

Kamehameha Schools Faculty Association

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Charles Reed Bishop on merit pay

It will never be possible to adjust salaries exactly according to merit. There will always be jealousy, and pegs upon which an excuse for asking for more pay can be hung. It is so with clerks, teachers and salaried people generally and with mechanics, miners and others on wages.

— *from Charles Reed Bishop Letter File, page 30, compiled and edited by Harold W. Kent, prepared for the Sesquicentennial of Charles Reed Bishop, January 25, 1972*

Education Week: Is Merit Pay the Answer?

By Kim Marshall

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To most people, it seems obvious that teachers should earn more when their students do well. If salespeople get extra pay when they sell more products, why shouldn't teachers be rewarded for higher test scores? U.S. Secretary of Education Arne Duncan, among others, has been talking up this idea.

But it turns out that merit pay is an ineffective strategy for] improving teaching and learning. Here's why.

- It undermines teamwork. Teachers who are rewarded for their own students' test-score gains are less likely to share ideas with their colleagues.

- The best teachers are already working incredibly long hours, and there's no evidence that extra pay will make them work harder or smarter—or that it will motivate mediocre teachers to improve. Quite the contrary: Merit pay will steer all too many teachers toward low-level test preparation.

- Standardized tests are often “instructionally insensitive”—that is, they're better at measuring

students' family advantages and disadvantages than the school's or the teacher's value-added effect.

- Standardized tests in many states don't put enough emphasis on writing and critical thinking, so raising the stakes for teachers creates an incentive to shortchange these important life skills.

- To address the last two problems, it's been suggested that schools should use higher-quality, before - and-after tests in September and May to measure each teacher's contributions to student learning. Nice idea, but experts say it takes at least three years of data to produce a fair value-added measure of individual teacher effectiveness.

- Raising the stakes on tests increases the urge to cheat. Most teachers are scrupulously honest as they proctor their test-taking students, but higher stakes will result in more thumbs on the scale.

- A good many students are pulled out of regular classes for small-group help with other teachers. How could we figure out a fair way to dole out merit pay for these children's achievement?

- Good scores in one 4th grade class (for example) would boost that teacher's pay—but what about the 3rd grade, 2nd grade, 1st grade, kindergarten, and preschool teachers who helped

Is merit pay the answer?

those students along the way? Don't they deserve some of the loot? If so, how would we calculate their share?

- Fully half of teachers work with grades and subjects that don't have standardized tests—kindergarten, 1st and 2nd grades, art, music, and physical education, for example. Is it fair that they aren't eligible? These concerns, to my way of thinking, demolish the argument for individual merit pay. And yet, Arne Duncan is absolutely right: Student learning should be at the center of the conversation within schools. So how can we accomplish this without creating knotty problems and perverse incentives?

Actually, the solution is being implemented by resourceful educators right now. In many of America's most effective schools, principals make frequent unannounced visits to classrooms and give informal feedback on what students are learning and how instruction can be improved. Teacher teams in these schools collaboratively design curriculum units, give common assessments to their students every four to six weeks, immediately huddle to discuss what worked and what didn't, share best practices, re-teach what wasn't mastered, and help struggling students.

By frequently checking for understanding and fixing learning problems before they snowball, these schools draw on teachers' and administrators' collective wisdom and keep everyone's focus on the most important questions: Are students learning, and, if not, what's our next move?

Small wonder that students in these schools are making dramatic gains, and achievement gaps

are being closed. Small wonder that teachers in these schools are continuously improving their craft.

Getting this collaborative "engine of improvement" running is not easy. Some of the success factors are technical—24-hour turnaround of interim assessment results and clear data displays, for example—but others have to do with the level of trust among teachers and administrators. Just as important as shifting the conversation in a school to results is keeping the assessment process informal and low-stakes, so that teachers feel safe admitting when things aren't working and will listen to ideas from colleagues. The process is similar to Total Quality Management, a successful business strategy emphasizing small adjustments during a process, rather than officious inspection at the end of the line.

