's (Henderson, 1994). The results of the questionnaires



have been used to steer district policy in order to retain teachers and lower turnover.

Organizational commitment is another variable associated with morale.

Workers high in organizational commitment tend to have better attendance and tend to be more willing to share and to make sacrifices for the organization (Greenberg, 1996; Organ, 1988). They are also more likely to aid others within the organization "for the good of the cause."

Absenteeism has an inverse relationship to teacher morale: as morale decreases, absenteeism increases (Bruno, 1983; Engel, 1984). Teacher absenteeism is costly to the district, disrupts the continuity and consistency of the students' education, and in some cases imposes on other teachers when there are shortages of substitutes.

Those with high job satisfaction tend to exhibit organizational citizenship behavior (Greenberg, 1996). This term refers to helping others, sacrificing for the good of the organization, and going beyond what is expected of the employee. It seems likely that morale should have a similar relationship to organizational citizenship behavior.

There are relationships between morale and specific teacher behaviors.

Greenwood and Soar (1973) found that primary teachers with high morale display greater acceptance of students' interaction and talk in classroom discussion. Teachers exhibit less lecture to students, referred to as "Teacher Talk." Teachers also allow for greater participation of students in their learning. Student involvement in the learning process has been advocated by researchers as a preferred approach for learning (Taylor

& Bullard, 1995). Higher morale predisposes the teacher to engage in this preferred approach.

### Comparative Studies

Through analyses of over 100 dissertations on morale conducted in Australia and New Zealand, Smith (1987) identified several demographic variables associated with morale. Numerous studies suggest that older teachers (age 51 and over) exhibit a higher morale level than younger teachers. In fact, he found no study in which younger teachers possessed higher levels of morale.

Smith (1987) claims that these findings are similar to findings in the United States. However, a recent NCES (1997) report suggests the opposite. It finds that older teachers are less satisfied with their profession. There are two possible explanations to this contradiction of findings. First, the research analyzed by Smith exclusively used the Staff Morale Questionnaire. As a result, what is discussed as morale may simply be a reflection of more experienced teachers' sense of collegiality: a natural occurrence as one has been a part of an organization for many years. In addition, the NCES study, like most studies conducted in the United States, examined job satisfaction, only one component of morale.

Teachers who work with students in grades K-4 have a tendency to possess a higher level of job satisfaction (NCES, 1997). Although job satisfaction is not the same as morale, an extensive Atlanta study (Fraser, 1990) supports these findings. By far,

morale was found to be highest at the elementary level, and lowest at the middle school/jr. high level. Further analysis may have found larger differences, similar to the NCES, if comparison of lower and upper elementary levels had been examined.

Public elementary teachers tend to possess higher levels of satisfaction when there is a lower percentage of students on a free or reduced price lunch plan. However, this factor does not appear to be related to secondary teachers' levels of satisfaction (NCES, 1997). These results contradict previous studies (e.g., Bruno, 1983) which conclude that morale tends to be lower in low socioeconomic status urban schools.

#### Morale and Productivity in the Classroom

Although there appears to be only a weak link between job satisfaction and productivity (Vroom, 1964) these conclusions cannot be generalized to include the field of education. The greatest difficulty in determining a link between teacher morale and teacher productivity is that there has been no universally agreed upon measure for either teacher morale or teacher productivity. No universal measure of objective assessment of productivity exists for teachers. One emphasized measure of teachers' success is student achievement. This strongly suggests the need to include more items pertaining to student issues and concerns when examining teacher morale. Student response and achievement define the teacher's need for competence.

The Porter-Lawler model (Steers, Porter, & Bigley, 1996) attempts to explain a

relationship between productivity and job satisfaction. However, the research used in the development of this model focused on pay as it relates to employee motivation. Numerous studies indicate that pay is not a reliable predictor of teacher morale or job satisfaction (Lester, 1984; NCES, 1997). Therefore, the applicability of this model to education is questionable.

Several studies find that a statistically significant relationship exists between student achievement and teacher morale (e.g., White, 1988; Zigarelli, 1996). For example, Howard (1989) concludes that reading achievement is related to teacher morale. If measurable student achievement is the defining factor of teacher competence, then there may be a relationship between productivity and morale in the field of education.

### **Instruments Used to Define, Measure, and Assess Teacher Morale**

#### **Organizational Climate Subscales**

There appear to be as many attempts at measuring morale as there are definitions. At times, morale is measured through the use of subscales in organizational climate surveys as the Esprit scale in Halpin and Croft's Organizational Climate Description Questionnaire (OCDQ) (as cited by Clover, 1984) or the Morale subscale in the School Organisational Health Questionnaire (SOHQ) (Hart, Conn, & Carter, 1992) (as cited by Hart, 1996). A primary problem with this method is that it is very difficult to come to meaningful conclusions when the instrument has fewer than ten

questions.

Another problem lies in the use of peer judgment as a way of distinguishing morale levels. In a profession characterized by the isolation of its employees (Reyes, 1989), subjective judgment of colleagues is suspect. In addition, the morale subtests of climate surveys tend to limit their scope to items specifically targeting definitional variables. For example, the SOHQ (Hart, 1996) uses a definition of “energy, enthusiasm, team spirit and pride that teachers experience in their school,” to construct five statements for morale measurement. Statements such as “there is a lot of energy in this school” and “the morale in this school is high” are too vague for conclusions or generalizations.

### Teacher Morale Instruments

In analyzing the morale of teachers, two morale instruments have been predominantly used. They are the Staff Morale Questionnaire (Smith, 1971) and the Purdue Teacher Opinionnaire (Bentley & Rempel, 1970). While the two differ greatly in their theoretical foundations, identified dimensions of morale, and length, they do share two similarities. First, both were developed nearly three decades ago and, second, both fail to thoroughly address the important influence students may have on teacher morale.

#### The Staff Morale Questionnaire. The Staff Morale Questionnaire (SMQ)

(Smith, 1971) is one of the most widely used teacher morale measures. It is based on research done by Cattell & Stice (as cited by Cattell & Child, 1975) and offers a refinement of Stogdill's (1959) model of morale. Consistent with its theoretical foundation, the SMQ places emphasis on morale as a group phenomenon. It identifies three dimensions of morale. They are: (1) cohesive pride; (2) personal challenge; and (3) leadership synergy. Cohesive pride refers to the cooperation used to achieve school objectives. Personal challenge refers to incentives received from job satisfaction and assesses how a group utilizes its potential for freedom. Leadership synergy refers to the energy of the group. It is identified as the most influential factor (Lester & Bishop, 1997).

Consistent with the human needs-based morale model discussed earlier, the SMQ has several items that pertain to human needs. For example item 9 asks “On the whole, how much chance is given to you in this school to show what you can really do?” The ability to demonstrate one’s competencies is strongly related to the needs for autonomy and competence. In the SMQ, teacher competency is also depicted by the statement “The teaching I am doing at present gives me a feeling of success and pride.” It is loaded as a component of the factor Personal Challenge.

It is essential to note several limitations of the SMQ. First, most morale research conducted in the middle of this century was based on models developed in the field of industrial organization. For example, the Cattell and Stice (as cited by Cattell & Child, 1975) model of morale is based on research conducted in the 1950's and

1960's for the United States Office of Naval Research. Between 80 and 100 groups of ten men each participated. Each group was assigned specific tasks to perform. In order to promote effective group work, participants were provided an incentive of \$100.00 for best group performance. Although statistical analyses conclude robustness, it is possible that the use of extrinsic reward may have affected the study and the focus of individuals within the group.

The use of money as an incentive may have altered the nature of participants' motivation in the Cattell and Stice study (as cited by Cattell & Child, 1975). It may have shifted the focus from intrinsic motivation to extrinsic. There is a good deal of research evidence (e.g. Deci, 1995; Ryan, 1992) that extrinsic control undermines intrinsic motivation. If morale has any relationship to inherent values, then extrinsic variables, such as reward, may mask the true nature of morale.

The research methods of Cattell & Stice (as cited by Cattell & Child, 1975) also emphasize group and teamwork, while teachers' primary successes are defined by what is conducted in the classroom on an individual basis (Schaer & Trentham, 1986). In addition, the environment studied by Cattell and Stice is very different from that of the school. Thus, it is a questionable practice to generalize results based on a controlled industrial setting to a public classroom.

Another concern pertains to items that seem inconsistent with the SMQ's theoretical base. Smith (1976) defines morale as a "confident and forward-looking state of mind relevant to a shared and vital purpose" (p. 87). "Optimism for the future

of the group" was originally identified by Cattell & Stice (as cited by Cattell & Child, 1975) as a chief loading of the leadership synergy factor. Yet none of the items developed for the SMQ refer to outlook or anticipation of the future. Considering the changes occurring in the schools during the 1980's and 1990's and anticipated changes of the next century, greater attention to the "forward-looking state of mind" is needed.

Morale clearly involves an element of motivation (Cattell & Child, 1968; Chaplin, 1979; Evans, 1992; Guion, 1958). Yet, in omitting items indicative of expectations, the SMQ overlooks the role of motivation. Survey items provide insight into teachers' views of what is occurring in the present, not what they anticipate.

In addition, it is important to consider the context of research during the time when the SMQ's theoretical foundations were developed. During the 1940's, 1950's, and 1960's organizational research emphasis was on leadership. Stogdill (1959) was one of the major researchers in the Michigan Study on leadership. Leadership was considered to be at the heart of the organization as the primary influence in worker behavior. It is possible that morale questionnaires contain more items relating specifically to leadership as a reflection of the times rather than as a representation of any morale construct. In fact, the Phi Delta Kappa Commission on Teacher/Faculty Morale (1985) reports that although leadership may help, there is insufficient evidence to conclude a direct link between leader behaviors and levels of subordinate morale.

There also may be some problems with the construct validity of the SMQ. More recent examination of the construct validity of the SMQ to test its applicability in



Singapore used two separate factor analyses conducted four months apart using similar groups and numbers of teachers (Wong, 1991). Both analyses concluded that three factors were evident. However, out of the 31 items, only 10 loaded on the same factors: six for leadership synergy, and two each for cohesive pride and personal challenge. In the first analysis, seven of the 31 items did not load onto any factors. In the second analysis, four did not load onto any specific factor. Wong concludes that construct validity is evident even though the items indicative of the constructs are inconsistent.

Finally, although the Staff Morale Questionnaire is used to measure morale in relation to the school, it includes no items pertaining to students. This is not necessarily surprising, however, considering the focus on groups in the SMQ's conceptual framework (Smith, 1971). But to exclude student issues or concerns from the morale survey suggests that student relations with the teacher have no significant influence on morale. This is a questionable assumption.

The Purdue Teacher Opinionnaire. The most cited teacher morale instrument in the United States is the Purdue Teacher Opinionnaire (PTO) (Bentley & Rempel, 1970). It identifies ten dimensions of morale:

Teacher Rapport with Principal

Satisfaction with Teaching

Rapport Among Teachers

Teacher Salary

Teacher Load

Curriculum Issues  
Teacher Status  
Community Support of Education  
School Facilities and Services  
Community Pressures.

The method for validating the Purdue Teacher Opinionnaire (PTO) involved peer judgment. Teachers were asked to identify staff members they perceived to have high, low, and medium levels of morale. When the teachers possessing varied levels of morale completed the PTO, statistically significant differences were found between their scores. Differences were consistent with the peer judgments. The theoretical framework behind the PTO acknowledges both individual and group needs, and the PTO can yield both individual and group morale scores (Rempel & Bentley, 1964).

Many items on the PTO Teacher address human needs. For example, item 70 addresses the need for autonomy in asking the teacher to indicate whether the principal “supervises or ‘snoopervises.’” Item 90 pertains to whether or not teachers have the opportunity to show initiative and creativity in their teaching assignments.

Items 70 and 90 have both been identified through factor analysis as loading on factors related to leadership. However, they both reflect the need for autonomy. This may be explained by considering the means by which a teacher acquires autonomy. The items suggest that it is the administrator who grants autonomy in the school context rather than the teacher who seizes it or the structure that promotes it.

A teacher's need for competence is depicted by item 79, "My students regard me with respect and seem to have confidence in my professional ability." This item is depicted as a part of the Satisfaction with Teaching factor (Bentley & Rempel, 1970). The need for relatedness is addressed in the through the Rapport with the Principal and Rapport with Teachers factors.

Many items loaded onto factors of Rapport with the Principal and Satisfaction with Teaching may actually be more indicative of teachers' fulfillment of recognition needs. For example, the statement, "my students regard me with respect and seem to have confidence in my professional ability" clearly refers to students' recognition of the teacher's ability to fulfill the role of educator.

The need for recognition is addressed in the PTO through Teacher Status, one of its ten factors. In the Purdue Teacher Opinionnaire (Bentley & Rempel, 1970), it is reflected in such items as "the lines and methods of communication between teachers and the principal in our school are well developed and maintained."

Schaer and Trentham (1986) have used the Purdue Teacher Opinionnaire (Bentley & Rempel, 1970) to draw conclusions about the importance of relatedness between teacher and students. They find that the job satisfaction component (the only factor which contains student-related items) has the strongest relationship to teachers' self-concept. The Rapport Among Teachers and Teacher Rapport with Principal subscales had large variance in the participating groups. The authors conclude their study with the following:

Teachers evidently derive greater emotional support from job satisfaction (maybe interaction of teachers and students) than from interaction of teachers and administrators. Also, a service-related hierarchy is apparently involved. Teachers are more interested in their clients' welfare than in environmental effects or their peers' and administrators' opinions (p. 955).

Although the PTO has been validated in several different studies and has an impressive overall KR reliability coefficient of .96, some possible problems in its use may exist. First, it consists of 100 items, although the manual claims it should take 20-30 minutes to complete. Lester and Bishop (1997) target a range of 40-50 items depending on the concepts to be measured, if the instrument is to be completed within 30 minutes. The return rate of a survey is related to its length (Borg and Gall, 1989). With its high reliability coefficient, accurate scores could possibly be obtained with fewer items.

Some items on the PTO are not pertinent to specific types of districts. For example, item 85 states, "As a teacher in this community my nonprofessional activities outside of school are unduly restricted." The issue of anonymity outside of the school is not particularly relevant to teachers in large districts. Another item, #98, asks the teacher to respond to whether the community expects teachers to participate in too many social activities. Both of these items are loaded under the factor Community

Pressures. It would seem more pertinent, particularly in large districts, to examine issues of accountability, budget cuts, etc., in terms of community pressures. These issues are much more prevalent in the 1990's, and they explore teachers' perceptions of what is to come.

In addition, the PTO was also developed over thirty years ago. Similar to the Staff Morale Questionnaire, the PTO's items place heavy emphasis on leadership. One-fifth of the items on the PTO relate specifically to the factor Teacher Rapport with Principal. Scoring methods allow those factors with more items to have greater influence on the overall morale score. Out of the 100 items, only five refer to students. This lack of reference to students seems puzzling considering the overwhelming majority of a teacher's day is spent with students.

Like the Staff Morale Questionnaire, the PTO fails to include the important element of motivation. It asks teachers to assess their present state; not what they see ahead. This oversight of teachers' future expectations prevents the researcher from obtaining the whole picture. In an interview with a middle school teacher (personal communication, 1997), the importance of anticipated fulfillment of needs was clearly reflected when she stated, "I think a teacher can put up with about anything if she knows it's not going to last and that things are going to get better."

There also appears to be inconsistency in what the PTO measures and its definition of morale. The authors define morale through the display of behaviors; yet, the PTO measures attitudes, not teachers' participation in specific behaviors.

Another caveat to consider in using the PTO is the invitation to false conclusions caused by overemphasis on specific factors, such as leadership. For example, norms of the PTO instrument indicate that an overall higher morale exists at the elementary level than at the secondary level. If leadership truly has the greatest influence on overall morale as asserted by many (Bentley & Rempel, 1970; Cattell & Child, 1975; Stogdill, 1959) and statistically significant differences exist at the two levels, it could be mistakenly inferred that leadership at the elementary level is more effective than leadership at the secondary level. The potential for such erroneous conclusions demands re-examination of factors emphasized in previous analyses. It calls for the development of a teacher morale instrument that puts the importance of leadership in its proper perspective and includes the most relevant factors of the teacher's job situation.

Overall, the instruments used in the past have made generalizability impossible through their use of different approaches to morale. They have also failed to include important elements of teacher morale, namely the one's outlook and reference to students. In light of the lack of generalizability, omissions, and out-dated lines of thought behind previous teacher morale research and instruments, the need for further research on teacher morale is clearly evident.

## **Implications for the Study**

### **Implications for Research**

Inconsistency in morale research has pervaded due to the lack of a solid conceptual framework. The development and use of a morale model that is used as a constant will help to avoid confusion over terms and will provide a foundation that allows for improved understanding of morale.

The morale model may also help researchers in other fields of study (e.g., industrial/organizational psychology, business administration) develop morale instruments based on a stronger theoretical foundation, reflective of both the present needs and anticipated outlook of employees.

The teacher morale instrument will also provide a tool to educational researchers as they gather information about trends and concerns in the field of teaching. Identification of the attributes of “higher morale” districts may be a useful tool in the planning process of the district.

### **Implications for Practice**

The United States is presently experiencing a serious teacher shortage. The U.S. Department of Education projects a shortage of 2.2 million teachers in the next decade (Mulrine, 1999). Retaining good teachers is a critical part of the solution to this problem. Research on teacher morale can provide guidance needed in retaining

teachers and may be used by human resource personnel in the recruitment process.

Information about teacher morale may be used in the development of district policies and procedures. Administrators may use a teacher morale instrument to identify areas in need of improvement. It may also help to modify the job design of teachers or the organizational structure of the school to better fit teachers' and students' needs. Systems of support may also be more effective once a clear understanding of teacher morale is gained.

Teacher morale also plays an important role in the financial concerns of the school district. An improved understanding of teacher morale could lead to the development of working conditions that will improve morale and lead to a stronger, more cohesive work force

The understanding of teacher morale and its components is of primary importance for teachers, students, and colleagues. When individual teachers' needs are met, growth occurs, achievement is more likely, commitment towards the organization occurs, and benefits are realized throughout the organization.



## CHAPTER THREE

### DESIGN AND METHODOLOGY

The following section will consist of two components. The first component will provide information on a pilot study I conducted as a means of gathering preliminary information needed prior to the present study. The second component will concern the design and methods of the present study.

#### **Pilot Study**

During the month of March, 1998, a pilot study was conducted with several purposes in mind.

1. To determine if a statistically significant and substantive difference between morale levels of lower and upper elementary teachers exists.
2. To determine if a teacher's forward state of mind, or outlook of the job situation, has a statistically significant and substantive relationship with teachers' morale levels.
3. To investigate the potency and relative importance of student-related items in predicting a teacher's morale level.
4. To investigate the potency and relative importance of "group cohesiveness" in predicting a teacher's morale level.
5. To construct scales, using factor analysis, which have a minimum Cronbach reliability coefficient of .60.

6. To refine the teacher morale instrument through investigation of items which may be vague or low in contribution to the overall understanding of teacher morale
7. To examine differences between teachers' perceptions of their individual morale levels and their perceptions of their colleagues' overall morale level.

### Subjects

The subjects of the pilot study were elementary teachers from pre-kindergarten through 6<sup>th</sup> grade. Three schools in the Ralston, Nebraska district, two schools in Nebraska district 66, and one school in Nebraska's Papillion-La Vista district participated. One-hundred twenty-one surveys were distributed in person to the principals of each building and returned within ten days. Ninety-five completed surveys were returned, reflecting a 79% return rate.

### Instrument

I developed an instrument to measure teacher morale (see Appendix D). The pilot study instrument contained 49 items pertaining to teachers' experiences in the workplace, and four demographic questions. The items were written to maintain consistency with my definition of morale and to the morale model I developed. My definition of morale is "a psychological state which stems from the interaction of job-related fulfillment of needs, anticipated fulfillment of needs, and perceived obstacles to needs fulfillment."