Does this mean that we're stuck with the traditional model of paying teachers based on years of service and academic credentials? Not necessarily. There are ways of tweaking this clunky model: salary increments to master teachers who mentor colleagues and serve as skilled curriculum planners, trainers, and team leaders, or offering higher pay to attract top-notch teachers to more-challenging schools and hard-to-staff subjects. In addition, we should explore the idea of rewarding entire teaching staffs for well-

documented, multi-year gains in student learning.

Let's experiment with these ideas. But more important, let's emulate the supervision and assessment approaches of our most effective schools and steer clear of the ineffective strategy of individual merit pay. It is a distraction in our drive to improve America's schools.

Kim Marshall was a teacher, principal, and central-office administrator in the Boston public schools for 32 years, and now coaches new principals (with New Leaders for New Schools), consults, and publishes a weekly newsletter at www.marshallmemo.com. His latest book, *Rethinking Teacher Supervision and Evaluation: How to Work Smart, Build Collaboration, and Close the Achievement Gap*, was published this month by Jossey-Bass.

May 17, 2008 (reprinted with the permission of the Honolulu Advertiser)

Kamehameha ups pay for executives

By Rick Daysog, Advertiser staff writer

In a year it hit several educational and financial milestones, Kamehameha Schools rewarded Chief Executive Officer Dee Jay Mailer with a \$17,437 pay increase.

In its annual tax filings with the Internal Revenue Service, Kamehameha Schools said it paid Mailer \$591,677 in salary, benefits and other compensation during the fiscal year ending June 30, 2007.

That pay package was up from Mailer's year-earlier compensation of \$574,230.

The \$9.1 billion trust's highest compensated executive was Kirk Belsby, vice president of endowment. He received \$689,560 last year, which was up nearly 3.9 percent from his 2006 compensation of \$663,724.

Mailer's and Belsby's compensation were on the high end of what large Hawai'i foundations and trusts pay their top executives. But it was well below the \$820,000 average that the state's largest healthcare nonprofits pay their CEOs.

Kamehameha Schools spokesman Kekoa Paulsen said the trust's compensation policies are performance based and reflect the credentials and qualifications of its executives.

The estate's endowment grew by a record \$1.4 billion in its 2007 fiscal year, paving the way for future expansion of its educational programs.

Founded by the 1884 will of Princess Bernice Pauahi Bishop, Kamehameha Schools educates children of Hawaiian ancestry.

The trust, the state's largest private landowners and one of the nation's wealthiest charitable trusts, spent a record \$250 million on its educational programs last year and reached 35,000 Native Hawaiian students and families last year.

Kamehameha Schools said it expects to spend another \$270 million to \$277 million this year. And under a longer-term plan, Kamehameha Schools aims to increase the number of students it serves to 55,000 by the year 2018.

According to its tax filing, two dozen Kamehameha Schools employees and trustees received more than \$100,000 in compensation last year.

Two former trustees — Henry Peters and Matsuo Takabuki — also receive six-figures payments through a decades-old deferred compensation that was discontinued in the early 1990s.

Peters, who resigned in 1999 after the IRS threatened to revoke the school's tax-exempt status, took home \$488,619 in deferred pay last year while Takabuki, who retired in 1993,

received \$307,806 in deferred pay.

A deferred compensation plan is a tax-savings strategy that allows an executive to postpone the payment of part of his or her annual compensation until a later date, when the executive is in a lower tax bracket.

Among its officers and managers, Kamehameha Schools said it paid Vice President of Strategic Planning Christopher Pating \$422,088, Financial Assets Director Elizabeth Hokada \$325,864 and Commercial Assets Director Paul Quintiliani \$302,111.

Special Projects Director Susan Todani earned \$231,756 last year while Michael Chun, headmaster of the Kapalama campus, received \$237,888.