This definition was developed through extensive literature review. The items were written to indicate the meeting of human needs in several contexts. These include the teacher's perception of self, teacher-colleague relations, teacher-administrator relations, and teacher-student relations. The specific needs addressed in the instrument were autonomy, competence, relatedness, power, recognition, security, and growth. In the literature review, these needs were identified as important components of morale.

Several items were also written to indicate the teacher's job-related perceptions of the future and of obstacles to needs fulfillment. Both of these perceptions were indicated as important aspects of morale in the literature review.

The wording of 17 items were similar to items in the Purdue Teacher Opinionnaire (Bentley & Rempel, 1970). However no items were copied verbatim. Rephrasing was done either in order to enhance clarity or to simplify the statements. For example, item 82 on the PTO states "My students appreciate the help I give them with their work." A great deal of interaction between student and teacher goes beyond the assignment. I reworded the statement to "My students appreciate my efforts."

The pilot study instrument was also developed with a sense of balance in mind. Approximately the same number of items reflected the teacher's experiences with students, administration, and colleagues. The instrument was designed to prevent an overemphasis on specific administration-related issues.

Two global statements "My level of morale is high" and "The morale exhibited by my colleagues is low" were written to more clearly determine which items were

specifically related to teacher morale. Although global items like these have not been used in other teacher morale instruments, an individual should be able to determine his own morale best. In addition, participants were given space on the survey form to comment on items that seemed unclear or confusing.

### Collection of Data

I telephoned the principals of the participating schools, and explained that I was conducting a pilot study on teacher morale. I informed each principal that I would appreciate his or her school's participation and that the survey should definitely take less than twenty minutes to complete. I suggested that surveys be returned in a central locale by a key person.

Upon agreement to participate, I personally delivered a packet of surveys with cover letters in an envelope to the building administrator. Ten days later, I visited the schools and collected the surveys. Teachers' responses were entered into an SPSS database for analysis.

### Data Analysis

Item 8, "My level of morale is high" was treated as the dependent variable. Independent variables included sex, grade level taught, years of experience, education level, and factors constructed through factor analysis. These factors included an administrator-related factor, a student-related factor, a colleague-related factor, a

perception of the future factor, and a factor reflecting obstacles or pressures of the respondents' work settings. Other factors were identified through the analysis, but were not clearly interpretable. As a result, they were not used as independent variables.

The data analysis included examination of means and frequencies, multiple regression, factor analysis, discriminant analysis, examination of the alpha reliability of scales created through factor analysis, and ANOVA.

### Pilot Study Results

The pilot study indicated that a teacher's anticipation of change and future outlook are strong predictors of overall morale level. In addition, variables related to student interactions with teachers appeared to be much stronger predictors of teacher morale than administrator-related items.

When teachers were grouped by grade level, a statistically significant difference between the morale levels of upper elementary and primary teachers was found. The primary distinguishing factor that appears to account for this difference pertains to stress, workload, red tape, and other pressures of the workplace. A summary of the pilot study results is included in Appendix C.

The alpha reliability coefficient derived from the overall scale and the scales based on the factor analysis helped to support the use of the instrument in further teacher morale research. The results of the pilot appeared to warrant a larger scale investigation of teacher morale.

## **Present Study**

### Subjects

Fifty-seven public elementary schools in the Omaha, Nebraska district were asked to participate in the study. This district was selected to represent a large urban district. Classroom teachers of pre-kindergarten through sixth grade were included. Approximately 1100 surveys were distributed.

### Instrument

A teacher morale instrument based on one used in the pilot study was developed in order to measure teacher morale. The instrument was titled the “Teacher Outlook and Perceptions Survey.” Revision of the pilot study instrument consisted of the rephrasing of vague items and the omission of items decreasing reliability. For example, item 5 was reworded to “I feel pressured to skip lessons in order to be consistent with other teachers, even when my students are not ready to move on.” This rewording was meant to more clearly reflect the teacher’s perception of locus of control.

For the same reason, item 32 of the pilot study was changed to “I am given the flexibility to alter the curriculum to meet my students’ needs.” Item 18 was reworded to “Each year I teach, I look forward to trying new things in the classroom” in order to gain a stronger indication of the teacher’s future outlook.

Item 19 in the pilot study, “I enjoy learning about new teaching techniques and strategies that have been found to be effective” was removed from the instrument. It did not clearly load on to any factor and had no statistically significant relationship with a teacher’s morale level. Item 35, “My teaching position allows me a comfortable standard of living,” was also removed for the same reason.

Pilot study item 44 was changed to “I see the district placing unreasonable demands on teachers in the future.” Pilot study results indicated that 97% of the teachers see more demands being placed on them in the future. The word “unreasonable” was included to provide a clearer indication of teachers’ perceptions of future demands.

#### Procedures for Data Collection

During the month of May, 1998, principals of the selected buildings were contacted either in person or by telephone and asked to participate in the study by distributing the questionnaires to their full-time classroom teachers. It was conveyed that the survey concerns teachers’ experiences and perceptions of change in education. It was not specifically addressed as a teacher morale instrument. Bentley and Rempel (1970) suggest that use of the term “morale” in the title of an instrument can lead to bias.

A package of materials was provided to the building principal. This package included the following: a cover letter for the administrator containing instructions for distribution, a cover letter for survey respondents, survey forms, and return envelopes.

In each building, a “key” person was identified to collect the surveys for return. Surveys were returned to the researcher either by hand or through the school mail system.

### Treatment of Data

All surveys were entered into an SPSS database. A global item specifically asking teachers to indicate their morale level were treated as the dependent variable. Independent variables included sex, level of education, teacher’s grade level assignment, years of teaching experience, socioeconomic status of school, and teacher participation in grouping or departmentalization.

Factor analysis revealed factors, such as student-related items and anticipation of the job situation, which were also treated as independent variables. Factor loadings for each item were determined. Cronbach alpha coefficients for each factor and for the overall instrument were determined to assess reliability. In order to further substantiate reliability, test-retest procedures were used with one building consisting of 60 classroom teachers.

Additional multivariate statistical procedures were included in the overall analysis. These procedures included multiple regression, discriminant analysis, and



analysis of variance. An alpha level of .05 was used for all statistical tests. Cohen's  $d$  was used to determine effect size. An effect size of .20 indicated a small effect size, and thus substantiveness.

## CHAPTER FOUR

### ANALYSIS AND RESULTS

The first section of this chapter will discuss the return rate and demographic distribution of the respondents. The second section will cover the Teacher Outlook and Perceptions Survey items' associations with the dependent variable, overall morale. Factor analysis and scale development of the instrument will be reported and the research questions posed in chapter one will be addressed. Discussion of additional findings will follow.

#### Subjects

Approximately 1100 surveys were distributed to 57 elementary buildings in the participating district. The number of surveys distributed was greater than the actual number of teachers due to lack of current information on staff numbers. Extra surveys were included. In addition, library, music, physical education, and special education teachers often work for more than one building. These teachers were instructed to complete only one survey.

Of the 57 buildings invited, 41(72%) elected to participate. The decision to participate was made by the building administrator. Twenty surveys were returned with no identifiable school. They were sent directly to the University of Nebraska-Omaha through US mail. A total of 308 surveys were returned. This represents slightly over 40% of the participating buildings. Less than 10% of the respondents

were male. This distribution of sexes is fairly representative of elementary school staff composition. Table 1 presents the demographic distribution of teachers respondents across schools.

Table 1

Demographic Background of Respondents

Sex	N(%)	Age	N(%)	Education	N(%)	Overall	Current	
						Experience	N(%)	PositionN(%)
Male-	22(7)	20-30	79(26)	Bachelors	58(19)	0-5 yrs.	79(26)	0-5 yrs. 147(49)
Female-	280(93)	31-40	65(22)	Bachelors+	92(31)	6-10 yrs.	49(16)	6-10 yrs. 68(22)
		41-50	86(28)	Masters	89(30)	11-15 yrs.	43(14)	7-10 yrs. 40(13)
		51-60	67(22)	Masters+	62(21)	16-20 yrs	49(16)	11-15 yrs 47(16)
		61-70	5 (2)	Doctorate	0	21-25 yrs.	36(12)	16+ yrs.
						25+ yrs.	44(15)	

Note. Not all respondents provided demographic information.

Overall teacher morale

Nearly 82% of the respondents at least slightly agreed that their overall level of morale was high. Only about 13% of the respondents disagreed that their level of morale was high. Due to skewness, responses one through four were grouped together for further analysis. This “collapsing” of responses one through four formed four response groups: one where members did not agree that their morale level was high (N=55), one where members slightly agreed that their morale level was high (N=57), one where members mostly agreed that their level of morale was high (N=122), and one where members strongly agreed their level of morale was high (N=74). The group that did not agree that their morale level was high will be referred to as the “lowest

morale” group in reporting results of the study. The group that strongly agreed that their level of morale was high will be referred to as the “highest morale” group in reporting results of the study. This collapsed distribution will be referred to as “overall morale” in reporting results of the study. Table 2 presents the results.

Table 2  
Collapsed Distribution of Responses to the Item “My overall level of morale is high.”

<u>Extent of agreement</u>	<u>N (%)</u>
Do not agree	55(17.9)
Slightly agree	57 (18.5)
Mostly agree	122(39.6)
Strongly agree	74 (24)

ANOVA results indicated that a statistically significant and substantive difference was evident in the responses of the lowest and highest morale groups for 44 of the remaining 46 items. Of the 44 items, 32 indicated differences between the lowest and highest morale groupings within the  $p < .001$  level. Four items indicated statistically significant differences between the lowest and highest morale groupings between the .001 and .01 levels. Eight items indicated statistically significant differences between lowest and highest morale groupings between the .01 and .05 levels. All items had apparently linear relationships with morale across the four overall morale groups. These results help to support the Teacher Outlook and Perceptions Survey items’ potential worth in examining teacher morale.

Forty-four items were entered for factor analysis using the principal components method. One item related to colleagues and one item related to budget

did not have statistically significant relationships with overall morale through the ANOVA analysis. They were excluded from the factor analysis because they were not reliable predictors of overall morale in both this and the pilot study. When a varimax rotation was performed, ten factors emerged, with eigenvalues over 1.00. They accounted for 62% of the common variance. The first five had discernible themes and could be developed into scales with Cronbach reliability coefficients of .60 or above. Two other factors had distinct themes, but few items and lower alpha reliability coefficients.

#### Factor Analysis

The first factor is labeled as the “Administrative Issues” factor. Twelve items loaded on this factor with a minimum factor loading of .40. They include items 11, 12, 15, 16, 17, 21, 24, 26, 28, 30, 39, and 41. These items formed a scale with a Cronbach alpha reliability coefficient of .92. The highest loading item was 11, “The administration at this building listens and attends to my concerns.” It had a factor loading of .88. Items 30 and 39 both had factor loadings of .87. Every item on this scale resulted in statistically significant and substantive differences between the lowest and highest morale groups (Table 3). Substantive differences are defined as having effect sizes above .2, using Cohen’s measure of effect size.

Due to the large number of items that had high factor loadings on the Administrative Issues factor, the twelve items were entered for a second factor analysis. No subfactors were evident.

**Table 3**  
**Factor Analysis and ANOVA Results of Lowest and Highest Morale**  
**Group Differences for the Administrative Issues Factor and Items**

Statement	Factor Loading	Morale group		d
		Lowest M(SD)	Highest M(SD)	
1. The administration at my building listens and attends to my concerns.***	.88	4.53(2.11)	6.15(1.38)	0.93
12. My suggestions for school improvements are basically ignored.***	-.44	3.73(1.74)	2.30(1.48)	0.89
15. The administration at my building adheres strictly to discipline policies and procedures.***	.59	3.78(2.08)	5.93(1.19)	1.29
16. I am uncertain about the direction our building is heading academically.**	-.42	3.36(1.88)	2.30(1.94)	0.55
17. There is a sense of order in my building.***	.57	4.38(1.94)	6.27(1.23)	1.19
21. My principal is aware of my strengths and abilities.***	.71	4.84(1.99)	5.99(1.26)	0.71
24. In disciplinary matters, my administrator supports me.***	.79	4.82(1.94)	6.24(1.24)	0.89
26. I feel comfortable discussing school problems with my principal.***	.77	4.49(2.27)	6.01(1.49)	0.81
28. There is a sense of belonging in my school.***	.50	4.67(1.67)	6.22(0.90)	1.21
30. The principal at my building values my input on school issues.***	.87	4.33(2.02)	6.00(1.31)	1.00
39. My work is easier and more enjoyable because of my principal.***	.87	5.71(1.31)	6.91(.29)	1.50
41. My principal has realistic expectations of the teachers in this building.***	.80	4.40(2.01)	5.95(1.51)	0.88

Note.  $\alpha = .92$ , \*  $p < .05$ , \*\*  $p < .01$ , \*\*\*  $p < .001$ .

The second factor is labeled as “Student and Classroom Experiences.” Ten items loaded on this factor with a minimum factor loading of .29. These were items 4, 6, 7, 13, 29, 32, 37, 38, 42, 45. These items formed a scale with a Cronbach alpha reliability coefficient of .81. The item with the highest factor loading was # 4, “My students appreciate my efforts.” It had a factor loading of .73. Every item on the scale resulted in mean differences between the lowest and highest morale groups within the .001 level. Every item also had an effect size above .70 (Table 4).



**Table 4**  
**Factor Analysis and ANOVA Results of Lowest and Highest Morale Group**  
**Differences for the Student and Classroom Experiences Factor and Items**

Statement	Factor Loading	Morale group		d
		Lowest M (SD)	Highest M (SD)	
4. My students appreciate my efforts.***	.73	4.47(1.60)	5.99(1.33)	1.14
6. My students are achieving at what I consider their expected level.***	.65	3.91(1.80)	5.64(1.11)	1.18
7. I feel that I am successful in my teaching endeavors.***	.64	5.04(1.43)	6.54(0.65)	1.44
13. I enjoy teaching my students.***	.57	5.71(1.31)	6.91(0.29)	1.50
29. For the most part, my work with students is highly satisfying and rewarding.***	.52	5.35(1.24)	6.53(0.88)	1.11
32. I often feel that my efforts to reach my students are futile.***	-.61	3.67(1.73)	2.50(1.55)	0.71
37. I frequently feel irritated by my students' actions.***	-.66	4.29(1.89)	2.80(1.66)	0.84
38. I made the right decision in choosing a career in education.***	.40	5.00(1.53)	6.44(1.17)	1.07
42. I expect student behavior to decline in the years ahead.***	-.29	5.35(1.38)	4.14(1.95)	0.72
45. My students are generally friendly and pleasant to interact with.***	.67	5.22(1.51)	6.43(0.76)	1.06

Note.  $\alpha = .81$ , \*  $p < .05$ , \*\*  $p < .01$ , \*\*\*  $p < .001$ .

The third factor is labeled "Workload and Demands." Six items had factor loadings of at least .40. They were items 23, 25, 33, 35, 43, and 44. A scale with an alpha reliability coefficient of .79 was formed from these items. The item with the highest factor loading was item 44, "I have an unreasonable workload." It had a factor

loading of .84. Item 43, “I experience an undue amount of stress and strain from teaching,” also had a high factor loading of .74. With one exception, item 35, all items on this factor had effect sizes above .70. This overall factor showed a statistically significant difference between lowest and highest morale groups’ mean factor scores using the ANOVA procedure (see Table 10). All of this factor’s items resulted in statistically significant differences between the lowest and highest morale groups (Table 5). In addition, this factor had a statistically significant linear relationship with overall morale (see Table 11).

**Table 5**  
**Factor Analysis and ANOVA Results of Lowest and Highest Morale**  
**Group Differences for Workload and Demands Factor and Items**

Statement	Factor Loading	Morale group		d
		Lowest M (SD)	Highest M (SD)	
23. The overall morale exhibited by my colleagues seems low.***	.41	4.87(1.62)	2.23(1.46)	1.71
25. Required paperwork and red tape absorb an unreasonable amount of my time.**	.57	6.18(1.52)	5.58(1.61)	0.38
33. I have an adequate amount of planning time.***	-.72	2.45(1.83)	3.96(2.17)	0.76
35. I see the district placing unreasonable demands on teachers in the future.***	.58	6.15(1.16)	4.96(1.72)	0.83
43. I experience an undue amount of stress and strain from teaching.***	.74	5.40(1.37)	3.15(1.85)	1.40
44. I have an unreasonable workload.***	.84	5.27(1.51)	3.49(1.87)	1.05

Note.  $\alpha = .79$ , \*  $p < .05$ , \*\*  $p < .01$ , \*\*\*  $p < .001$ .

A fourth factor was indicative of perceptions of the anticipated job situation, or outlook. It is labeled as “Anticipated Outlook of the Job Situation.” Five items with factor loadings of at least .48 were formed into a scale: items 19, 20, 27, 36, and 47. These items involved proposed changes, optimism, and growth. The alpha reliability of the scale developed from these items was .74. The item with the highest factor loading was item 36, “Changes proposed for our school will do little to solve present problems” which had a factor loading of .67. Item 19, “There is little opportunity for

growth in my position,” had the second highest factor loading of .64. All five items had a moderate or larger effect size of .41 or above (Table 6).

All items with high factor loadings on the Anticipated Outlook of the Job Situation factor had statistically significant linear relationships with the dependent variable, across the four groups of overall morale. However, the mean factor scores did not indicate a linear relationship across all four groups. The second to the lowest morale group had the lowest mean factor score, and the second to the highest morale group had the highest mean factor score. When these two groups were compared through an independent *t*-test, there was a more substantive difference. The effect size was .29 and the observed significance level was .07 (see Table 10).

**Table 6**  
**Factor and ANOVA Results of Lowest and Highest Morale**  
**Group Differences for Anticipated Outlook of the Job Situation Factor Items**

Statement	Factor Loading	Morale group		d
		Lowest M (SD)	Highest M (SD)	
19. There is little opportunity for growth in my position.***	.64	3.93(1.96)	2.80(2.01)	0.57
20. I am pleased by the possible changes ahead for my school.***	-.51	4.13(1.70)	5.69(1.39)	1.01
27. The curriculum I use needs a great deal of modification.*	.48	4.65(1.70)	3.91(1.90)	0.41
36. Changes proposed for our school will do little to help solve present problems.**	.67	4.49(1.75)	3.68(1.78)	0.46
47. I am optimistic about changes in our school.***	-.55	3.85(1.76)	5.46(1.57)	0.97

Note.  $\alpha = .74$ , \*  $p < .05$ , \*\*  $p < .01$ , \*\*\*  $p < .001$

The fifth factor had only four items that loaded with factor loadings greater than .50. A scale was formed from the items which had the highest loadings. These included items 9, 10, 18, and 31. The reliability coefficient for this scale was .63. This factor is reflective of a teacher's ability to master the art of teaching through being in charge of the curriculum and being recognized for it by others. It is labeled as "Teacher Autonomy and Influence." Item 10, "I feel in charge when I teach," loaded highest on this factor. It had a factor loading of .69. Three of the four items had large effect sizes. All items showed statistically significant differences in means between the low and high morale groups (Table 7).

**Table 7**  
**Factor and ANOVA Results of Lowest and Highest Morale**  
**Group Differences for Teacher Autonomy and Influence Factor Items**

Statement	Factor Loading	Morale group		d
		Lowest M (SD)	Highest M (SD)	
9. Other teachers have utilized my ideas in their classrooms.***	.63	5.38(0.85)	6.14(0.90)	0.87
10. I feel in charge when I teach.***	.69	5.45(1.37)	6.51(0.85)	0.95
18. Each year I teach, I look forward to trying new things in the classroom.***	.56	5.65(1.11)	6.68(0.53)	1.24
31. I am given the flexibility to alter the curriculum to meet my students' needs.*	.58	5.69(1.41)	6.09(1.32)	0.29

Note.  $\alpha = .63$  \*  $p < .05$ , \*\*  $p < .01$ , \*\*\*  $p < .001$

Factor six had only two items with high factor loadings (Table 8). They were items 34 and 40. One item addressed student threats and the other concerned bickering amongst staff. This factor was labeled "Conflict." The two items could be formed into a scale with an alpha reliability coefficient of .58. Although the scale does not meet the customary .60 level of acceptability, this factor was used in further analysis because it was a reliable predictor of overall morale (see Table 12).