Kamehameha's board members Douglas Ing, Nainoa Thompson, Diane Plotts and retired Adm. Robert Kihune earned between \$97,500 and \$113,500 each last year while Constance Lau, who stepped down from the board during the 2007 fiscal year after she became Hawaiian Electric Industries Inc.'s CEO, received \$73,500.

Her replacement, First Hawaiian Bank executive Corbett Kalama, earned \$27,000. Trustee's pay is set by the state Probate Court.

Others executives listed in the tax filing included:

- Neil Hannahs, director of the trust's land assets division, who earned \$204,510.
- Human Resources Director Richard Lau, who earned \$221,109.
- Ann Botticelli, the trust's vice president of community relations and communications, who made \$182,293 in pay and benefits.
- Colleen Wong, vice president of legal services, who earned \$257,350.

NOTE

The article above appeared two years ago, before the US financial crisis. According to public reports, some of the salaries above have been lowered approximately 5%. However, it is worth noting that teachers at that time were being told that even though the economy was doing well, they could not be given raises because the estate must be managed in the most financially prudent and conservative manner possible.

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Average US non-profit CEO compensation in 2007: \$434,000

How is one to interpret the salary data on the previous page? Like other tax-exempt charitable organizations, KS is required to report the salaries and compensation of its top officers to the IRS each year, via form 990. The information then becomes public record, and it becomes possible to make comparisons with other charitable and educational non-profit organizations. Figures below are from the 2007 tax year.

The Milton Hershey School and Trust in Hershey, Pennsylvania, also K-12, with an endowment of \$8 billion, is perhaps the closest to KS in size among all US educational non-profits.

Hershey School (\$8 billion endowment)

Highest-paid officer	\$345,392
2nd highest-paid	\$200,000
3rd highest-paid	\$190,150
trustees	\$0

Harvard (\$36.9 billion endowment)

Highest-paid officer	\$640,000
2nd highest paid officer	\$36,346
trustees	\$0

Yale (\$22.6 billion endowment)

Highest-paid officer	\$911,250
2nd highest paid	\$510,229
3rd highest paid	\$506,360
4th highest paid	\$470,000
trustees	\$0

Not shown is additional compensation and benefits. The Yale president received almost \$290,000 in benefits and other compensation.

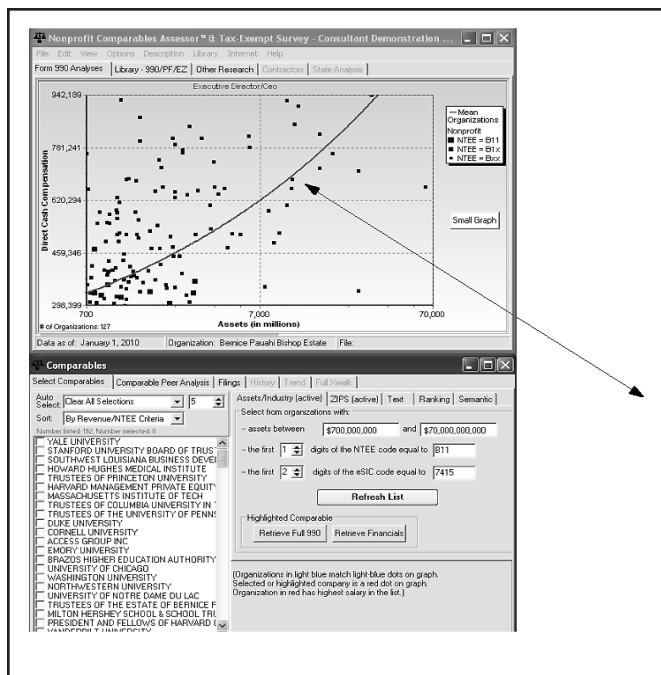
The average national CEO compensation for all non-profits with budgets greater than \$50 million is \$434,000. Compensation at the 90th percentile, however, is \$785,000.

The average compensation for the CEO of educational K-12 non-profit organizations with budgets of \$10 to \$50 million is \$335,000. However, compensation at the 90th percentile is \$515,000.

Given these figures, it is not unreasonable to conclude that KS trustees, executives and administrators are unusually well compensated — relative to national standards for large 501-c3 non-profit educational organizations.

Specific compensation figures, or more recent ones as they become available, can be accessed (through a free Windows software download) at this website: www.eri.com. See the graph below.

— Jan Becket, unit 11-12



KS CEO compensation, relative to the major US educational non-profits (Stanford, Yale, Princeton, etc.)

— source: www.eri.com

Go ahead - place yourself

Below is a simplified excerpt of the current, 2010-2011 pay scale offered to teachers in the 9-12 unit of a large private school in Hawai'i. (Unfortunately, not Kamehameha.) For brevity, only the odd years were included below, except for years 18-20.

Please note that under the KS step scale, it takes 25 years to reach the top pay, whereas at the school below, it only takes 20 years. In addition, at KS the highest pay at the bottom of the right column requires an MA+60 or a PhD, whereas at the school below, a teacher reaches top pay at MA+30 Teachers at the school below received pay raises this year ranging from 2.9% to 6.2% on top of their 2009-10 step.

Step	BA	BA+36/MA	MA+30
1	\$42,645	\$44,342	\$46,026
3	\$45,687	\$47,529	\$49,360
5	\$48,865	\$51,034	\$52,891
7	\$53,556	\$56,235	\$57,910
9	\$57,244	\$60,263	\$61,923
11	\$62,736	\$64,602	\$66,277
13	\$66,847	\$69,309	\$70,968
15		\$74,317	\$76,171
17		\$79,675	\$81,517
18		\$84,617	\$86,573
19		\$87,111	\$89,125
20		\$90,160	\$92,245

Viewpoints

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Ka Pi'ina: nightmare on Makuakane Street

We have all seen horror movies where the monster gets shot, skewered, baked and boiled but defies reason and survives to return again and again to pursue our hero and stumbling damsel until the film runs out, the lights come on, and we step back into the real world. Well, Ka Pi'ina is like that horror flick which defies logic even though some hope it will be the new reality. Our previous newsletters stabbed so many holes in Ka Pi'ina that it should have killed the beast. Some of the should-be-fatal wounds were that Ka Pi'ina's actions would hurt (not help) its stated purpose and that Ka Pi'ina would have a disastrous affect on school climate, teachers' control of their pay, and our union.

The conflict between the intended purpose of Ka Pi'ina and its proposed actions not only dooms the project to fail but also calls into question the wisdom and motives of those proposing Ka Pi'ina. Instead of rewarding, retaining and recruiting teachers as its authors claim, Ka Pi'ina is far more likely to have the opposite effect of rebuking, releasing and repelling them. Does anyone believe that more evaluations and threatening a step and column freeze or decrease will attract teachers from schools with less frequent and less consequential evaluations? How can a program even be proposed when its actions oppose its purpose? Now, that's scary!

Another fatal flaw with Ka Pi'ina is that it would replace our current collaborative relationship between teachers with a competitive one. Students benefit when teachers help each other and share their knowledge. Why should teachers help their colleagues when it might damage their position in the pecking order and even affect their pay? These are steps in the wrong direction. And speaking of backward steps, no longer would your step be automatic, annual, or necessarily an increase and no longer would the pay columns be yours to determine by earning additional academic

credits. Why have a union and negotiate a pay scale if management can put you anywhere on the scale it wants? Which makes us wonder if that isn't the real purpose of the beast – to kill the union.