**Table 8**  
**Factor Analysis and ANOVA Results of Lowest and Highest Morale**  
**Group Differences for the Conflict Factor and Items**

Statement	Factor Loading	Morale group		d
		Lowest M (SD)	Highest M (SD)	
34 . Student threats to staff are a concern in my building.***	.70	3.96(2.16)	2.78(1.91)	.58
40. There is a great deal of bickering and taking sides among our staff.***	.61	3.78(1.84)	2.46(1.75)	.73

Note.  $\alpha = .58$ , \*  $p < .05$ , \*\*  $p < .01$ , \*\*\*  $p < .001$

The seventh factor also had only two items with high factor loadings. They were items 2 and 3 (Table 9). The first addressed teachers' ability to rely on colleagues. The second dealt with how closely one was supervised to assure proper adherence to procedure. Although item 3 was intended to relate to teacher autonomy, teachers with higher morale more strongly agreed that they were more closely supervised. Factor 7 was labeled as "Peer Support." The two items were combined to form a reliability scale with an alpha coefficient of .40. Although this factor had a low reliability coefficient and lack of a statistically significant relationship with overall morale, it did have a small effect size (.20 or greater) and was used in further analyses.

**Table 9**  
**Factor Analysis and ANOVA Results of Lowest and Highest**  
**Group Differences for the Peer Support Factor and Items**

Statement	Factor Loading	Morale group		d
		Lowest M (SD)	Highest M (SD)	
2. When needed, I can rely on my colleagues for assistance. **	.65	5.89(1.38)	6.50(0.80)	.56
3. I am supervised closely to ensure that I follow procedures carefully. *	.73	4.55(1.65)	5.22(1.62)	.41

Note.  $\alpha = .40$ , \*  $p < .05$ , \*\*  $p < .01$ , \*\*\*  $p < .001$

Factors 8 through 10 had no more than one item with loadings over .30 that didn't have higher loadings on other factors. Scales with coefficients over .60 could not be developed, and the factors were not used. An ANOVA analysis of the differences in means between low and high morale groups for Factors 1 through 7 is shown in Table 10. ANOVA analysis of the differences in means between low and high morale groups for Factors 8 through 10 are shown in Appedix E. None of the ten factors were correlated with each other.

In order to determine the alpha reliability coefficient of the Teacher Outlook and Perceptions Survey, negatively stated items were recoded in reverse prior to entering all items. The overall scale of this instrument resulted in a reliability coefficient of .91 (Appendix G).



**Table 10**  
**ANOVA Results of Differences in**  
**Low and High Morale Group Means for Factors 1-7**

Factor	Morale group		d
	Low M(SD)	High M(SD)	
Administrative Issues***	-0.65(1.33)	0.30(0.85)	0.87
Student and Classroom Experiences***	-0.67(1.27)	0.55(0.74)	1.21
Workload and Demands***	0.44(0.93)	-0.43(1.01)	0.90
Anticipated Outlook of the Job Situation <sup>1</sup>	0.15(0.94)	-0.11(0.87)	0.29
Teacher Autonomy and Influence***	-0.50(1.27)	0.29(0.79)	0.77
Conflict**	0.30(1.06)	-0.23(0.87)	0.55
Peer Support	-0.08(1.05)	0.14(0.94)	0.22

Note. Between groups  $df = 3$ , within groups  $df = 304$ , total  $df = 307$

\*  $p < .05$ , \*\*  $p < .01$ , \*\*\*  $p < .001$

<sup>1</sup> The two middle morale groups were compared for this factor. Although all items on this factor had a linear relationship with overall morale across the four morale groups, the factor scores did not.

Following the factor analysis and development of scales, the data were used to answer the research questions posed in Chapter 1.

Research Question One: Research question one asked “is there a statistically significant and substantive relationship between a teacher’s anticipation of the job situation and the teacher’s level of morale?”

Anticipation of the job situation is a primary defining characteristic of the morale model used in this study. It is a key in distinguishing morale from job satisfaction through inclusion of perceptions of the future in addition to the present. As noted in the preceding section, factor analysis established a five-item factor dealing with “Anticipation of the Job Situation.”

Regression analysis of the seven previously described factors, using the listwise method, demonstrated that Anticipated Outlook of the Job Situation was a reliable predictor of teacher morale when taking into account the other six factors (see Table 11). The observed significance level of the relationship between the Anticipated Outlook of the Job Situation factor and morale was .04 ( $\beta = -.09$ ).

The two items on this factor that had large effect sizes also had large factor loadings on Factor 1, Administrative Issues. The item addressing optimism had a factor loading of .52 on Factor 1, compared to its  $-0.55$  loading on Factor 4. Item 20, “I am pleased by the possible changes ahead for my school,” had a factor loading of .47 on Factor 1, compared to its loading of  $-0.52$  on Factor 4. The items’ high factor loadings on more than one factor may account for the relative weakness in Factor 4’s

independent relationship with overall morale. The sharing of items with high loadings for the Anticipated Outlook of the Job Situation factor and other factors may demonstrate the interrelationship between attitudes involving the present and future.

In order to examine the two items' worth in predicting morale a multiple regression analysis, using the listwise method, was conducted using Factors 1,2,3,5,6, and items 20 and 47 as independent variables. Initial analysis indicated great deal of sharing between items 20 and 47. To prevent this sharing, item 47 was pulled out. Item 20 was used because it had a larger effect size than item 47 (see Table 4). Item 20 was substituted for Factor 4 and the remaining factors 1-3,5, and 6 were entered. Item 20 was shown to be a reliable predictor of morale when taking into account the factors ( $p=.01$ ,  $\beta = .12$ ). The variance explained stayed the same (Table 12). Item 20 independently predicted 7% of the variance in overall morale. This was considerably more than Factor 4 independently predicted (Table 11). These results suggest that it is through one's expectation for change that anticipation of the job outlook impacts teacher morale.

**Table 11**  
**Regression Analysis Using Seven Factors as Predictors of Overall Morale**

Variable	$\beta$	Correl	Unique	T	Sig T
Administrative Issues	.34	.33	.11	8.08	.00
Student and Classroom Experiences	.42	.43	.18	10.33	.00
Workload and Demands	-.29	-.29	.08	-7.03	.00
Anticipated Outlook of the Job Situation	-.09	-.09	.01	-2.11	.04
Teacher Autonomy and Influence	.27	.26	.07	6.40	.00
Conflict	-.19	-.19	.03	-4.49	.00
Peer Support	.05	.05	.002	1.25	.21

Note. Multiple R = .70, Adjusted R<sup>2</sup> = .48, N = 308

**Table 12**  
**Multiple Regression Substituting Item 20 for Factor 4**

<u>Variable</u>	<u><math>\beta</math></u>	<u>Corr</u>	<u>Unique</u>	<u>T</u>	<u>SigT</u>
Administrative Issues	.28	.33	.11	5.86	.00
Student and Classroom Experiences	.41	.43	.17	9.88	.00
Workload and Demands	-.27	-.29	.07	-6.38	.00
Pleased by Changes (Item 20)	.12	.38	.07	2.56	.01
Teacher Autonomy and Influence	.25	.26	.06	6.12	.00
Conflict	-.18	-.19	.03	-4.49	.00
Peer Support	.05	.05	.002	1.17	.24

Note. Multiple R = .70, Adjusted R<sup>2</sup> = .48, N = 308

The Anticipated Outlook of the Job Situation factor independently predicted only about one percent of the variance in overall morale (Table 11). This suggests that the factor is a much weaker predictor than the other factors. However, this conclusion may be inaccurate because the factor scores didn't have a linear relationship with overall morale across the four morale levels. It is unclear why the factor scores failed to have a linear relationship with overall morale across the four levels when all of the items that contributed to the factor did. Considering that regression analysis measures the potency of linear relationships, this method may not have been the best for assessing the relationship between one's anticipation of the job situation with morale.

A regression analysis using the five items which contributed the most to the Anticipated Outlook of the Job Situation factor was conducted to more accurately

answer the research question. When examining the five items' ability to predict overall morale in a regression analysis, using the listwise method, results were quite different. Together, the five items accounted for nearly 17% of the variance in overall morale (Table 13). Item 27, "The curriculum I use needs a great deal of modification," is not a reliable predictor of overall morale when taking into account the other Factor 4 items. This suggests that there is a stronger relationship between anticipation of the job situation and the teacher's level of morale when anticipation of the job situation is defined by the changes one expects.

**Table 13**  
Anticipated Outlook of the Job Situation Factor  
Items Used as Predictors of Overall Morale

<u>Variable</u>	<u><math>\beta</math></u>	<u>T</u>	<u>Sig T</u>
The curriculum I use needs a great deal of modification.	.05	.92	.34
There is little opportunity for growth in my position.	.14	2.39	.02
I feel optimistic about changes ahead.	.20	2.70	.01
I am pleased by changes proposed for our school.	.24	3.39	.00
Proposed changes will do little to solve present problems.	-.07	-1.12	.26

Note. Multiple R = .43, Adjusted R<sup>2</sup> = .17, N = 308

Research Question Two: Research question two asked “is there a statistically significant and substantive difference between lower and upper elementary teachers’ morale levels? If so, what accounts for these differences?”

Careful consideration of grouping is important in the comparison of the overall morale levels of the teachers of specific grade levels. The grade level with the lowest means for overall morale was pre-K. However, only seven pre-Kindergarten teachers responded, and pre-Kindergarten is offered only to students in low socioeconomic schools. This group of teachers was not used in the comparative analysis.

Kindergarten through 3<sup>rd</sup> grade teachers were grouped together and 4<sup>th</sup>-6<sup>th</sup> grade teachers were grouped together. As shown in Table 12, upper elementary teachers generally had lower overall morale, but statistical comparison (not shown in the table) of Kindergarten-3<sup>rd</sup> grade means and 4<sup>th</sup>-6<sup>th</sup> grade means showed that the difference was not statistically significant ( $t = 1.09$ ,  $p = .28$ ). Fifth grade teachers had the lowest morale mean. Kindergarten teachers had the highest overall morale level.

Due to the inconsistent return rate from building to building, very few schools which had return rates of over 35% had substantial representation of both lower and upper elementary teachers. Several schools in the study were exclusively primary or upper elementary. Only three schools with both upper and lower elementary teachers had return rates over 70%. Of those three, no pattern between lower and upper elementary levels was discernible. In two of the schools, upper elementary teachers had statistically significant higher morale levels. There was a small effect size in the

difference between lower and upper elementary teachers' overall morale levels for one building and a large effect size for the other.

The third building that indicated a statistically significant difference between lower and upper elementary teachers' overall morale level indicated that lower elementary teachers had lower morale. The effect size for the differences in this building was medium.

Table 14  
Overall Morale Means by Grade Level

	M	SD	N
Pre-Kindergarten	5.14	1.68	7
Kindergarten	5.82	1.65	22
First grade	5.40	1.59	45
Second grade	5.52	1.36	31
Third grade	5.69	1.29	26
Fourth grade	5.41	1.25	27
Fifth grade	5.24	1.77	49
Sixth grade	5.39	1.61	31

Note. 5 = slightly agree, 6 = mostly agree.

Research Question Three: Research question three asked “is there a statistically significant and substantive relationship between student-related issues and a teacher’s overall morale level? If so, does the student factor predict a teacher’s morale level better than leadership factors?”



Factor analysis produced a factor, Factor 2, which was clearly indicative of student-related experiences in the classroom. This Student and Classroom Experiences factor did have a statistically significant and substantive relationship with overall morale. Of the seven factors, it had the largest effect size (Table 10).

Past research on teacher morale has de-emphasized student and classroom experiences in favor of focus on leadership. In the present study, the Administrative Issues and Student and Classroom Experiences factors together explained over one-fourth of the variance in overall morale. Regression analysis and partitioning indicated that Student and Classroom Experiences was a stronger independent predictor of overall morale. It independently accounted for 62% of the variance explained in teacher morale, while Administrative Issues accounted for 38 % of the variance explained (see Table 15). The results also indicate that there is no apparent sharing between the two factors, which is not surprising since they were produced by varimax rotation.

Thus, there is a statistically significant and substantive relationship between student-related experiences and a teacher's overall morale level, and the student-related factor is a better independent predictor of overall morale than is the administrative factor. The pilot study produced similar results, with the student factor being a stronger independent predictor of overall teacher morale than administrative-related items. In light of this, surveys intended to examine teacher morale should include items which reflect teachers' experiences with their students.

**Table 15**  
**Regression Analysis Using Administrative Issues**  
**and Student and Classroom Experiences as Predictors of Overall Morale\***

Variable	$\beta$	Uniqueness	T	Sig T
Administrative Issues	.33	.11	6.91	.00
Student and Classroom Experiences	.43	.18	8.84	.00

Note. Multiple R = .54, Adjusted R<sup>2</sup> = .29, N = 308

**Research Question Four:** Research question four asked “are the morale levels of lower and upper elementary teachers influenced differently by student-related factors?”

In order to examine differences between lower and upper elementary teachers’ experiences with students, two multiple regressions, using the listwise method, were conducted using Student and Classroom Experiences factor items as independent variables predicting overall morale (Table 16). The first regression analysis included only Pre-K-3<sup>rd</sup> grade teachers. The second regression analysis included only 4<sup>th</sup>-6<sup>th</sup> grade teachers. Some distinctive differences were evident when the two analyses were compared. Approximately 35% of the variance in lower elementary teachers’ overall morale was explained by the ten Student and Classroom Experiences items. The same items explained 47% of the overall morale of the upper elementary teachers. This suggests that the morale of upper elementary teachers is more strongly related to student-related experiences when compared to lower elementary teacher morale.

**Table 16**  
**Comparison of Lower and Upper Elementary Multiple Regression Analyses Using**  
**Student and Classroom Experiences Factor Items as Predictors of Overall Morale**

Variable	<u>β</u>		<u>T</u>		<u>Significance of T</u>	
	Lower	Upper	Lower	Upper	Lower	Upper
My students appreciate my efforts.	.02	.10	.22	1.06	.83	.29
My students are achieving at what I consider their expected level.	.03	.20	.35	2.02	.73	.05
I enjoy teaching my students.	.18	.28	1.94	3.22	.05	.002
I made the right decision in choosing a career in education.	.22	.11	2.56	1.19	.01	.24
My students are generally friendly and pleasant to interact with.	.16	.10	1.81	1.04	.07	.30
I frequently feel irritated by my students' actions.	-.10	-.07	-1.06	-.89	.29	.38
For the most part, my work with students is highly satisfying and rewarding.	.004	-.02	.04	-.20	.97	.84
I often feel that my efforts to reach my students are futile.	.05	.12	.57	1.43	.57	.16
I feel successful in my teaching endeavors.	.21	.28	2.21	2.66	.03	.01
I expect to see behavior decline in the years ahead.	-.06	.01	-.78	.08	.44	.94
	<u>Multiple R</u>		<u>Adjusted R<sup>2</sup></u>		<u>N</u>	
Lower	.63	.35	131			
Upper	.72	.47	107			

Many items were not strong predictors of overall morale when taking into account the other Student and Classroom Experiences factor items. This may be attributed to a strong correlation between items. However, several noted differences between the grade levels were evident. Student achievement appeared to be much more strongly related to upper elementary teacher morale than to lower elementary teacher morale. Teacher success was also more strongly related to upper elementary teachers' morale levels. The strongest predictor of lower elementary teacher morale was item 38, "I made the right decision in choosing a career in education." This item was not a reliable predictor of upper elementary teacher morale. Student friendliness may also be a reliable predictor of lower elementary teacher morale but not a reliable predictor of upper elementary teacher morale.

A second set of multiple regression analyses was conducted to investigate whether or not the Student and Classroom Experiences factor predicts lower and upper elementary teacher morale differently when taking into account the other factors. When taking into account the seven factors, Student and Classroom Experiences accounted for the same amount of explained variance in overall morale for lower and upper elementary teachers.

What does stand out in this second comparative analysis is the difference in explained variance attributed to Administrative Issues. The results suggest that upper elementary teachers' morale levels are not as dependent on Administrative Issues and that lower elementary teachers' morale is more strongly related to Administrative

Issues. Administrative Issues independently explains 14% of the variance in lower elementary teachers' overall morale. However, the Administrative Issues factor only independently explains 2% of the unique variance in upper elementary teachers' overall morale.

**Table 17**  
**Comparison Multiple Regression Analyses Using Factors 1-7 as**  
**Predictors of Overall Morale for Lower and Upper Elementary Teachers**

Variable	$\beta$		Corr		Unique		T Score		Sig T	
	Lower	Upper	Lower	Upper	Lower	Upper	Lower	Upper	Lower	Upper
Administrative Issues	.42	.16	.38	.25	.14	.02	6.68	2.14	.00	.03
Student and Classroom Experiences	.47	.47	.43	.51	.22	.22	7.46	6.71	.00	.00
Workload and Demands	-.34	.20	-.33	-.27	.11	.04	-5.35	-2.86	.00	.00
Anticipated Outlook of the Job Situation	-.06	-.11	.01	-.13	.003	.01	-0.88	-1.59	.38	.12
Teacher Autonomy and Influence	.26	.26	.11	.39	.06	.06	4.02	3.53	.00	.00
Conflict	-.12	-.26	-.14	-.24	.01	.06	-1.90	-3.63	.06	.00
Peer Support	.01	-.01	-.01	-.04	.00	.00	.23	-0.16	.82	.87
	<u>Multiple R</u>		<u>Adjusted R<sup>2</sup></u>		<u>N</u>					
Lower	.72		.49		131					
Upper	.72		.48		107					

T-tests were used to analyze differences between the two groups' means on the Student and Classroom Experiences factor. There appears to be a statistically significant difference between lower and upper elementary teachers' experiences with their students. Analysis of the relationship between grade and Factor 2, Student and

Classroom Experiences, showed that primary teachers have an overall more positive experience with students than upper elementary teachers (Table 18).

**Table 18**  
**T-test Results for Lower and Upper**  
**Elementary Teachers Factor Scores on Student and Classroom Experiences Factor**

Grade Level		d	p
Pre-K-3 <sup>rd</sup> (N=131)	4 <sup>th</sup> -6 <sup>th</sup> (N=107)		
.18(0.96)	-0.11(1.06)	.28	.03

Individual analyses of items with high factor loadings on the Student and Classroom Experiences factor more precisely show what may account for the differences in the factor scores of lower and upper elementary teachers. For example, *t*-tests on items 6 and 7 indicate that lower elementary teachers have a more positive sense of achievement and success in their jobs than do upper elementary teachers (Table 19).

**Table 19**  
**Comparisons of Lower and Upper Elementary Means on**  
**Selected Student and Classroom Experiences Factor Items**

Statement	Grade Level		d
	Pre-K-3 <sup>rd</sup> (N=124) M(SD)	4 <sup>th</sup> -6 <sup>th</sup> (N=107) M(SD)	
My students are achieving at their expected level. **	5.13(1.49)	4.60(1.52)	0.35
I feel that I am successful in my teaching endeavors.*	6.06(0.93)	5.78(1.12)	0.27
My students are generally friendly and pleasant to interact with. *	6.02(1.04)	5.74(1.18)	0.25
I expect student behavior to decline in the years ahead.	4.34(1.91)	4.72(1.70)	0.21

Note. \*  $p < .05$ , \*\*  $p < .01$ , \*\*\*  $p < .001$

Two items which were not included in the Student and Classroom Experiences factor due to their relatively low loadings also showed statistically significant and substantive differences between grade levels (Table 20). The items addressed plan time and a teacher's sense of comfort in discussing classroom problems with the administrator. Lower elementary teachers indicated greater satisfaction with the amount of time allotted for planning though neither level agreed that they had enough plan time on the average. Upper elementary teachers indicated that they feel more comfortable with their administrators than do lower elementary teachers. A tendency for upper elementary students to exhibit more outward behaviors that call for administrative assistance may account for this difference.

**Table 20**  
**Comparison of Lower and Upper Elementary Means on Selected**  
**Items not Included on the Student and Classroom Experiences Factor**

Statement	Grade Level		d
	Pre-K-3 <sup>rd</sup> (N=124)	4 <sup>th</sup> -6 <sup>th</sup> (N=107)	
I have an adequate amount of planning time.*	M(SD) 3.56(2.04)	M(SD) 2.92(1.89)	0.32
I feel comfortable discussing classroom concerns with my principal.*	M(SD) 5.32(1.80)	M(SD) 5.79(1.49)	0.28

Note. \*  $p < .05$ , \*\*  $p < .01$ , \*\*\*  $p < .001$

Fifth grade contrasts. On a large number of the survey items, fifth grade teachers had less positive perceptions compared to all other grades. Fifth grade teachers indicated a lower sense of achievement, less success, less friendliness exhibited by students, a greater sense of futility, and less positive perceptions of the administrator's expectations of staff and adherence to discipline policy. Although not all differences were statistically significant, the differences for seventeen items had at least small to moderate effect sizes, and thus are reported in the analysis (Table 21).



**Table 21**  
**Contrasts of Fifth Grade Teachers' Responses to**  
**Teacher Outlook and Perceptions Survey Items Compared to Other Grade Levels**

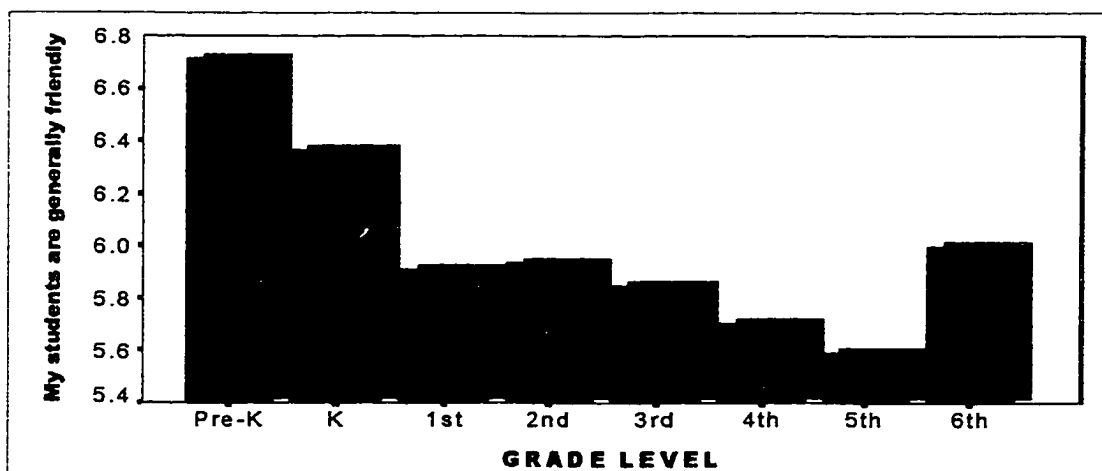
Item	Fifth grade M(SD) N=49	All other grades M(SD) N=189	d	p
5. My students are achieving at what I consider their expected level.	4.55(1.61)	4.98(1.49)	.28	.08
12. My suggestions for school improvements are basically ignored.	3.33(1.68)	2.93(1.64)	.24	.13
14. There are teachers in my building that I consider close friends.	5.89(1.44)	6.27(1.10)	.30	.09
15. The administration at my building adheres strictly to discipline policies and procedures	4.49(1.89)	5.28(1.65)	.45	.01
16. I am uncertain about the direction our building is heading academically.	3.37(2.01)	2.74(1.86)	.33	.04
19. There is little opportunity for growth in my position.	3.76(2.13)	3.14(1.97)	.30	.06
21. My principal is aware of my strengths and abilities.	5.59(1.49)	5.96(1.08)	.29	.06
24. In disciplinary matters, my administrator supports me.	5.41(1.54)	5.80(1.47)	.26	.10
32. I often feel that my efforts to reach my students are futile.	3.78(1.77)	3.04(1.96)	.40	.004
33. I have an adequate amount of planning time.	2.65(1.70)	3.56(2.04)	.49	.02
35. I see the district placing unreasonable demands on teachers in the future.	5.98(1.32)	5.51(1.41)	.34	.04
36. Changes proposed for our school will do little to help solve present problems.	4.42(1.62)	3.94(1.56)	.31	.06
41. My principal has realistic expectations of the teachers in this building.	4.96(1.74)	5.64(1.50)	.42	.01
42. I expect student behavior to decline in the years ahead.	5.02(1.73)	4.38(1.83)	.36	.03
43. I experience an undue amount of stress and strain from teaching.	4.65(1.86)	4.23(1.74)	.23	.14

**Table 21 (continued)**  
**Contrasts of Fifth Grade Teachers' Responses to**  
**Teacher Outlook and Perceptions Survey Items Compared to Other Grade Levels**

Item	Fifth grade M(SD) N=49	All other grades M(SD) N=189	d	p
44. I have an unreasonable workload.	4.71(1.72)	4.25(1.78)	.26	.10
45. My students are generally friendly and pleasant to interact with.	5.59(1.46)	5.97(0.99)	.31	.09

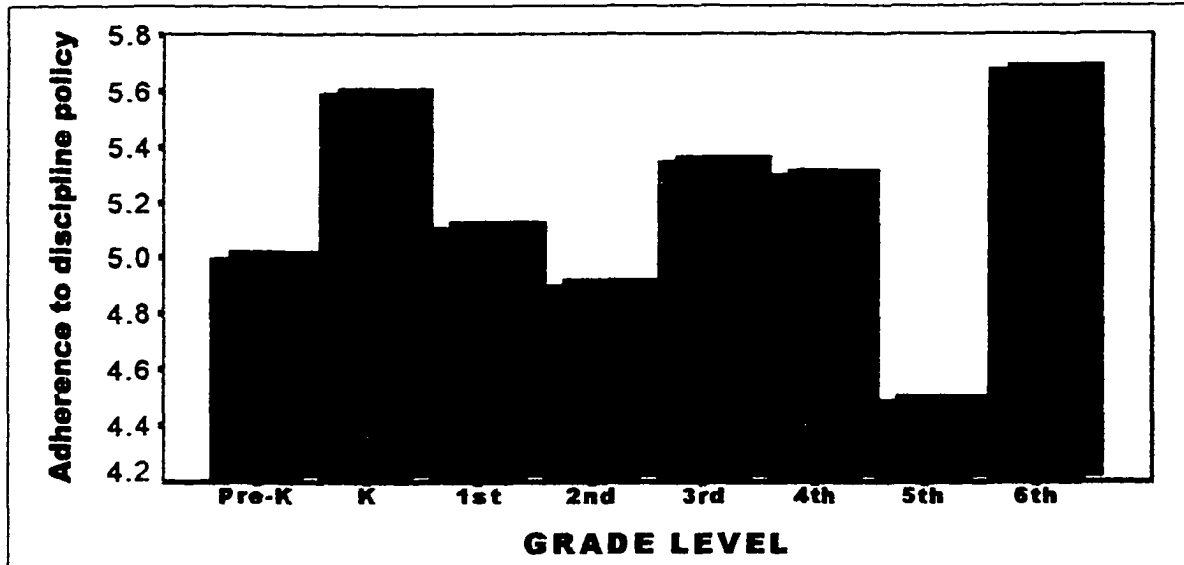
In some cases, it appears that a decline in positive experience occurs from the primary grades through grade five, and then in sixth grade, there is a shift toward a more positive perception of experiences (see Figures 1-3). For example, positive responses to "My students are generally friendly and pleasant to interact with," steadily decline, "bottoming out" at fifth grade and then taking an upward turn in sixth grade.

**Figure 1**  
**Grade Level Response Means to the Item "My students are generally friendly and pleasant to interact with."**



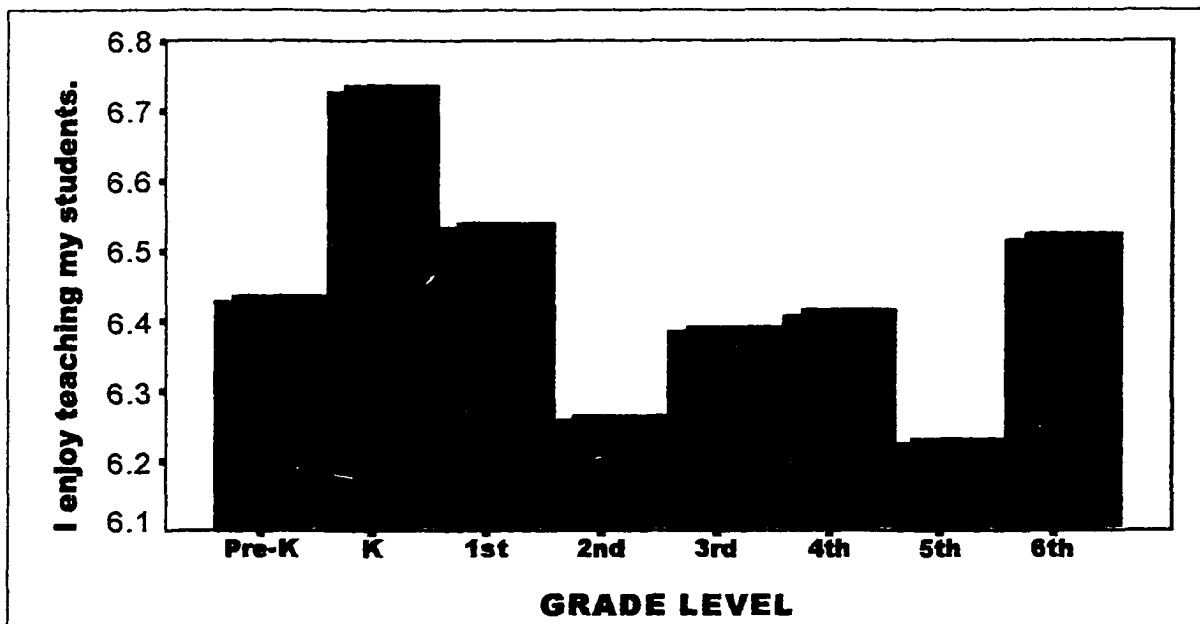
**Figure 2**

**Grade Level Response Means to the Item “The administration in our building adheres strictly to discipline policy.”**



**Figure 3**

**Grade Level Response Means to the Item “I enjoy teaching my students.”**



Departmentalization was examined as one possible explanation for this difference. A much larger number of sixth grade teachers participate in departmentalization, such that they do not have the same students the whole day. However, when the means between fifth and sixth grade teachers who departmentalize were compared to the means of fifth and sixth grade teachers who don't departmentalize, there was no statistically significant or substantive difference in overall morale (not shown in table).

#### Predicting Classification of Low Morale

One of the most potentially valuable uses of the teacher morale instrument is in identifying teachers who have low morale. The assumption behind this is that problems are more likely to be associated with low morale than with higher morale. A discriminant analysis was conducted in order to discover how accurately the seven factors predicted lower overall morale and higher overall morale. The three higher morale groups were recoded and grouped together to form one large group that at least slightly agreed that their overall morale level was high (N = 255). When the seven previously discussed factors were entered as variables to predict classification, nearly 75% of the low morale group respondents was correctly classified. Nearly 83% of the higher group was correctly classified (table not shown).

In an attempt to even more accurately predict teacher morale classification, the Anticipated Outlook of the Job Situation factor was substituted with item 47, "I feel

optimistic about changes ahead.” In exploratory discriminant analyses, this item helped predict classification better than item 20, “I am pleased about possible changes ahead at my school.” Substitution of these items was discussed earlier. Factor 7, Peer Support was also removed from the analysis. Compared to the other six factors, it was a weak predictor of overall morale. When factors 1-3,5,6 and item 47 were entered, the accuracy in predicting low group membership improved from nearly 75% to 80% (Table 22).

Table 22  
Discriminant Analysis Using Factors One  
Through Seven To Classify Low Morale and High Morale

Standardized Canonical Discriminant Function Coefficients

Administrative Issues	.47
Student and Classroom Experiences	.61
Workload and Demands	-.38
Optimism (Item 47)	.28
Teacher Autonomy and Influence	.48
Conflict	-.29

Classification Results

Actual Group	No. of Cases	Predicted Group Membership	
		Morale Group	
		Low	High
Low Morale	55	44 80%	11 20%
High Morale	253	42 16.6%	211 83.4%

Note: Percent of "grouped" cases correctly classified: 82.79%

Further examination was conducted to see if any combination of specific items could more accurately predict morale level classification. When entered as predictors,

items 7, 13, 17, 38, 42 accurately predicted nearly 82% of the low morale cases and nearly 88% of the higher morale cases (Table 23).

Table 23  
Discriminant Analysis Using Specific  
Items to Classify Low Morale and High Morale

Canonical Discriminant Function

<u>Function 1</u>	
I made the right decision in choosing a career in education.	.28
I enjoy teaching my students.	.28
I feel that I am successful in my teaching endeavors.	.49
I experience an undue amount of stress and strain from teaching.	-.23
There is a sense of order in my building.	.52

Classification Results

<u>Actual Group</u>	<u>N</u>	<u>Predicted Group Membership</u>	
		<u>Low</u>	<u>High</u>
Low morale	55	45 81.8%	10 18.2%
High morale	253	31 12.3%	222 87.7%

Note: Percent of "grouped" cases correctly classified: 86.69%

### Teacher Morale and Effective School Corellates

Research on unusually effective schools lists several conditions and practices that contribute to school effectiveness. Among these are an orderly environment, maximum amount of time used for instruction, and continuous monitoring of student progress (Levine & Lezotte, 1990).

Many items on the Teacher Outlook and Perceptions Survey refer to effective school correlates. Examination of these items' relationship with overall teacher morale should contribute to the understanding of the symbiotic relationship between the two. It may be impossible to determine if positive teacher morale results in an unusually effective school or if the reverse occurs. However, it is important to recognize that when one element moves in a more negative direction the other will likely follow.

Teacher Success. Of all the items in the Teacher Outlook and Perceptions Survey, the one concerning teachers' success in their efforts was one of the most strongly related to overall morale level. It had an effect size of 1.41. This is a critical finding to consider as organizational change occurs. Although it can't be determined from these data the extent to which success leads to improved morale or higher morale precedes a greater sense of success, the strong relationship supports the need to create the conditions for both teacher effectiveness and higher morale.

Order. Item 17, "There is a sense of order in my building," also had a very large effect size ( $d = 1.14$ ). An orderly environment is not only a reliable predictor of

teacher morale, it is generally the first component that must be in place for effective implementation of programs (Levine & Lezotte, 1990).

The Administrator as a "Buffer." Research on unusually effective schools urges the need for strong leadership. Many schools experiencing problems have been turned around by a "maverick" principal, one who acts as a buffer between the teaching staff and the central administration. Although 80% of the respondents anticipated the district placing unreasonable demands on them in the future, nearly the same percentage felt that their principal had realistic expectations of them. From these results, it could be interpreted that either the respondents' principals do not have the same expectations as central administration, or that teachers perceive expectations less negatively when mediated by the principal. If the latter is true, then it may suggest that many of the respondents' principals serve as a buffer between the central administration and the teaching staff.

In order to examine the potential potency of this buffer condition, numerical responses to items 35 and 41 were multiplied to produce products ranging from 1 to 49 which represented a teacher's leaning toward a more favorable perception of the principal or a more favorable perception of the district. For example, if a teacher strongly disagreed that the district placed unreasonable demands on teachers and strongly disagreed that the principal had realistic expectations, the product of the two responses was "1". If a teacher strongly agreed that the principal had realistic expectations of teachers and strongly agreed that the district had unreasonable



demands, then the product of the two responses was “49.” Products larger than 15 indicated a comparatively favorable sentiment toward the principal in the context of job expectations. Products less than 12 indicated a comparatively favorable perception of the district in the context of job expectations. Products of 12-15 indicated similar perceptions of the district demands and principal expectations.

ANOVA analysis determined that there were one or more statistically significant differences in the buffer scores among any of the four morale groups. Using the Student-Newman-Keuls range test, further examination showed that there was a statistically significant and substantive difference in buffer variable scores for the low morale group and the second highest morale group (Table 24).

Table 24  
ANOVA Results of Differences in  
Low and the Second Highest Morale Group Means for the Buffer Variable

Morale group					
Lowest		Second Highest		d	p
N	M(SD)	N	M(SD)		
55	26.65(13.76)	122	31.86(10.0)	.44	.01

Comparison of morale means between teachers having a more favorable perception of principal expectations and teachers having a more favorable perception of district expectations showed that there was a statistically significant and substantive difference (Table 25).

Table 25T-test Results Comparing Overall Morale Means by Buffer

<u>Variable</u>	<u>N</u>	<u>M</u>	<u>SD</u>
Favoring District	28	5.71	1.51
Favoring Principal	280	6.54	1.08

Note. \*  $p = .01$ ,  $d = .63$

The Relationship Between SES and Teacher Morale

There has been some research suggesting that there is a strong relationship between the socioeconomic status of the pupils in a school and teacher morale (Reyes, 1983). In order to develop a variable representing the percentage of low-income students in each respondent's school, district data indicating the percentage of students participating in the free or reduced lunch program were entered for each case. Separate variables for free, reduced, and combined were included. Although none of the three variables had strong relationships with overall morale, the observed significance level for combined (percentage of students who participate in either free or reduced lunch program) was lower. The combined value was used and labeled "SES."

In the early stages of this study, it was uncertain whether district data on free and reduced lunch participation would be available. As a means of obtaining an estimate of each elementary school's socioeconomic composition, I provided the names of the district's elementary schools to a teacher who has been a lifelong resident of the district. Schools were ranked on a scale of one to ten. High poverty schools

were given a ranking of one, while schools in higher income areas were given a ten. When actual district data were available, the correlation between the estimated SES and the district SES variables was  $-.86$ . Comparison of listwise regression analyses using Factors 1-6 with both SES variables is provided (Table 26).

In both regressions, when Factors 1-6 were entered into the analysis with the variable representing percentage of low-income students (free and reduced combined), the variance that had been previously explained by the seven factors alone (see Table 11) increased by less than one-half a percentage point (Table 26). The SES variable based on district data did have a statistically significant relationship with overall morale when taking into account the six factors. However, the effect size was small ( $\beta=.09$ ).

The strong similarity in results suggests that estimated socioeconomic status of a school can in some cases be a viable alternative to actual district data.