To give management the an opportunity to calm our fears, KSFA gave them space in our newsletter to refute negative arguments and clarify their intentions. They accepted the space but made no attempt to address our main concerns. Left untouched in their reply was any explanation of why eliminating teachers' control of their financial future was going to be perceived as a reward and enhance recruitment and retention. Also unexplained was why teachers were going to love more evaluations and flock to Kapālama. The best they could do was to agree that Ka Pi'ina could make things “more competitive and less collaborative” but “on the other hand, things could be more supportive (e.g., mentor and coaches) and more collaborative (e.g., professional learning communities, action based research).” Now that is spooky. The leaders of this proposal aren't sure that it won't damage our collaborative learning environment but because “things could be” better (even though they offer no arguments to support their theory), they want us to try it.

Regarding “trying” it, KS is now in the process of spending \$1.5 million on a “pilot” that will not help us decide if we want it at all. If the leaders of this proposal agree that Ka Pi'ina “could” make things worse, isn't that what a pilot should be testing? Among other things, our “pilot” doesn't test whether or not it will reward, recruit or retain teachers. The purpose of a pilot should be to test the major concepts of a change on a small scale to see if it will fulfill its intended purpose without creating unwanted side effects. Couldn't that objective be achieved at much less cost (and much less commitment) with a survey or by sending some teachers on a sabbatical to a location with an existing and successful merit pay system? If finding a

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successful merit pay system is too difficult, then even a sabbatical to an imperfect merit pay school system that could be tweaked is better than starting from scratch. Other deficiencies of our “pilot” are: It won’t test the effect it will have on school climate. It won’t test how teachers will react to losing control of their pay or making salary negotiations pointless. And, it won’t test how management will exercise its new power to place you anywhere it wants on the pay scale and the ripple effects that will have on performance, climate, reward, recruitment and retention. What will our “pilot” test or try out?

Currently, our “pilot” is focused on training KS volunteers to use the Danielson evaluation system. The Danielson system is not a bad system, but it has limitations and is no substitute for judgment. It

was not designed for its intended use in Ka Pi’ina. It’s a tool to help improve performance not for identifying the achievement of various levels of performance for the purpose of determining pay, promotions and demotions. Let’s briefly examine the “Danielson Framework” so that you can judge for yourself if you want to trust it to determine your steps and columns.

Danielson carves the teaching profession into four domains (Planning and Preparation, Classroom Environment, Professional Responsibilities, and Instruction) that are measured by whether or not various specific indicators (goals) have been satisfied. For example, one of the goals in the in-

struction domain is to use “a variety of instructional methods.” Fulfilling this goal would contribute to a good performance evaluation. Not fulfilling it would be a noted deficiency. Certainly using “a variety of instructional methods” is something to consider and use some of the time as are all the other 10 or so goals indicated. But is a teacher who fulfilled 10 of the 10 “squares” better than one who filled only 8 of the 10? In short, is the total evaluation score equal to the sum of the squares satisfactorily fulfilled? For a number of reasons, the answer is “NO.”

It was not designed for its intended use in Ka Pi’ina. It’s a tool to help improve performance, not for identifying the achievement of various levels of performance for the purpose of determining pay, promotions and demotions.

What kind of things can a “fill-the-square” checklist accurately evaluate and equate to a level of performance from which career decisions such as pay and promotions can be made? There are some simple, repetitive, proce-

dural-driven tasks with well-defined observable behaviors and limited judgment calls where it might work well. Some machine operator’s or night watchman’s duties that have to be done the same way every time for reasons of safety or security might be effectively evaluated and scored with a checklist. Other jobs that require creativity, judgment, multiple approaches, insight and imagination are better evaluated when observed by someone with expertise in the field and who is allowed to use judgment in determining competence. For example, while you could use a checklist to reject a doctor, you are unlikely to use a “fill-the-square” checklist and submit your healthcare decisions to

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AUTHORIZATION FORM FOR DEDUCTION OF UNION DUES/SERVICE FEE OUT OF WAGES

I, _____, an employee of Kamehameha Schools ("KS") voluntarily agree to have KS take out of my wages regular monthly dues as established by the Kamehameha Schools Faculty Association ("KSFA") in accordance with its Constitution and Bylaws, or a regular monthly Service Fee not to exceed KSFA's regular monthly dues for its members as certified to you in writing by KSFA, and to turn over to KSFA any and all such monies on the following conditions:

1. This authorization shall become effective upon the date set forth below and cannot be cancelled for a period of one year from this date or until the termination of the existing collective bargaining agreement between KS and KSFA, whichever occurs sooner, unless cancelled sooner as provided in Section 2 below.