▼

**Table 26**  
**Comparison of Multiple Regression Analyses Using Six Factors and**  
**District SES Data with Six Factors and SES Data as Estimated by Lifelong Resident\***

Variable	$\beta$		Corr		Uniqueness		T		p	
	1 <sup>st</sup>	2 <sup>nd</sup>	1 <sup>st</sup>	2 <sup>nd</sup>	1 <sup>st</sup>	2 <sup>nd</sup>	1 <sup>st</sup>	2 <sup>nd</sup>	1 <sup>st</sup>	2 <sup>nd</sup>
Administrative Issues	.29	.29	.31	.31	.09	.10	6.73	6.65	.00	.00
Student and Classroom Experiences	.47	.46	.45	.45	.21	.20	10.61	10.42	.00	.00
Workload and Demands	-.30	-.31	-.30	-.31	.09	.10	-7.01	-7.14	.00	.00
Anticipated Outlook of the Job Situation	-.06	-.06	-.06	-.05	.003	.003	-1.37	-1.28	.17	.20
Teacher Autonomy And Influence	.20	.22	.25	.25	.06	.06	5.19	5.10	.00	.00
Conflict	-.22	-.24	-.19	-.20	.03	.04	-5.07	-5.28	.00	.00
District SES	.09		-.05		.01		2.07		.04	
Estimated SES		-.08		.08		.01		-1.66		.10

**\*Multiple R    Adjusted R<sup>2</sup>**

1 <sup>st</sup> analysis	.70	.48
2 <sup>nd</sup> analysis	.70	.48

What is particularly interesting about the regression analyses in Table 26 is that when compared to the regression analysis using only the seven factors as independent variables (see Table 11), the SES variable decreased the unique variance explained by all factors except for the Student and Classroom Experiences factor. One might expect that the SES variable would share with the Student and Classroom Experiences factor

because the SES variable is based on student information. In addition, there are many implications for instruction and achievement based on the percentages of low-income students. In this study, the SES variable appears to be more closely associated with teachers' feeling a greater workload and not a negative perception of the students. The school and the job may be perceived as "tougher," – not necessarily the students.

An ANOVA analysis was also conducted to see if there was a statistically significant or substantive difference in the socioeconomic status of the schools for any of the four morale groups. No statistically significant or substantive differences were found ( $p = .57$ ). This suggests that the socioeconomic composition of an elementary school is not a strong predictor of overall morale by itself.

#### Age of Teachers, Morale, and the Myth of the Disgruntled Teacher

When concern about "teacher burnout" first became an area of study, a great deal of attention was given to the aging teacher. Titles such as "How to Keep an Aging Teacher Alive," give the reader the impression that teachers with more years of experience have lower morale due to years of endless battle.

Smith (1979) found that generally there are no statistically significant differences between the morale levels of younger and older teachers. However, when a difference does exist, it is younger teachers who possess lower morale. In the literature review for this study, it was suggested that the difference may lie in the morale model used by Smith. It relies heavily on collegiality, and teachers who have been in a

building for many years may have developed a stronger support system within the school climate. However, this present study resulted in similar findings even though the morale model was not based on collegiality.

An ANOVA analysis was conducted to determine if there were any statistically significant differences in ages of the four morale groups. No statistically significant differences were found ( $p = .40$ ). Similar results occurred when years of experience was entered as the dependent variable ( $p = .49$ ).

One possible explanation for the tendency of teachers with more years of experience having higher morale than expected is the possibility that by a certain time in one's career, teachers with lower overall morale have exited the profession. Another possibility is a tendency for teachers with more experience to transfer to schools with a smaller percentage of low-income students. Data results suggest that this may be a plausible explanation. Younger teachers tend to be in schools with a higher concentration of low-income students. Although the relationship is neither strong nor strongly reliable ( $p = .08$ ), these findings may warrant further examination.

Analyses were conducted to determine if any differences in factor scores were evident between younger and older teachers. The Workload and Demands factor was the only factor that resulted in a statistically significant difference between older and younger teachers. It appears that older teachers perceive their workload more negatively than younger teachers. In light of the findings in this study efforts should be made to dispel the inaccurate stereotypes of the older, disgruntled teacher.

### The Appropriateness of the Human Needs Model in Studying Morale

The development of a morale model was necessary before a valid instrument could be developed. A human needs approach to explaining morale has been introduced by Evans (1996), but no statistical evidence substantiating this approach has been provided. Lester's (1980) Job Satisfaction Index uses a human needs model based on the works of Herzberg and Maslow, but no reference to the anticipated fulfillment of needs is addressed.

The items created for the Teacher Outlook and Perceptions Survey were based on a morale model. This model includes three components: 1) needs; 2) obstacles to those needs; and 3) one's perception of future meeting of needs (see Appendix A).

In order to examine the appropriateness of the human needs model's application to morale and the definition provided, interpretation was used to identify the instrument's items' reflection of a specific need. Items that appeared to relate to the same need were entered together to examine their potential for forming a reliable scale. For example, items 6, 7, and 32 involve one's need for competence. When entered for scale analysis, they were formed into a scale with an alpha reliability coefficient of .67.

Several items pertained to obstacles, one component of the morale model. Another group of items, mostly those from the Anticipated Outlook of the Job Situation Factor, reflected the morale model's component of anticipated fulfillment of needs. The only component of the morale model with a low alpha reliability was

“Autonomy.” A larger sample group may be needed before more accurate analysis can be conducted. Table 27 presents the items and the underlying need or other component of the morale model presented for the study. Scale information for each component of the morale model is also provided.

It should be noted that the morale model used in this study has not been used in previous morale research. Thus, a great deal of the examination, interpretation, and classification of items as fitting under a human needs theme is exploratory. Several items did not fit clearly on any needs scale. In a few cases, certain items could be interpreted as pertaining to more than one specific need. For example, item 21, “My principal is aware of my strengths and abilities,” could be related to the teacher’s need for recognition or to the teacher’s rapport with the principal (relatedness). Scale reliability should help to support the contention that a specific theme (a specific component of the morale model) lies within the items used in scale.



Table 27

Scales Developed from Items Connected to Specific Human Needs

<u>Need</u>	<u>Items</u>	<u><math>\alpha</math></u>
<u>Autonomy</u> –		.42
	I feel in charge when I teach.	
	I am given the flexibility to alter the curriculum to meet my students' needs.	
	I see the district placing unreasonable demands on teachers in the future.	
	Required paperwork and red tape absorb an unreasonable amount of my time.	
<u>Competence</u> –		.67
	My students are achieving at what I consider their expected level.	
	I feel that I am successful in my teaching endeavors.	
	I often feel that my efforts to reach my students are futile.	
<u>Relatedness</u> –		.67
	There are teachers in my building that I consider close friends.	
	There is a sense of belonging in my school.	
	For the most part, my work with students is highly satisfying and rewarding.	
	My work is easier and more enjoyable because of my principal.	
	There is a great deal of bickering and taking sides among our staff.	
	My students are generally friendly and pleasant to interact with.	
	I feel comfortable discussing school problems with my principal.	
	I enjoy teaching my students.	
<u>Power</u> –		.63
	I often feel that my efforts to reach my students are futile.	
	The principal at my building values my input on school issues.	
	In disciplinary matters, my administrator supports me.	
	I feel in charge when I teach.	
	My suggestions for school improvements are basically ignored.	
<u>Growth</u> –		.62
	I am uncertain about the direction our building is heading academically.	
	Each year I teach, I look forward to trying new things in the classroom.	
	I am pleased by the possible changes ahead for my school.	
	Changes proposed for our school will do little to help solve present problems.	

Table 27

Scales Developed from Items Connected to Specific Human Needs (cont.)

<u>Need</u>	<u>Items</u>	<u><math>\alpha</math></u>
<u>Security-</u>		.72
	When needed, I can rely on my colleagues for assistance.	
	The administration at my building adheres strictly to discipline policies and procedures.	
	There is a sense of order in my building.	
	In disciplinary matters, my administrator supports me.	
	Student threats to staff are a concern in my building.	
 <u>Recognition-</u>		 .71
	The administration at my building listens and attends to my concerns.	
	My principal has realistic expectations of the teachers in this building.	
	Other teachers have utilized my ideas in their classrooms.	
	My principal is aware of my strengths and abilities.	
 <u>Obstacles-</u>		 .64
	My teaching is limited by budget constraints.	
	I have enough materials to meet my students' needs.	
	I see the district placing unreasonable demands on teachers in the future.	
	Required paperwork and red tape absorb an unreasonable amount of my time.	
	I have an unreasonable workload.	
	I frequently feel irritated by my students' actions.	
	The curriculum I use needs a great deal of modification.	
 <u>Anticipated fulfillment of needs-</u>		 .67
	I see the district placing unreasonable demands on teachers in the future.	
	I made the right choice in choosing a career in education.	
	I am pleased by the possible changes ahead for my school.	
	I am optimistic about changes in our school.	

### Assessment of Colleagues' Morale Levels

In both this and the pilot study, a strong correlation existed between the perceived level of colleagues' morale and the identified level of one's own morale. However, there was a specific pattern present in both studies which warrants caution regarding instruments that assess peer attitudes and perceptions. People tend to perceive their own morale as higher than that of their colleagues'. In this study, 82% of the respondents indicated positive morale, while only 47% of the respondents assessed their colleagues' morale as not low. Although this is possible through lack of survey responses, it was not mathematically possible in the pilot study, where 80% of all teachers returned their surveys.

In both studies, roughly 10% of the respondents assessed their morale as lower than their colleagues' morale. Approximately 30% viewed their morale as the same as their colleagues, and approximately 60% assessed their morale as higher than that of their colleagues'. This pattern suggests that when teachers are asked to assess colleagues' morale, those colleagues who are perceived as having low morale may actually have higher morale than one would conclude based on observation. Figures 5 and 6 illustrate the two studies' results.

Explanation of the tendency to assume colleagues' morale as lower may lie in predictors of colleagues' morale. A regression analysis was used to compare the relationship of factors 1,2, and 5-7 with individual morale and colleagues' morale (Table 28). Factor 3 was excluded from this analysis because item 23, "The overall morale exhibited by my colleagues seems low," loaded onto factor 3. Results indicated that the strongest predictor of colleagues' morale is the Administrative Issues factor. Factor 7, Peer Support, was not a reliable predictor of overall morale, but it is a strong predictor of colleagues' morale. Anticipated Outlook of the Job Situation is also a

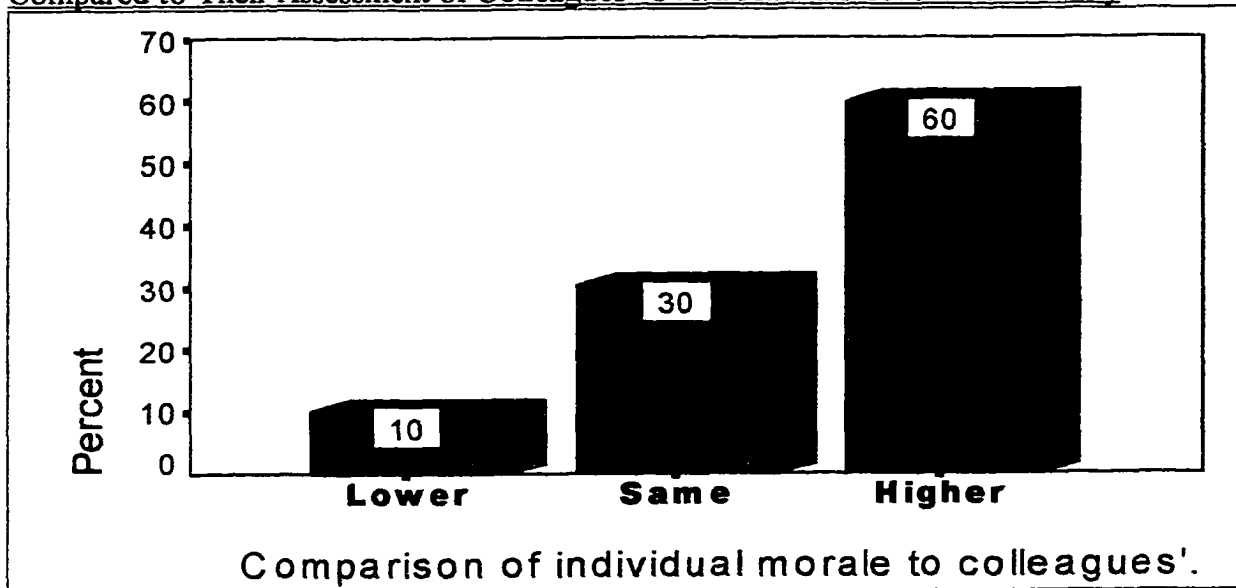
much stronger predictor of colleagues' morale. Conflict is not a reliable predictor of colleagues' morale but was a reliable predictor of overall morale.

**Table 28**  
**Comparison of Overall Morale and Colleagues' Morale**  
**Predictors Using Multiple Regression Analyses**

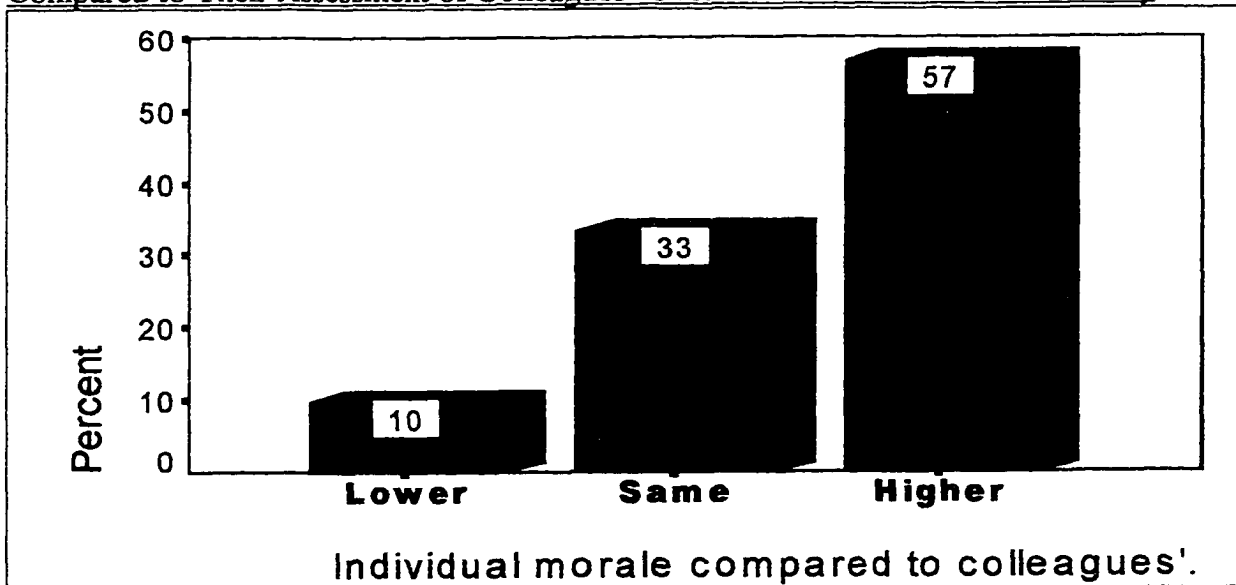
Variable	$\beta$		Unique		T		Sig T	
	O	C	O	C	O	C	O	C
Administrative Issues	.33	-.31	.11	.10	7.50	-6.80	.00	.00
Student and Classroom Experiences	.43	-.21	.18	.04	9.59	-4.49	.00	.00
Anticipated Outlook of the Job Situation	-.09	.16	.01	.03	-1.96	3.51	.05	.00
Teacher Autonomy and Influence	.26	.05	.07	.003	5.94	1.18	.00	.24
Conflict	-.19	.44	.03	.19	-4.17	9.59	.00	.00
Peer Support	.05	-.11	.003	.01	1.16	-2.37	.25	.02
			O	C				
Multiple R			.64	.61				
Adjusted R Square			.41	.36				

Note: O = Overall morale , C = Colleagues' morale, N = 308

**Figure 4**  
**Comparison of Respondents' Self-Assessed Morale Levels**  
**Compared to Their Assessment of Colleagues' Overall Morale Level – Pilot Study**



**Figure 5**  
**Comparison of Respondents' Self-Assessed Morale Levels**  
**Compared to Their Assessment of Colleagues' Overall Morale Level – Present Study**



## CHAPTER FIVE

### SUMMARY AND CONCLUSIONS

This study involved two main components. The first component dealt with the development and validation of a new instrument, the Teacher Outlook and Perceptions Survey. The second involved the use of the instrument to gain information about teacher morale.

#### **Part I**

#### **Development and Use of the Teacher Outlook and Perceptions Survey**

##### Development and Validation of the Instrument

In the early stages of the literature review, it became evident that there were important elements missing in the available teacher morale instruments. The morale model from which the SMQ (Smith, 1971) was developed seemed to deny the possibility of morale existing within the individual, and the PTO (Bentley & Rempel, 1970) was not developed with a solid conceptual framework. The instruments' biggest flaws were (1) their omission of student-related items and (2) their failure to consider the important relationship between the worker's anticipation of the job situation and morale level. In order to avoid the deficiencies in the present instruments, I developed a morale model and definition for morale from which the instrument was constructed.

Using the morale definition as a guide, items were developed to address each component of morale with a balance of context in mind. For example, need for relatedness was addressed in the context of teacher/student relations, teacher/administrator relations, and teacher/colleague relations. Unlike other teacher morale instruments, the survey was not heavily loaded with items that directly referred to the building administration. Due to the newness of the definition and model, item 8, "My overall level of morale is high," had to be included in the survey. It was the only feasible way to directly examine the relationship between the survey's items and teachers' morale levels.

The development of items which reflected specific needs into scales with Cronbach reliability coefficients greater than .60 helped to support the appropriateness of the human needs-based model of morale. Although the data were not completely conclusive, there appeared to be no evidence suggesting that the developed model and definition of morale were incorrect.

The pilot study was important in determining the validity and reliability of the instrument. First, it had to be determined whether or not the survey items were related to the teachers' morale levels. If not, the instrument could not be viewed as a morale instrument. Second, it was important to obtain an estimate of the reliability scores of the instrument if any conclusions based on its use were to be considered credible.

The results of the pilot study supported the validity of the instrument. The items were clearly related to teachers' morale levels. The appropriateness of the

morale model's inclusion of one's anticipated fulfillment of needs was also supported by the pilot study results. In addition, the alpha reliability coefficient obtained by the scale scores was .92. These results supported the continued use of the instrument in gathering information about teacher morale. Results from the pilot study concerning the validity and reliability of the instrument were replicated in the dissertation study. The Teacher Outlook and Perceptions survey appears to be a valid and reliable instrument.

#### Strengths and Uses for the Instrument

One of the most valuable uses of the Teacher Outlook and Perceptions survey is the identification of teachers with low morale. Discriminant analysis demonstrated that the instrument does a very accurate job of classifying teachers with low morale. Five specific items in the instrument were able to correctly classify nearly 82% of the low morale teachers. The implications of recognizing teachers with low morale are numerous. Transfer, staff development, teaming or mentoring, modification of assigned duties, and efforts to address specific staff concerns are all possible actions that may be taken in improving the morale of the teacher with low morale.

Valuable information not directly tied to morale may also be derived from the Teacher Outlook and Perceptions Survey. For example, it can provide a clearer picture about teachers' concerns for the future. When apprehensions about the future and anticipated change are evident within a building or district, implementation of



change may be altered, possibly through re-framing of changes, improving channels of communication, and obtaining greater input and involvement of staff. The identification of specific staff concerns may allow districts to make modifications and ward off future problems.

Data from the instrument also can help provide direction for improving the conditions of the teachers' working environment and students' learning environment. For example, periodic distribution of the Teacher Outlook and Perceptions Survey may be useful in measuring the impact of school or district-wide changes on the teaching staff. Responses gathered prior to implementation of a program could be compared to responses gathered after implementation.

#### Limitations of the Instrument

For use solely as a teacher morale instrument, the Teacher Outlook and Perceptions Survey has some limitations. First, its items account for roughly 55% of the variance in overall morale, meaning that more could be explained. Second, it excludes items reflecting community support and parental involvement, possible influences of a teacher's morale level. Third, the responses of at least a few items appear to be extremely skewed. For example, over 75% of the respondents see this district as placing "unreasonable demands" upon them in the future. The skewness of items may reflect a bias to answer in a particular way.

The skewed distribution of responses may also suggest that there are items in which teachers are prone to answer nearly unanimously, possibly without much thought. For example, 90% of the teachers indicated that they felt successful in their teaching endeavors, but only 68% of the teachers felt that their students were achieving at their expected levels. Either teachers are not thinking completely through in their response to the item addressing success, or there are other elements missing in the instrument which contribute to whether or not a teacher feels successful.

Recommendations for the instrument. In its present form, the Teacher Outlook and Perceptions Survey is not without flaws. The following recommendations should be considered.

1. Items not strongly related to morale should be removed. The two items on budget and collegial encouragement could be removed and replaced with items more reflective of teacher morale.
2. New items should be developed. One possible concept which may contribute to teacher morale is the respect demonstrated by students, parents, administration, and the community. Items addressing respect may contribute to understanding teacher morale.
3. The items specifically using the term “morale” could be removed for some purposes. The items have been confirmed as contributing to teacher

morale. The items' relationships with teachers' overall morale levels indicate that the instrument measures teacher morale.

4. Item 3, "I am supervised closely to ensure that I follow procedures properly," should either be reworded or removed. It was written with the intention of tapping into a teacher's perception of autonomy. Teachers who feel that someone is "breathing down their backs," should feel a loss of autonomy. Instead, the opposite occurred. Respondents who felt that they were supervised closely tended to have higher morale levels.

## **Part II**

### **The Study of Teacher Morale Using the Teacher Outlook and Perceptions Survey Instrument**

#### General Summary

This study provided insight into the experiences and concerns of teachers and the way in which those experiences and concerns contribute to teacher morale. It helped to portray a clearer picture of the roles that students, teachers, and colleagues play in the influence of teacher morale.

### The Research Questions

This study contributed to the understanding of the meaning of morale, what influences teacher morale, and how it is manifested. For each research question, valuable information was gained. The following section will discuss the findings with reference to each of the research questions.

Research Question One: Is there a statistically significant and substantive relationship between a teacher's anticipation of the job situation and the teacher's level of morale?

One of the most important findings of this study was that one's anticipated outlook of the job situation influences a teacher's morale level. This relationship had not been previously examined, perhaps because teachers' perceptions of the future were not integrated into earlier teacher morale instruments. Analysis of the Anticipated Outlook of the Job Situation factor suggested a statistically significant and substantive relationship between a given teacher's anticipated outlook and his/her morale level.

This link substantiates the connection between morale and motivation. Motivation is always future-oriented in nature. It involves movement toward a goal with the assumption that the reward associated with it is of value. We may now have greater awareness of the notion that perceptions of what has not yet occurred does impact the present state of morale.

The link between one's expectations for the future and teacher morale has important implications in the area of organizational change. Educators are experiencing a time in which school reform and change prevail. It is critical that the reasons behind change be communicated openly, that teachers participate in the change process, and that the short and long-term benefits of change are continually assessed.

Research Question Two: Is there a statistically significant and substantive difference between lower and upper elementary teachers' morale levels? If so, what accounts for these differences?

The result of this research question involved the only inconsistency between the pilot study and the dissertation study. No substantive difference in morale levels of lower and upper elementary teachers was found in this study, even though a medium to large effect size ( $d = .65$ ) was found in the pilot study.

A major factor that may have contributed to the inconsistency was the response rate. Had there been a larger number of respondents, results may have been different. It is possible that teachers who opted to not participate had lower morale. A large proportion of schools that opted to not participate may also have had teachers with lower morale. Principals may have been concerned about negative responses reflecting on their leadership in the school.

Although it was evident that overall upper elementary teachers did not have lower morale, the fifth grade teachers in the study group had much more negative

perceptions of their experiences and conditions in the school than did their colleagues. Those respondents who taught fifth grade indicated a greater sense of futility in their efforts, less friendliness exhibited by their students, and greater demands from their building administrators.

Differences of this type merit examination within a district. Supervisors, building administrators, and central administration may wish to examine whether perceived differences stem from emotion and attitude or whether they stem from actual differences in job expectations. In addition, staff support should be available to offset perceived inequities between and provide the resources to those teachers who feel that their efforts are futile.

With results from this study showing some difference between grade levels, and more distinctive differences found in the pilot study, further examination of the differences between the morale levels of lower and upper elementary teachers may be warranted.

Research Question Three: Is there a statistically significant and substantive relationship between student-related issues and a teacher's overall morale level? If so, does the student factor predict a teacher's morale level better than leadership factors?

This study provided evidence that there is a statistically significant and substantive relationship between student-related experiences and a teacher's overall morale level, and the student-related factor is a better independent predictor of overall

morale than is the administrative factor. The pilot study produced similar results, with the student factor being a stronger independent predictor of overall teacher morale than administrative-related items. This clearly suggests that In the future development of teacher morale instruments, student-related items should be included.

This study offered a more balanced perspective than had been previously available of the administrator's role in enhancing or diminishing teacher morale. Student-related issues are an important influence on a teacher's morale level. Teacher/student interactions influence teacher morale more strongly than do teacher/administrator interactions.

Exploration of the relative strength of the Administrative Issues and Student and Classroom Experiences factors in predicting teacher morale helped to gain a firmer understanding that teacher morale is not as solely reliant on leadership as we may have assumed. It is not only the administrator who makes or breaks the morale in a building. However, it is important to recognize that the administrator can influence many of the factors that contribute to teacher morale.

It would be good idea for the administrator to consider what ways he or she can influence the other factors that contribute to teacher morale. For example, a teacher's workload may not be directly related to Administrative Issues, but an administrator may have the resources to modify a teacher's workload. This may be done through hiring more teachers, reducing class size, or scheduling adequate plan time. An administrator may be able to develop some ways to cut unnecessary paperwork.

An administrator may also be able to influence the type of behaviors a teacher can expect from the students in the classroom. For example, creating and maintaining an orderly environment may also contribute to the types of behaviors seen in a school.

Research Question Four: Are the morale levels of lower and upper elementary teachers influenced differently by student-related factors?

There is evidence that lower elementary teachers experience a greater sense of success in their work with students. Upper elementary teachers have a tendency to anticipate worse student behavior in the future and feel that their students are not achieving as well. This suggests that the morale of upper elementary teachers is more strongly related to student-related experiences when compared to lower elementary teacher morale.

Administration may influence lower elementary teachers' morale more strongly than it influences upper elementary teachers' morale. Upper elementary teachers' morale levels are not as dependent on Administrative Issues. Administrative Issues is a much stronger predictor of lower elementary teacher morale than of upper elementary teacher morale. Although administration is not a student-related factor, administrators can influence the culture of a school, which in turn influences students.



### Additional Considerations

In addition to the findings linked to the research questions, several additional discoveries were made in the study.

- Success in teaching endeavors appears to be one of the most reliable predictors of teacher morale.
- Teachers have a more positive perception of the expectations placed upon them by administrators than those expectations originated in the central office.
- An estimated measure of the socioeconomic status of a school may be a viable alternative in data analysis when actual data is not available.
- The socioeconomic status of schools does not appear to impact teacher perceptions of students, but does impact teachers' perceptions of their workload.
- Teacher morale level is not influenced by the teacher age.
- There appears to be a strong link between some effective school correlates and teacher morale. An orderly school environment and the achievement of students contribute strongly to a teacher's morale.
- Teachers tend to perceive their own morale levels as higher than that of their colleagues'.
- With the exception of workload, there are no statistically significant or substantive differences between older and younger teachers' perceptions of their work experiences.

### Avoidance of Misinterpretation

In any study, results must be examined carefully before accurate interpretation can be made. It is critical to use caution in drawing conclusions. Two areas of discussion which are vulnerable to misinterpretation involve student achievement and student socioeconomic status (SES).

Links Between Student Achievement and Teacher Morale. In this study, a relationship between teacher morale and student achievement was evident. However, it is important to note that student achievement was reflected by the respondents' extent of agreement to item 6, "My students are achieving at what I consider their expected level." Agreement to this item does not necessarily reflect high achievement or excellence. For example, if a failing student is expected to perform poorly due to lack of skills, then his teacher may strongly agree that the student is achieving at an expected level. No normative measure of student achievement was used in the analyses.

High student achievement may lead to a teacher's affirmation of her competence in teaching. The morale of teachers who work in schools with high student achievement may be more strongly influenced by other conditions in the school that promote effectiveness. For example, if a sense of order is evident in the building, that sense of order may improve both student achievement and teacher morale. If a

new program directed at increasing student achievement is planned, teachers may experience higher morale due to a sense of new hope.

It should also be considered that teachers who exhibit high morale may be more inclined to try new approaches, make adjustments in accordance to students' needs, and invite student involvement and engagement in the learning process. These practices may in turn enhance student achievement. It is not possible to determine whether high teacher morale precedes student achievement or whether improved student achievement precedes high teacher morale. However, it would be erroneous to assume that student achievement will improve by simply putting in place practices to improve teacher morale.

SES and Teacher Morale. From the data in this study, it was difficult to draw clear conclusions about the relationship between teacher morale and a school's SES. In this study, SES was a reliable but relatively weak predictor of teacher morale when taking into account other factors. However, SES was a strong predictor of teachers' perceptions of their workload, which in turn influences morale. SES may influence teacher morale through specific factors.

The exact link between teacher morale and a school's SES was impossible to assess because many of the low socioeconomic schools in the district did not participate. Many of those that did had specialized programs in place or included specific grade levels in the building (e.g., primary grade centers).

It should be noted that SES is strongly correlated to teacher perceptions of colleagues' overall morale ( $p < .01$ ). This relationship is much stronger than that of individual morale and SES. Somehow the socioeconomic status of the school influences teachers' perceptions of their colleagues' morale levels. The relationship between these two variables warrants further investigation.

### Problems Encountered in the Study

Although the study succeeded in meeting its primary purposes, some serious problems were encountered. Initially, the study was to include more than one school district. Four surrounding districts declined to participate. Three of these districts were in the midst of completing several other state-mandated surveys, and one district was uncomfortable with the nature of the study.

Due to the large number of schools in the district that did participate, it was extremely difficult to influence participation of the school and response rate. Attempts were made to contact each principal by phone, but time constraints limited such individual contact. With this in mind, it may be more desirable in the future to select specific schools that represent different areas of a district, or to include more districts.

A relatively small proportion of teachers indicated that their overall morale level was not high. In light of the changes in the district and uncertainty ahead, it is puzzling why so many agreed that their overall morale level was high. Surveys were sent and received through school mail. This method of survey distribution may have biased

teacher response. There may have been some teachers who were concerned about the central administration's awareness of their survey responses.

There appeared to be a certain level of distrust as teachers completed the surveys and sent them through school mail. Many teachers obliterated the portions of the district mail envelope labeled "sent by" and "from." Twenty teachers returned their surveys through U.S. mail directly to the University of Nebraska at Omaha, even though no specific address was provided in the cover letter.

### **Part III**

#### **Implications for Future Research**

##### Self vs. Other Perceptions

The tendency for teachers to view their own morale as higher than their colleagues has clear implications in the field of organizational theory. One reason for the tendency may be that topics of conversation between teachers tend to be negative (e.g., griping, arguing), causing others to perceive the overall morale of the colleagues as being low. Another explanation may be a desire within individuals to see themselves as better off than their peers. A third possibility may be a tendency for teachers to not be completely honest with themselves when reflecting on their morale. Each of these considerations warrants further examination because they can contribute to our understanding of organizations. It could be very useful to systematically investigate the

differences individual morale and perceptions of colleagues' morale in organizations outside of education.

It is particularly interesting that the proportions of perceptions were nearly the same for both the pilot and present studies. For both studies, roughly 10% viewed their individual morale levels as lower than that of their colleagues, about 30% viewed the two levels as the same, and about 60% of the respondents perceived their individual morale levels as higher than the overall morale level of their colleagues. If future studies conclude that there tends to be a constant 10% of individuals, in most organizations, who perceive their morale as lower than their colleagues', it may be advantageous to identify those individuals and implement interventions or outside resource assistance.

### Student Achievement and Teacher Morale

A second area of research that needs further investigation is the connection between student achievement and teacher morale. The school serves as a learning environment for students and a work environment for staff. In analysis of the relationship between teacher morale and teacher success, the effect size of teacher success was very large ( $d=1.44$ ). Keeping in mind that the perception of success in teaching endeavors is one of the strongest predictors of morale, further examination into the ties between student achievement and teacher morale can be very valuable.

Analysis of the relationship between an orderly environment and teacher morale also resulted in a very large effect size ( $d=1.19$ ). A sense of order in a building provides stability and security to the environment, allowing teachers to direct their focus on student growth.

There is a strong call for accountability in education. Understanding and addressing teacher morale may be one way to enhance teacher effectiveness. In turn, successful implementation of programs may increase student achievement and thereby improve teacher morale.

#### Administration and Teacher Morale

A third suggestion for further study involves the indirect effect that administration has on teacher morale. Administration appears to have a strong direct effect on teacher morale, but not as strong an effect as student-related issues. Teacher workload and the anticipated outlook of the job situation also impact teacher morale. Use of path analysis and multi-level analysis may help to provide greater insight into how administration influences teacher morale through the influence of teachers' working conditions.

There also appear to be differences in lower and upper elementary teachers' perceptions of their work experiences. Upper elementary teachers seem to have a more negative perception of their workload. They appear to be more burdened by paperwork and time constraints. The difference between lower and upper elementary

teachers' perceptions of Workload and Demands was particularly evident in fifth grade teachers. Building administrators may wish to make an extra effort to see that their upper elementary teachers are not over-burdened by the workload and that they are provided adequate planning time.

### SES and Teacher Morale

The influence of socioeconomic factors on teacher morale also warrants future investigation. Although the socioeconomic status of the school did not appear to be a strong predictor of teacher morale, there may be indirect effects through which the socioeconomic status variable may have greater influence on teacher morale. For example, student threats may be most evident in lower socioeconomic status schools.

### Teacher Morale and Teacher Attrition

With teacher shortages on the horizon, it would be valuable to examine the relationship between morale and attrition. Considering that teacher morale is influenced by numerous factors, it would be helpful to identify what specifically leads to teachers leaving the field.

Teacher morale and teacher attrition may partially explain why there appears to be no statistically significant or substantive differences between the morale levels of younger and older teachers. There may be an age range at which teachers with lower



morale have left the field while those with higher morale continue in their teaching career until retirement.

#### Implications of Upper Elementary Departmentalization

In comparison of upper and lower elementary teachers, it appeared that the perceptions of teachers toward several items (e.g., student achievement, teacher success) improved at the sixth grade level. There was a higher proportion of sixth grade teachers who participated in departmentalization. Although analysis conducted in this study indicated that there was no statistically significant difference in the morale levels of teachers that did departmentalize and those that did not within the same grade level, these results are not completely conclusive.

Departmentalization in the upper grades may impact teacher workload and teacher perceptions of success and achievement. Teacher focus on a specific area of curriculum may help cut preparation and alleviate tensions encountered when working with students with behavioral problems. In working with a student who exhibits problem behaviors, a teacher may be able to be more objective, sympathetic, and open to alternative educational strategies when he or she doesn't spend a solid six-hour block with the child. The upper elementary teacher may find the opportunity to work with a wider variety of students throughout the day more enjoyable. Research in this area could be very worthwhile.

### Teacher Efficacy and Teacher Morale

The specific connections between teacher efficacy and teacher morale should be explored. Teacher efficacy is related to power and competence needs and may partially represent the needs component of the morale model used in this study. A relationship between teacher efficacy and student achievement has been suggested. This relationship may be better explained through examination of the link between morale and efficacy.

## **Part IV**

### **Implications and Conclusion**

#### Implications for Research

For the past decade, research concerning teacher morale has been overshadowed by research on technology in education, assessment, brain research, multiple intelligence, etc. Yet it cannot be assumed that there is nothing more to discover or gain by continued research on teacher morale. I recently heard a secondary administrator comment, “when teacher morale is low, a building can go into a state of paralysis” (personal communication, 1999). Although recent research about teacher morale is scant, continued reference to teacher morale is made in articles, speeches, and presentations. The morale model developed in this study may invite future research by providing consistency and clarity to a concept that is generally considered nebulous.

### **Implications for Practice**

Very recently, over 500 teacher employees of the participating district in this study attended a school board meeting with the purpose of conveying to the board concerns about teacher salary and working conditions. Reference to paperwork, after school meetings, classroom size, student behavior, and expectations of the district and building administration were among the concerns presented to the board.

Considering that over 80% of this study's respondents felt that the district had placed "unreasonable demands" upon the teachers, it was not entirely surprising to see over 20% of the district's teaching force attend the board meeting. However, there is a great deal more to teacher morale than demands and paperwork. It was particularly interesting to note that in spite of reference to pay, workload, and demands, a sense of genuine interest and enjoyment in working with children was clearly communicated. An "I love to teach kids" message was ever present.

Clearer understanding about teacher morale on the part of board members, building administrators, and central office administrators coupled with action based on that understanding can prevent the type of low teacher morale exhibited at the school board meeting.

There have been many "best practices" identified for teachers to use in their instructional delivery. This best practices approach to teaching is used with the hope of improving student achievement. Perhaps this study can help school districts to provide an initial outline for a best practices approach to enhancing teacher morale. District

adoption of this type of best practices approach may offset the present teacher shortage that is expected to mushroom in the next century.

### **Conclusion**

It is important to recognize that the usefulness of the information gathered from this study is not limited to educational practice or research. The morale model and definition are applicable to any job. Researchers in the areas of psychology, sociology, and business administration could use the model as a guide in developing instruments to assess employee morale in other organizations.

Although a great deal of information was gained from this study, there still is much about morale yet to be explored. Guion (1958) once described researchers' aversion to the term 'morale' stating, "Some people avoid the term as though it were possible to hide in a corner and wait for it to go away" (p.60). Simpler concepts may be easier to explore, but that makes morale no less important. With the conceptual foundation provided in the study, hopefully researchers will be more willing to leave their corners and pursue future work in morale research.

## References

- Alderfer, C.P. (1972). Existence, relatedness, and growth. New York: Free Press.
- Andrews, L. Parks, D.J., Nelson, A., & the Phi Delta Kappa Commission on Teacher/Faculty Morale. (1985). Administrator's handbook for improving faculty morale. Bloomington, IN: Phi Delta Kappa.
- Bandura, A. (1995). Self-efficacy in changing societies. New York: Cambridge University Press.
- Bentley, R.R. & Rempel, A.M. (1970). Manual for the Purdue Teacher Opinionnaire. West Lafayette, IN: The University Book Store.
- Birch, D. & Veroff, J. (1966). Motivation: A study of actions. Monterey, CA: Brooks/Cole.
- Blum, M.L., & Naylor, J.C. (1968). Industrial psychology: Its theoretical and sociological foundations. New York: Harper & Row.
- Borg, W.R., & Gall, M. (1989). Educational research: An introduction (5<sup>th</sup> ed.). White Plains, NY: Longman, Inc.
- Brayfield, A.H., & Crockett, W.H. (1978). Employee attitudes and employee performance. In Victor Vroom & Edward L. Deci, (Eds.) Management and motivation (pp., 72-82). Kingsport, TN: Kingsport Press Inc.
- Briggs, L.D., & Richardson, W.D. (1992, June). Causes and effects of low morale among secondary teachers. Journal of Instructional Psychology, 19 (2), 87-95.
- Brodinsky, B. (1984, April). Teacher morale: What builds it, what kills it. Instructor, 53, 36-44.
- Brown, G., & Henry, D. (1992). Using the climate survey to drive school reform. Contemporary Education, 63 (4), 277-284.

Bruno, J.E. (1983). Equal educational opportunity and declining teacher morale at black, white, and Hispanic schools in a large urban school district. The Urban Review, 15 (1) , 19-36.

Calabrese, R.L., & Fisher, J.E. (1988). The effect of teaching expectations on levels of alienation. Journal of Psychology, 122, 147-153.

Cattell, R.B., & Child, D. (1975). Motivation and dynamic structure. New York: Halsted Press.

Chaplin, J.P. (1979). Dictionary of psychology (5<sup>th</sup> ed.). New York: Dell Publishing Co.