2. I agree and direct that this authorization shall be irrevocable for successive periods of one year each, or for the period of each succeeding applicable collective bargaining agreement between KS and KSFA, whichever shall be shorter unless:

(a) I cancel this authorization by written notice to KS at any time or within ten days after the expiration of any such one year period; or

(b) In the case of the expiration of any applicable collective bargaining agreement between KS and KSFA during any such one year period, I cancel this authorization by written notice to KS at any time during the period following the expiration of the applicable collective bargaining agreement and ten days after the effective date of any new agreement.

3. This authorization is subject to sufficient wages being available to comply with all other required deductions and existing federal and state laws. This authorization shall be suspended during any period in which there is no collective bargaining agreement in effect between KS and KSFA. This authorization shall end if my employment with KS ends. This

Employee Signature

Receipt of the foregoing authorization is acknowledged:

Date

Employer

Mailing Address:

SS#

Your KSFA Representative Assembly

UNIT KES

Winona Farias Anna Lee Lum, Bette Savini, Lynn Tagami, (1 vacancy)

UNIT KMS

Deane DeCastro, Eric Kane, Don Kroessig, Koy Omo, Grace Omura

UNIT 9/10

Rick Heyd, Bill Follmer, Larry McElheny, Warren Takata, Erin Wilson

UNIT 11/12

Jan Becket, Claire Ho, Ka'ala Kawai Melelani Pang, Michael Puleloa

EXECUTIVE BOARD MEMBERS

— OUR NEGOTIATING TEAM—

President	Don Kroessig
Vice President	Melelani Pang
Treasurer	Don Kroessig
Secretary	Grace Omura

Your Weingarten Rights

I believe this discussion could lead to my being disciplined. I therefore request that a union representative be present to assist me at this meeting. I further request reasonable time to consult with my union representative regarding the subject and purpose of the meeting. Please consider this a continuing request. Without proper representation, any discussion you require me to participate in from this point on and any statements you may derive therefrom I shall regard as coerced in willful disregard of my rights as set forth by the Supreme Court of the United States. Nor do I consent to any searches or tests affecting my person, property, or effects without first consulting with my union representative.

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the doctor who has the most squares covered. The reason? All the nice-to-have and “bedside manner” squares are trumped by knowledge, judgment and track record qualities. Similarly, you are not going to use a checklist to rank order and select: an artist (i.e. painter, composer, choreographer, or writer), a spouse, a warrior (i.e. a military commander or fighter pilot), or a teacher. Why? Because, among other things, each position requires a variety of talents of varying importance, subjectivity, measurability, and replace ability. Selecting an artist or a spouse is far too subjective and emotional for a checklist decision. People know what they like and are not going to let a checklist score change that. With a warrior, winning is everything. You are not going to select one who you think is less likely to win regardless of all his fine qualities that checklists do so well at quantifying. No checklist will accurately distinguish between an average, above average, or outstanding teacher for multiple reasons. By necessity, a checklist will focus on observable behaviors. But teaching is an information transferring and problem solving exercise with unlimited variables (i.e. subject, content complexity, grade level, student qualities, student backgrounds, class size, etc.). Not only is it impossible for a checklist to take into account the unlimited variables, it is even more daunting for it to cover how well the teacher solved the students’ learning problems. There is no checklist to evaluate judgment, insight, creativity, knowledge, patience, dedication, and persistence. These are just some of the qualities that evaluators subjectively judge when considering what makes a good teacher. Even if you could objectively rate these individual qualities, the overall rating would still be a subjective judgment call. In the end, the accuracy of a Danielson evaluation is dependent on the subjective judgment of the evaluator and what he or she chooses to value. If your evaluator

likes the way you teach, the evaluation checkmarks will confirm that opinion. If management is not happy with you, the checkmarks will reflect that opinion. Since with Ka Pi’ina so much is riding on each evaluation, what will never happen is the checkmarks overriding the opinion of the evaluator.