Clees, W.J., & Nabors, M.L., (1992, Fall). Teacher incentive programs - Do they make better teachers? Education, 113 (1), 145-148.

Clover, S. (1984). Organizational climates of elementary schools: A revision of the organizational climate description questionnaire. Ph.D. dissertation, Rutgers University.

Coladarci, T. (1992, Summer). Teachers' sense of efficacy and commitment to teaching. The Journal of Experimental Education, 60 (4), 323-344.

Czubaj, C.A. (1996, Spring). Maintaining teacher motivation. Education, 116 (3), 372-378.

Dean, D.G. (1961). Alienation: Its meaning and measurement. American Sociological Review, 26, 733-753.

DeCharms, R. (1968). Personal causation. New York: Academic Press.

Deci, E. (1995). Why we do what we do. New York: Puttman Sons.

Doherty, J. (1988). Psychological morale: Its conceptualisation and measurement, the Doherty Inventory of Psychological Morale (DIPM). Educational Studies, 14 (1), 65-75.

- Dreeben, R. (1973). The school as a workplace. In R.M. Travers, (Ed.), Second handbook of research in teaching (pp.450-473). Chicago: Rand McNally.
- Evans, L. (1992). Teacher morale: An individual perspective. Educational Studies, 18, 161-171.
- Evans, L. (1997). Understanding teacher morale and job satisfaction. Teaching and teacher education, 13 (8), 831-845.
- Evans, L. (1998). Teacher morale, job satisfaction, and motivation. London: Paul Chapman Publishing.
- Evans, R. (1996). The human side of school change. San Francisco, CA: Jossey-Bass.
- Engel, R. A. (1986, Nov.). Creating and maintaining staff morale: The personnel administrator's role in a time of ferment in education. Clearing House, 60(4),104-116.
- Farber, B. (1984, Jul./Aug.). Stress and burnout in suburban teachers. Journal of Educational Research, 77(6), 325-331.
- Farber, B. (1991). Crisis in education: Stress and burnout in the American teacher. San Francisco, CA: Jossey-Bass Publishers.
- Frase, L.E. (1990). Teacher incentive programs: Diversity and effectiveness without state funding. The Clearing House, 64 (1), 95-98.
- Fraser, L. (1990). Morale in the Atlanta public schools. Report No. 4. (ERIC Document Reproduction Service No. 341760).
- Glasser, W. (1986). Control theory in the classroom. New York: Perennial Library.
- Greenberg, J. (1996). Managing behavior in organizations. Upper Saddle River, NJ: Prentice-Hall.

Greenwood, G., & Soar, R. (1973). Some relationships between teacher morale and teacher behavior. Journal of Educational Psychology, 64(1). 105-108.

Guion, R. (1958). Industrial morale: The problem of terminology. Personnel Psychology, 11, 59-61.

Hackman, J.R., & Oldham, G.R. (1980). Work redesign. Reading, MA: Addison-Wesley.

Halpin, A.W. (1966). Theory and research in administration. New York: MacMillan.

Hart, P.M. (1992). Stress and morale: Their independence in determining teacher quality of work life. Paper presented at the AARE/NZARE 1992 Joint Conference, Deakin University, Geelong, Nov.22-26,1992. (<http://www.swin.edu.au/aare/conf92/HART92.33>).

Henderson, D. (1994). Texas teachers, moonlighting and morale, 1980-1994. (ERIC Document Reproduction Service No. 369744).

Herzberg, F., Mausner,, B., Peterson, R.O., & Campbell, D.F. (1957). Job attitudes: A review of research and opinion. Psychological Services of Pittsburgh.

Herzberg, F. (1966). Work and the nature of man. Cleveland, OH: World Publishing.

Howard, E. M. (1989). A correlational study of kindergarten teachers' morale with kindergarten students' feelings about school. (ERIC Document Reproduction Service No. 321850).

Hoy, W., Tarter, C.J., & Kottkamp, R. (1991). Open schools/healthy schools: Measuring organizational climate. Newbury Park, CA: Sage Publications.



Imber & Niedt, (1990). Teacher participation in school decision making. In Pedro Reyes (Ed.), Teachers and their workplace (pp.67 -85). Newbury Park, CA: Sage.

Kanter, R. (1977) Men and women of the corporation. New York, NY: Basicbooks.

Kelley, C. (1995, Spring). Excellent teachers rewarded: Re-designing compensation. WCER Highlights, 7 (1).

Kottkamp,, R.B. (1990). Teacher attitudes about work. In Pedro Reyes (Ed.), Teachers and their workplace (pp. 86-114). Newbury Park, CA: Sage Publications.

Kohn, A. (1993). Punished by rewards. New York: Houghton Mifflin.

Lawler, E.E. III, & Porter, L. (1978). Antecedent attitudes of effective managerial performance. In V. Vroom & E. Deci (Eds.) Management and motivation (pp. 253-264). Kingsport, TN: Kingsport Press.

Lester, P. (1984). Development of an instrument of measure teacher job satisfaction. Ph.D. dissertation, New York University.

Lester, P. (1990, Feb.). Fifty ways to improve teacher morale. Clearing House, 63, 274-275.

Lester, P., & Bishop, L. (1997). Handbook of tests and measurements in education and the social sciences. Lancaster, PA: Technomic.

Levine, D.U., & Lezotte, L. (1990). Unusually effective schools. Madison, WI: The National Center for Effective Schools Research and Development

Lortie, D.C. (1975). School teacher: A sociological study. Chicago: University of Chicago Press.

Maslach, C. & Jackson, S.E. (1981). The measurement of experiences burnout. Journal of Occupational Behavior, 2, 99-113.

Maslow, A.H. (1970). Motivation and personality (2<sup>nd</sup> ed.). New York: Harper & Row.

Maslow, A.H. (1971). Some basic propositions of a growth and self-actualization psychology. In E. Southwell and M. Merbaum (Eds.) Personality: readings in theory and research (2<sup>nd</sup> ed.) pp. 223-234. Belmont, CA: Brooks/Cole.

Matthes, W.A., (1990, Summer). Teacher beliefs regarding career ladders and merit pay. Education, 110 (4), 535-540.

McClelland, D.C. (1971). Assessing human motivation. New York: General Learning Press.

Mueller, D., & Chase, C.. (1988, Feb.). Effects of reduced class size in primary classes. Educational Leadership, 45(5), 48-50.

Mulrine, A. (1999). Off to the principal's office. In U.S. News and World Report Best graduate schools, 2000 edition. (p.67). Washington, DC: U.S. News and World Report.

Murray, H. A. (1938). Exploration in personality. New York: Oxford University Press.

Natale, J. (1993, July). Why teachers leave. The Executive Educator, 14-21.

National Center for Educational Statistics, (1997, August). Statistical analysis report: job satisfaction among American teachers: effects of workplace conditions, background characteristics, and teacher compensation. (NCES 97-471).

Nicholas, E.M. (1989). How to keep an aging teacher alive. Principal, 69 (2), 27-28.

Organ, D. (1996). A restatement of the satisfaction-performance hypothesis. In R. M. Steers, L.W. Porter, & G. Bigley (Eds.), Motivation and leadership at work (pp.386-395). (6<sup>th</sup> ed.). New York: McGraw-Hill.

Parkay, F. Olejnik, S. & Praller, N. (1988, Summer). A study of relationships among teacher efficacy, locus of control, and stress. Journal of Research and Development, 21 (4), 13-21.

Pellicer, L.D. (1984,Nov.). Job satisfaction: Its impact upon teacher attendance. NASSP Bulletin, 68, 44-47.

Pelsma, Dennis, Harrington, Richard, & Barry, Judith. (1989, Jan.). The quality of teacher work life survey: A measure of teacher stress and job satisfaction. Measurement and Evaluation in Counseling and Development, 21, 165-176.

Porter, L., & Lawler, E. III. (1968). Managerial attitude and performance. Homewood, IL: Irwin.

Raschke, D. B., Dedrich, C.V., Strathe, M.J., & Hawkes, R. (1985). Teacher stress: The elementary teacher's perspective. The Elementary School Journal, 85 (4), 559-564.

Rempel, A.M., & Bentley, R.R. (1964). The measurement of teacher morale: A factor analysis approach. Education and Psychological Measurement, 24, 631-642.

Reyes, P. (1989). The relationship of autonomy in decision making to commitment of schools and job satisfaction: a comparison between public school teaching and mid-level administrators. Journal of Research and Development in Education, 22 (2), 62-69.

Reyes, P. (1990). Organizational commitment of teachers. Teachers and their workplace. Pedro Reyes (Ed). Sage publications: Newbury Park, NY .

Rose, J.S., & Medway, F.J. (1981). Measurement of teachers' beliefs in their control over student outcomes. Journal of Educational Research, 74, 185-187.

Ross, I.G., Zander, A. (1978). Need satisfactions and employee turnover. In V. Vroom & E. Deci (Eds.) Management and motivation (pp. 61-71). Kingsport, TN: Kingsport Press.

Ryan, R.M. (1982). Control and information in the intrapersonal sphere: An extension of cognitive evaluation theory. Journal of Personality and Social Psychology, 43, 450-461.

Sayles, L., & Strauss, G. (1966). Human behavior in organizations. Englewood Cliffs, NJ: Prentice-Hall.

Schaer, B., & Trentham, L.. (1986). Self-concept and job satisfaction: Correlations between two instruments. Psychological Reports, 58, 951-956.

Schneider, B., & Dachler, P. (1978). A note on the stability of the job description index. Journal of Applied Psychology, 63.

Stagner, R. (1958). Motivational aspects of individual morale. Personnel Psychology, 11, 64-70.

Smith, K. (1971). The validation of a morale measuring instrument. Journal of Educational Administration, 9, 32-37.

Smith, K. (1976, May). Morale: A refinement of Stogdill's model. Journal of Educational Administration, 14 (1), 87-93,

Smith, K. (1987). One hundred dissertations: a review of the University of New England morale research project. Journal of Educational Administration, 25 (1), 101-125.

Staw, B. (1996). Organizational psychology and the pursuit of the happy/productive worker. In R.M. Steers, L. Porter, & G. Bigley (Eds.) Motivational and leadership at work (6<sup>th</sup> ed.) (pp. 396-407). New York: McGraw-Hill.

Steers, R.M., Porter, L., & Bigley, G. (1996) Motivation and leadership at work (6<sup>th</sup> ed.). New York: McGraw-Hill.

Stogdill, R.M. (1959). Individual behaviors and group achievement. New York: Oxford University Press.

Taylor, B. & Bullard, P. (1995) The revolution revisited: Effective schools and systemic reform. Bloomington, IN: Phi Delta Kappa Educational Foundation

Unruh, A., & Turner, A.E. (1970). Supervision for change and innovation. New York: Houghton Mifflin.

Wangberg, E., & Metzger, D. (1982, Sept./Oct.). Working conditions and career options lead to female elementary teacher job dissatisfaction. Journal of Teacher Education, 33, (5), 37-40.

White, W.F. (1988, Fall). Teacher morale and student achievement. Reading Improvement, 25 (3), 222-232.

Wild, T.C., Nix, G., Deci, E., & Enzle, M. (1997). Perceiving others as intrinsically or extrinsically motivated: effects on expectancy formation and task engagement. Personality and Social Psychology Bulletin, 23 (8), 837-848.

Wong, R. (1991). Construct validation of the staff morale questionnaire: The Singapore scene. Journal of Educational Administration, 29,(1), 71-80.

Vroom, V. (1964). Work and motivation. New York: Wiley.

Zigarelli, M. (1996, Nov/Dec.) An empirical test of conclusions from effective schools research. Educational Research, 90 (2), 103-110.

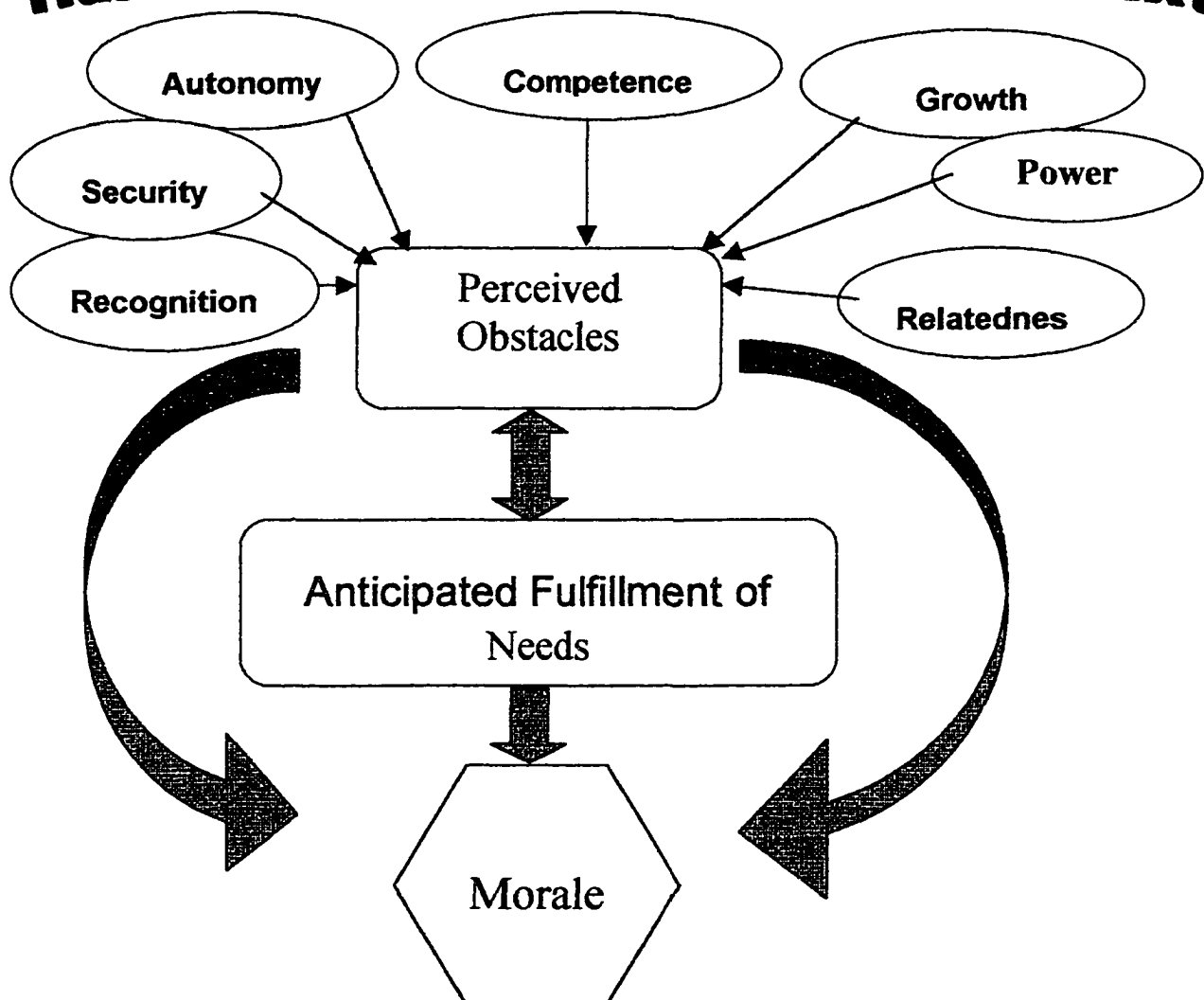
## APPENDIX A

### Morale Model

## MORALE MODEL

Morale – a psychological state which stems from the interaction of job-related fulfillment of needs, anticipated fulfillment of needs, and perceived obstacles to needs fulfillment.

### Human Needs Within the Job Context



**APPENDIX B**

**Survey cover letter**



Dear Educator,

I am conducting a study to gain information about teachers' experiences and perceptions of change in education. Teacher input about the teaching profession and what lies ahead is very valuable. Through your completion of the enclosed survey, your input can provide vital information about the teaching profession. Your participation in this study would be greatly appreciated.

Enclosed is a survey which should take less than 20 minutes to complete.

**Please be assured that all responses will remain confidential.** If you would like a copy of the final report of this study, please write your name and mailing address on the back of the answer sheet, and I will be happy to send you a copy upon completion of the study.

I would like to thank you in advance for your time, interest, and participation.

Sincerely,

Marcellina Anderson  
Doctoral candidate  
Department of Educational Administration  
University of Nebraska at Omaha

## APPENDIX C

Teacher morale survey  
used in the pilot study

For each statement, please circle your response.

	1 Strongly Disagree	2 = Mostly Disagree	3 = Slightly Disagree	4 = Undecided	5 = Slightly Agree	6 = Mostly Agree	7 = Strongly Agree
1. I have enough materials to meet my students' needs.	1	2	3	4	5	6	7
2. When needed, I can rely on my colleagues for assistance.	1	2	3	4	5	6	7
3. I am supervised closely to ensure that I follow procedures carefully.	1	2	3	4	5	6	7
4. My students appreciate my efforts.	1	2	3	4	5	6	7
5. I skip lessons in order to be consistent with other teachers, even when my students are not ready to move on.	1	2	3	4	5	6	7
6. My students are achieving at what I consider their expected level.	1	2	3	4	5	6	7
7. I feel that I am successful in my teaching endeavors.	1	2	3	4	5	6	7
8. My level of morale is high.	1	2	3	4	5	6	7
9. Other teachers have utilized my ideas in their classrooms.	1	2	3	4	5	6	7
10. I feel in charge when I teach.	1	2	3	4	5	6	7
11. The administration at my building listens and attends to my concerns.	1	2	3	4	5	6	7
12. My suggestions for school improvements are basically ignored.	1	2	3	4	5	6	7
13. I enjoy teaching my students.	1	2	3	4	5	6	7
14. There are teachers in my building that I consider close friends.	1	2	3	4	5	6	7
15. The administration at my building adheres strictly to discipline policies and procedures.	1	2	3	4	5	6	7
16. I am uncertain about the direction our building is heading academically.	1	2	3	4	5	6	7
17. There is a sense of order in my building.	1	2	3	4	5	6	7
18. Each year I teach, I try new things.	1	2	3	4	5	6	7

19. I enjoy learning about new teaching techniques and strategies that have been found to be effective.	1	2	3	4	5	6	7
20. There is little opportunity for growth in my position.	1	2	3	4	5	6	7
21. I am pleased by the possible changes ahead for my school.	1	2	3	4	5	6	7
22. My principal is aware of my strengths and abilities.	1	2	3	4	5	6	7
23. My teaching is limited by budget constraints.	1	2	3	4	5	6	7
24. The overall morale exhibited by my colleagues seems low.	1	2	3	4	5	6	7
25. In disciplinary matters, my administrator supports me.	1	2	3	4	5	6	7
26. Required paperwork and red tape absorb an unreasonable amount of my time.	1	2	3	4	5	6	7
27. I feel comfortable discussing school problems with my principal.	1	2	3	4	5	6	7
28. The curriculum I use needs a great deal of modification.	1	2	3	4	5	6	7
29. There is a sense of belonging in my school.	1	2	3	4	5	6	7
30. For the most part, my work with students is highly satisfying and rewarding.	1	2	3	4	5	6	7
31. My administrator values my input on school issues.	1	2	3	4	5	6	7
32. I am able to alter my curriculum to meet my students' needs.	1	2	3	4	5	6	7
33. I often feel that my efforts to reach my students are futile.	1	2	3	4	5	6	7
34. I have an adequate amount of planning time.	1	2	3	4	5	6	7
35. My teaching position allows me a comfortable standard of living.	1	2	3	4	5	6	7
36. Student threats to staff are a concern in my building.	1	2	3	4	5	6	7

37. Changes proposed for our school will do little to help solve present problems.	1	2	3	4	5	6	7
38. I frequently feel irritated by my students' actions.	1	2	3	4	5	6	7
39. My district places unreasonable demands on its teachers.	1	2	3	4	5	6	7
40. My work is easier and more enjoyable because of my principal.	1	2	3	4	5	6	7
41. There is a great deal of complaining, bickering, and taking sides among our staff.	1	2	3	4	5	6	7
42. I made the right decision in choosing a career in education.	1	2	3	4	5	6	7
43. I expect student behavior to decline in the years ahead.	1	2	3	4	5	6	7
44. I see more demands being placed on teachers in the future.	1	2	3	4	5	6	7
45. I experience an undue amount of stress and strain from teaching.	1	2	3	4	5	6	7
46. I have an unreasonable work load.	1	2	3	4	5	6	7
47. My students are generally friendly and pleasant to interact with.	1	2	3	4	5	6	7
48. My colleagues do not provide encouragement.	1	2	3	4	5	6	7
49. I am optimistic about changes in our school.	1	2	3	4	5	6	7

Please complete the following demographic information.

50. Please indicate:  male  female

51. Please indicate your assigned grade level or curricular area. (You may indicate more than one.)

Pre-K.  Kindergarten  First  Second  Third  Fourth  
 Fifth  Sixth  Art  Library  Music  Physical Education  
 Special Education

52. Please indicate the number of years of teaching experience you have.

0-5 years  6-10 years  11-15 years  16 or more years

53. Please indicate your current level of education.

Bachelor's degree  Some graduate hours beyond a bachelor's degree  Master's degree  
 Graduate hours beyond a master's degree  Ph.D. or Ed.D.

54. Do you currently participate in any grouping or departmentalization (other than art, music, physical education, or library) such that you do not have the same students all day?

Yes  No

Please identify and briefly comment on any items that seemed unclear such that you didn't understand what was being asked.

**I'd like to thank you again for your participation. Your input is greatly appreciated!**

**Appendix D**  
**Pilot Study Results**

## Pilot Study Results

A pilot study was conducted with seven primary purposes in mind:

1. To determine if a statistically significant and substantive relationship between morale levels of lower and upper elementary teachers exists.
2. To determine if a teacher's forward state of mind, or outlook of the job situation, has a statistically significant and substantive relationship with a teacher's morale level.
3. To determine the importance of the relationship of student-related factors with a teacher's morale level.
4. To investigate the importance of "group cohesiveness" in determining a teacher's morale level.
5. To refine the teacher morale instrument through investigation of items which may be vague or low in contribution to the overall understanding of teacher morale.
6. To construct scales, using factor analysis, which have a minimum Cronbach reliability coefficient of .60.
7. To examine differences between teachers' perceptions of their own morale and their perceptions of the colleagues' overall morale level.



Results of the study clearly indicate that primary teachers tend to have a higher morale level than upper elementary teachers. These differences had an observed significance level of .0159, well within the .05 criterion.

Item Two: Research on morale for the past five decades has suggested that one's "forward state of mind" is a critical component of morale. In spite of this, none of the teacher morale surveys (specifically the Staff Morale Questionnaire and the Purdue Teacher Opinionnaire) contain any items pertaining to the future or the teacher's outlook of the job situation.

Results of this survey indicate that of all the items, optimism is one of the strongest predictors of teacher morale. Items pertaining to changes, the academic direction of the building, and the future create a reliable scale.

Item Three: It may seem common sense that students have a great impact on teacher morale. However, the two most widely used instruments, the Staff Morale Questionnaire (SMQ) and the Purdue Teacher Opinionnaire (PTO) minimize the importance of the student-related factor. The SMQ contains no student-specific items, and the PTO only has five out of one-hundred items related to student-related concerns or experiences.

Results indicate that the student-factor is probably the most important component of teacher morale. In most cases, it is a stronger predictor of morale than administration-related items. The student-related items concerned teachers' enjoyment with their interactions of students, and teachers' perceptions of success with their students.

Item Four: One major school of thought in morale research asserts that morale is a group phenomenon. In other words, morale doesn't stem from the individual. There has been some movement away from this approach to morale research.

This study strongly supports the latter. Issues concerning colleagues were not good predictors of a teacher's morale level. It appears that a teacher experiences morale as a result of individual experience - not what others are experiencing. Although there is a strong relationship between the teacher's morale and his/her perception of the overall morale of colleagues, it is not through collegiality or group cohesiveness that a teacher's morale is evident. These findings are inconsistent with other research on teacher morale. But these differences may be primarily due to the strong relationship between student-related variables and future outlook variables and teacher morale. Previous studies have not investigated these variables very closely, if at all.

Item Five: Out of the 95 surveys returned, only 8 contained comments indicating ambiguity or vagueness. The items questioned involved mostly items indicative of demands or support. Respondents were unsure if reference was being made to building or district levels. These items will be revised in order to prevent uncertainty. Two items, pertaining to curriculum also may be deleted from the study.

Item Six: Initial analysis is indicating several items which fit clearly into scales. The most reliable scales consist of the following: administration-related items, student-related items, colleague-related items, future outlook, and obstacles.

Of these scales, or factors, the one consisting of student-related items is the strongest predictor of teacher morale. This is followed by future outlook, administration-related items, and pressures of the workload. The factor consisting of colleague-related items did not predict individual teacher morale levels when taking into account the other factors.

Item Seven: The items which predict teachers' perceptions of their colleagues' morale were different than those which predicted their own morale. Teachers tended to view their personal morale level as higher than their colleagues'. Colleague-related factors were strong indicators of teachers' perceptions of their colleagues' morale, even though these factors were not strongly related to their own individual morale. Also, administrative factors were more strongly related to what a teacher considered the overall morale of his/her colleagues when compared to his/her own individual morale level when other factors were taken into account.

General findings: Results demonstrated that of the respondents, nearly 70% indicated a positive morale, while only 30% were either undecided, or leaning toward low morale. However, about 56% of the respondents perceived their colleagues as exhibiting low morale.

There appears to be a threshold point where administrative-related issues affect morale. When taking into account other factors, such as student-related factors, pressures from the workload, and optimism and outlook, administration did not significantly impact the morale levels of teachers who rated administration highly. However, administration-related items did contribute significantly to the morale levels of teachers who expressed dissatisfaction with administration. Over 80% of the respondents indicated that they felt comfortable discussing concerns with their administration and that their administrators listened and attended to their needs.

Budget concerns were a particularly pertinent issue in light of recent attempts to override tax levy limits. Teachers' responses were basically split as to whether or not budget constraints limited their teaching. However, the item reflecting budget concerns was strongly related to teachers' morale levels.

Teachers' sense of optimism and welcome for change were also basically split in the middle. Again, both of these items were strongly related to teacher morale level. Teachers also nearly unanimously responded that they saw more and more demands being placed on them in the future (96.7%). Due to respondents' unanimous agreement, this item did not demonstrate a statistically significant relationship to teacher morale.

Appendix E  
Teacher Outlook and Perceptions Survey

For each statement, please circle your response.

	1 Strongly Disagree	2 = Mostly Disagree	3 = Slightly Disagree	4 = Undecided	5 = Slightly Agree	6 = Mostly Agree	7 = Strongly Agree
1. I have enough materials to meet my students' needs.	1	2	3	4	5	6	7
2. When needed, I can rely on my colleagues for assistance.	1	2	3	4	5	6	7
3. I am supervised closely to ensure that I follow procedures carefully.	1	2	3	4	5	6	7
4. My students appreciate my efforts.	1	2	3	4	5	6	7
5. I feel pressured by my colleagues to be consistent with their practices in the classroom, even if I disagree with them.	1	2	3	4	5	6	7
6. My students are achieving at what I consider their expected level.	1	2	3	4	5	6	7
7. I feel that I am successful in my teaching endeavors.	1	2	3	4	5	6	7
8. My level of morale is high.	1	2	3	4	5	6	7
3. Other teachers have utilized my ideas in their classrooms.	1	2	3	4	5	6	7
10. I feel in charge when I teach.	1	2	3	4	5	6	7
11. The administration at my building listens and attends to my concerns.	1	2	3	4	5	6	7
13. My suggestions for school improvements are basically ignored.	1	2	3	4	5	6	7
13. I enjoy teaching my students.	1	2	3	4	5	6	7
14. There are teachers in my building that I consider close friends.	1	2	3	4	5	6	7
16. The administration at my building adheres strictly to discipline policies and procedures.	1	2	3	4	5	6	7
17. I am uncertain about the direction our building is heading academically.	1	2	3	4	5	6	7
17. There is a sense of order in my building.	1	2	3	4	5	6	7

18. Each year I teach, I look forward to trying new things in the classroom.	1	2	3	4	5	6	7
19. There is little opportunity for growth in my position.	1	2	3	4	5	6	7
20. I am pleased by the possible changes ahead for my school.	1	2	3	4	5	6	7
21. My principal is aware of my strengths and abilities.	1	2	3	4	5	6	7
22. My teaching is limited by budget constraints.	1	2	3	4	5	6	7
23. The overall morale exhibited by my colleagues seems low.	1	2	3	4	5	6	7
24. In disciplinary matters, my administrator supports me.	1	2	3	4	5	6	7
25. Required paperwork and red tape absorb an unreasonable amount of my time.	1	2	3	4	5	6	7
26. I feel comfortable discussing school problems with my principal.	1	2	3	4	5	6	7
27. The curriculum I use needs a great deal of modification.	1	2	3	4	5	6	7
28. There is a sense of belonging in my school.	1	2	3	4	5	6	7
29. For the most part, my work with students is highly satisfying and rewarding.	1	2	3	4	5	6	7
30. The principal at my building values my input on school issues.	1	2	3	4	5	6	7
31. I am given the flexibility to alter the curriculum to meet my students' needs.	1	2	3	4	5	6	7
32. I often feel that my efforts to reach my students are futile.	1	2	3	4	5	6	7
33. I have an adequate amount of planning time.	1	2	3	4	5	6	7
34. Student threats to staff are a concern in my building.	1	2	3	4	5	6	7

36. I see the district placing unreasonable demands on teachers in the future.	1	2	3	4	5	6	7
36. Changes proposed for our school will do little to help solve present problems.	1	2	3	4	5	6	7
37. I frequently feel irritated by my students' actions.	1	2	3	4	5	6	7
38. I made the right decision in choosing a career in education..	1	2	3	4	5	6	7
39. My work is easier and more enjoyable because of my principal.	1	2	3	4	5	6	7
40. There is a great deal of bickering, and taking sides among our staff.	1	2	3	4	5	6	7
42. My principal has realistic expectations of the teachers in this building.	1	2	3	4	5	6	7
42. I expect student behavior to decline in the years ahead.	1	2	3	4	5	6	7
43. I experience an undue amount of stress and strain from teaching.	1	2	3	4	5	6	7
44. I have an unreasonable work load.	1	2	3	4	5	6	7
45. My students are generally friendly and pleasant to interact with.	1	2	3	4	5	6	7
46. My colleagues do not provide encouragement.	1	2	3	4	5	6	7
47. I am optimistic about changes in our school.	1	2	3	4	5	6	7

Please complete the following demographic information.

48. Please indicate:  male  female

49. Please indicate your assigned grade level or curricular area. (You may indicate more than one.)

Pre-K.  Kindergarten  First  Second  Third  Fourth  
 Fifth  Sixth  Art  Library  Music  Physical Education  
 Special Education

50. Please indicate the number of years of teaching experience you have.

0-5 years  6-10 years  11-15 years  16 or more years

51. Please indicate your current level of education.

Bachelor's degree  Some graduate hours beyond a bachelor's degree  Master's degree  
 Graduate hours beyond a master's degree  Ph.D. or Ed.D.

52. Do you currently participate in any grouping or departmentalization (other than art, music, physical education, or library) such that you do not have the same students all day?

Yes  No

**Appendix F**  
**Factor Analysis Results for Factors 8-10**



Factor Items and Loadings for Factors 8, 9, and 10

<u>Factor</u>	<u>Loading</u>	<u>Group</u>		<u>d</u>
		<u>Lowest</u> <u>M(SD)</u>	<u>Highest</u> <u>M(SD)</u>	
<u>Eight</u>				
There are teachers in this building that I consider close friends. **	.77	5.62(1.59)	6.27(1.09)	.49
<u>Nine</u>				
I feel pressured by my colleagues to be consistent with their practices in the classroom, even if I disagree with them. *	.78	2.96(1.67)	2.19(1.42)	.50
<u>Ten</u>				
I have enough materials to meet my students' needs. **.	-.58	4.24(1.96)	5.09(1.70)	.46

Note. \*  $p < .05$ , \*\*  $p < .01$ , \*\*\*  $p < .001$ ,  $N = 308$

Appendix G  
Alpha Reliability Results for the  
Teacher Outlook and Perceptions Survey

Alpha Reliability Results of the Teacher Outlook and Perceptions Survey

	Scale Mean if Item Deleted	Scale Variance if Item Deleted	Corrected Item- Total Correlation	Alpha if Item Deleted
I am uncertain about the direction our building is heading academically.	232.3377	1006.9996	.3923	.9120
My students are achieving at what I consider their expected level.	232.5000	1024.7524	.3246	.9125
My students appreciate my efforts.	232.1753	1023.9561	.3867	.9119
I expect student behavior to decline in the years ahead.	233.8864	1022.3486	.2835	.9133
There is a sense of belonging in my school.	231.8766	1007.2746	.5418	.9104
There is a great deal of bickering, and taking sides among our staff.	232.3961	1008.2009	.4159	.9116
My teaching is limited by budget constraints.	233.8312	1029.4633	.2184	.9141
I feel in charge when I teach.	231.2435	1038.1327	.3104	.9126
I made the right choice in choosing a career in education.	231.4578	1021.7018	.4203	.9116
I feel comfortable discussing school problems with my principal.	231.9416	1000.2506	.4982	.9106
The curriculum I use needs a great deal of modification.	233.6364	1018.7794	.3272	.9127
I see the district placing unreasonable demands on teachers in the future.	234.9870	1016.5796	.4302	.9115
The administration at my building adheres strictly to discipline policies and procedures.	232.3279	990.4817	.5963	.9095
My work is easier and more enjoyable because of my principal.	232.1234	987.6264	.6066	.9093
My colleagues do not provide encouragement.	231.4091	1033.9428	.2754	.9129
I enjoy teaching my students.	230.9968	1033.5081	.4657	.9118

	Scale Mean if Item Deleted	Scale Variance if Item Deleted	Corrected Item- Total Correlation	Alpha if Item Deleted
I am given the flexibility to alter the curriculum to meet my students' needs.	231.4643	1037.1486	.2578	.9130
My students are generally friendly and pleasant to interact with.	231.5779	1023.6258	.4730	.9113
There are teachers in my building that I consider close friends.	231.4870	1041.8728	.1709	.9139
I often feel that my efforts to reach my students are futile.	232.5942	1012.4764	.4178	.9116
There is little opportunity for growth in my position.	232.6461	1009.2978	.3544	.9126
The principal at my building values my input on school issues.	231.9123	994.8164	.6199	.9094
I frequently feel irritated by my students' actions.	233.0682	1015.7054	.3559	.9123
The administration at my building listens and attends to my concerns.	231.7597	994.4437	.6111	.9094
I have enough materials to meet my students' needs.	232.5877	1020.0933	.3153	.9128
The overall morale of my colleagues seems low.	232.8799	987.3438	.5899	.9095
Each year I teach, I look forward to trying new things in the classroom.	231.1494	1034.3229	.4281	.9120
I am optimistic about changes in our school.	232.4708	996.5627	.6054	.9096
There is a sense of order in my building.	231.7825	995.2717	.6207	.9094
I have a reasonable amount of plan time.	234.0584	1016.2572	.2961	.9134
I am pleased by the possible changes ahead for my school.	232.4286	1002.8060	.5795	.9100
I feel pressured by my colleagues to be consistent with their practices in the classroom, even if I disagree with them.	232.0130	1045.4200	.1024	.9150
My principal has realistic expectations of the teachers in this building.	231.9318	999.4970	.5664	.9100

	Scale Mean if Item Deleted	Scale Variance if Item Deleted	Corrected Item- Total Correlation	Alpha if Item Deleted
Required paperwork and red tape absorb an unreasonable amount of my time.	235.1981	1033.4688	.2268	.9136
When needed, I can rely on my colleagues for assistance.	231.2500	1035.0220	.2866	.9128
For the most part, my work with students is highly satisfying and rewarding.	231.3571	1020.5496	.5817	.9108
My overall level of morale is high.	231.7305	1015.9630	.6373	.9103
Proposed changes will do little to solve present problems.	233.4383	1003.8952	.5112	.9105
My principal is aware of my strengths and abilities.	231.8442	1012.5033	.4677	.9111
I experience an undue amount of stress and strain from teaching.	233.7435	1006.8363	.4397	.9113
I feel that I am successful in my teaching endeavors.	231.5000	1032.5244	.3946	.9120
My suggestions for school improvement are basically ignored.	232.3312	1004.1636	.5029	.9106
I am supervised closely to ensure that I follow procedures carefully.	232.5455	1028.4768	.2670	.9132
In disciplinary matters, my Administrator supports me.	231.7403	999.5675	.5759	.9099
I have an unreasonable workload.	233.7468	1008.4373	.4183	.9116
Student threats are a concern at my building.	232.6429	1014.1066	.3340	.9128
Other teachers have utilized my ideas in their classrooms.	231.7078	1046.5007	.1879	.9134

N of Cases = 308.0

N of Items = 47

**Alpha=.9134**

**Appendix H**

**District Participation Approval Letter**



DIVISION OF RESEARCH

3215 CUMING STREET OMAHA, NEBRASKA 68131-2080 (402) 557-2120 FAX: (402) 557-2049

November 20, 1998

Marcellina Anderson  
5624 N. 61<sup>st</sup> Avenue  
Omaha, NE 68104-1616

Dear Ms. Anderson:

We have received your letter requesting to conduct a study as part of your doctoral program. Your study will help determine to validity and reliability of a teacher morale instrument.

You indicate your method of data collection will include a survey which will be personally distributed by you.

We believe your study has merit and permission is granted for you to proceed under the following conditions:

- Principals agree to your study.
- Teachers in affected buildings agree to your study.
- In the reporting of the results, teachers and students will not be personally identifiable.
- You will be willing to share results of your study with OPS.

Best wishes.

Sincerely,

A handwritten signature in cursive script, appearing to read "Peter Smith".

Peter Smith  
Coordinator of Research

PS/jb

Appendix I  
IRB Approval Letter





University  
of Nebraska

Institutional Review Board (IRB)  
Office of Regulatory Affairs (ORA)  
University of Nebraska Medical Center  
Eppley Science Hall 3018  
986810 Nebraska Medical Center  
Omaha, NE 68198-6810  
(402) 559-6463  
Fax (402) 559-7845  
E-mail: [irbora@unmc.edu](mailto:irbora@unmc.edu)  
<http://info.unmc.edu/iro/ironome.htm>

December 14, 1998

Marcellina Anderson  
5624 North 61st Avenue  
Omaha, NE 68104

IRB#: 096-98-EX

TITLE OF APPLICATION/PROTOCOL: A Comparative Study of the Morale Levels of Primary and Upper Elementary Public School Teachers

Dear Ms. Anderson:

The IRB has reviewed your Exemption Form for the above-titled research project. According to the information provided, this project is exempt under 45 CFR 46:101b, category 2. It is the IRB's understanding that this study will now be conducted at only OPS schools. You are therefore authorized to begin the research.

It is understood this project will be conducted in full accordance with all applicable sections of the IRB Guidelines. It is also understood that the IRB will be immediately notified of any proposed changes that may affect the exempt status of your research project.

Please be advised that the IRB has a maximum protocol approval period of five years from the original date of approval and release. If this study continues beyond the five year approval period, the project must be resubmitted in order to maintain an active approval status.

Sincerely,

A handwritten signature in cursive script, appearing to read 'E. Prentice'.

Ernest D. Prentice, PhD  
Vice Chair, IRB

EDP:jlg