The point here is Danielson won’t endow the evaluation process with a sense of fairness and accuracy beyond that already possessed by the evaluator. Nor will it compel future evaluators to be as

There is no checklist to evaluate judgment, insight, creativity, knowledge, patience, dedication, and persistence.

fair as your current one. And, since evaluators will value various qualities differently, it will not accurately compare teachers who are competing for merit-based pay and promotions. Therefore, it won’t provide

Ka Pi’ina the tool it needs to win the trust of teachers to the degree necessary for them to forever give up control of their steps and columns and let management’s performance evaluations determine their fate.

So, where are we in this Ka Pi’ina nightmare? We have a monster that’s not what it pretends to be. Claiming to be a reward and recruitment benefactor, it offers young teachers the possibility of fast track promotions and experienced teachers the possibility of new status and fancy titles with higher pay. All it wants in exchange is your trust, your annual step and your college credit column advancement option. What’s scary is there is no assurance or track record to earn that trust, no reason to believe that sufficient enticements will materialize or be correctly awarded, and there is

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the absolute certainty of the KS power grab where every facet of your pay will forever be beyond your control and subject to future pay cuts.

Then there are the inconsistencies that breed suspicion and fear. If Ka Pi'ina's motive is to reward, retain and inspire excellence why create all the anxiety by completely abandoning a pay structure that is generally regarded as clear and fair?

Why is management so unconcerned and void of reassurances regarding school climate and our collaborative learning environment? Why have they expressed no concern about the obvious lack of enthusiasm teachers have for this program? If our finances are so insecure

that we can't afford our annual step (which costs KS nothing), how can we afford a \$1.5 million "pilot" that looks more like Phase 1 of Ka Pi'ina implementation than a test to see if we want it? Why has management invested so much time, effort and money in this deceptive monster? Perhaps they confuse control with leadership and believe excellence can be achieved through ridged accountability and intrusive evaluations.

What do you want KSFA to do on your behalf regarding Ka Pi'ina? I can think of two options.

One, we can play the "wait and see" game

and let KS spend more time and money on another "pilot." The "up side" of this option is that KS may decouple evaluation from pay decisions and use evaluations only for performance improvement. But, performance evaluation is a management right and KS doesn't need Ka Pi'ina or KSFA approval to change its evaluation procedures. The "down side" is that by not taking a stand we could be incrementally phased into Ka Pi'ina with the last step being "We're sorry. We changed our minds. Let's recouple evaluations and pay." Like the frog in the pot on the stove, we may be boiled before we have the sense to escape.

Or two, we can exercise our legal right to bargain on pay by conducting a ratification vote this school year or early next school year to determine whether KSFA members are going to accept or reject management's Ka Pi'ina pay proposal which would have our steps and columns determined by their evaluation rather than by years of service and academic credits. The "up side" depends upon how the vote turns out. I don't think there is much of a "down side." If KSFA rejects Ka Pi'ina, we will still get to see how it works in the KS schools that don't have a choice. If it turns out to be the great recruiting and retention tool the authors claim it is, they have no reason not to let us try it too. In effect, we would be letting the other schools really pilot this program at a lower cost to KS.

What do you want KSFA to do? Contact your KSFA representative. Their names are on this newsletter. They are anxious to get your input and will be available after unit meetings if you want to use that opportunity to discuss your thoughts on Ka Pi'ina.

— Bill Follmer, unit 11-12

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