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THE AMERICAN SCHOOL BOARD

JOURNAL[®]

1055 THOMAS JEFFERSON STREET, N.W. / WASHINGTON, D.C. 20007 / (202) 337-7666

Mr. Michael Deaver
Deputy Chief of Staff
The White House
Washington, D.C. 20500

Dear Mr. Deaver:

The September issue of our magazine, which will be mailed in a few days, contains some rather startling news about teachers and merit pay:

U.S. Teachers like the idea of merit pay a whole lot better than teacher union leaders do. Nearly two-thirds of the representative sample of classroom teachers polled by The American School Board Journal say their raises should be based on their performance in the classroom. This basic approval of the merit pay concept holds true regardless of whether the teachers are union members or not.

The results of our nationwide survey, along with a number of additional copyrighted articles on merit pay for teachers, are enclosed for your information. If you do decide to use any of the facts from this material, it would help my career enormously if you'd mention our magazine.

Thanks a million.

Cordially,



Gregg W. Downey
Editor and Assistant Publisher

P.S.: Survey responses were tabulated and the results verified for statistical accuracy (with an error factor of plus or minus 6.2 percentage points) by Jim C. Fortune, professor of education at Virginia Tech, Blacksburg.

Our nationwide poll: Most teachers endorse the merit pay concept

By Marilee C. Rist

HOLD ON to your hat: Nearly two-thirds of U.S. teachers endorse the core concept of merit pay. That's the startling finding of a nationwide, statistically representative sample of U.S. teachers conducted by *The American School Board JOURNAL*. A clear majority—62.7 percent—of teachers responding agree that teachers should be paid according to how well they perform in the classroom. And that endorsement holds true no matter how you look at it—regardless of teachers' age, sex, or marital status; what region of the U.S. they live and teach in; whether they belong to the National Education Association (N.E.A.), the American Federation of Teachers (A.F.T.), or no teacher union; whether they teach at the elementary or secondary level; whether they're tenured and have been teaching 20 years or un-

(More on the statistical breakdowns in a moment.)

Our survey asked teachers three questions related to merit pay: (1) It asked them to agree or disagree with the statement, "Teachers who are more effective in the classroom should receive larger salary increases than teachers who are less effective"; (2) it asked them to identify *who* should evaluate teachers' classroom performance; and (3) it asked *how* they think teacher salary increases should be determined.

We sent out our survey in May 1983 to a randomly selected sample of some 7,300 teachers across the U.S. Of these, 1,261 responses were tabulated and verified for statistical accuracy by professors of education Kenneth E. Underwood and Jim

Marilee C. Rist is an associate editor of the *JOURNAL*.

GRAPH
To Come

C. Fortune of Virginia Tech in Blacksburg, Va. The responses we received were proportional to overall numbers of teachers nationally in the following categories: union membership, sex, tenure status, school level (elementary, middle, junior, or senior high school), marital status, and community type (urban, suburban, rural). The only category slightly overrepresented among the responses was older teachers—specifically, those who've been teaching for 15 years or longer.

The *JOURNAL* undertook the merit pay survey because of a glaring lack of information: Until now, no one we know of has asked *teachers* the simple question of whether they think merit pay is a sound idea. Perhaps no one has asked the question because the merit pay issue is not simple: Merit pay means different things to different people. We based the *JOURNAL* survey questions on the widely ac-

cepted idea that merit pay is a monetary stipend or salary increase paid for superior performance, as determined by a classroom performance evaluation.

Even that definition isn't guaranteed to be accepted without question: Before most teachers are willing, for example, to consider the idea of being paid according to classroom effectiveness, they want to know *who* will do the evaluating. Our survey sought to address this concern with the following question: "For purposes of performance appraisal, the person or persons with the *greatest* say in rating teacher effectiveness should be: (1) principal, (2) central office curriculum specialists, (3) committee of teacher peers, (4) subject-area department heads, (5) other [please specify]."

The respondents' first choice: A full 39 percent want their principal to evaluate their performance. After

the principal rank the following: teacher peers, 25.4 percent; department head, 15 percent; a combination of administrators and other teachers, 12.1 percent; curriculum specialist, 5.5 percent; various others (such as outside experts or students), 3 percent.

To find out *how* teachers think salary increases should be determined, we asked them to check one of the following choices: Salary increases should be determined (1) by classroom effectiveness alone, (2) by seniority/academic credits alone, (3) by a combination of these two factors, with greater weight given to effectiveness, (4) by a combination of the two factors, with greater weight given to seniority and credits, and (5) by a combination, ~~with both factors weighted equal~~

The response: Once again, teachers say Yes to classroom effectiveness—in numbers far larger than the popular wisdom

weighting both factors equally

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27).

would have you believe. They say Yes, as long as the salary-determining criteria are *combined* with seniority and academic credits in some way. A striking 41 percent of the respondents say effectiveness and seniority/credits should be given *equal* weight in determining salary increases. Another 26.8 percent believe both factors should be considered, with greater weight given to effectiveness. As for the stance traditionally taken by the teacher unions, only 17.6 percent of teachers themselves want seniority and academic credits to be the *sole* criteria for determining teachers' salary increases. An additional 11.5 percent would like both factors considered, with greater weight given seniority and credits.

Keep this in mind, however, if your school system is considering a merit pay system based on performance alone: Only 3.1 percent of the respondents would like to see classroom effectiveness used as the *only* standard for salary increases. (In short, trying to impose such a single-issue pay system could pit your teachers against you right from the outset.)

Interpreting the raw facts of our findings too broadly could be dangerous, of course. Many respondents added a full

page of comments to their survey responses, explaining and qualifying their answers (see article on page 99). Nevertheless, our findings suggest that teachers don't intend to be left out in the cold on the merit pay issue. Teachers seem to be saying, "If the President can use merit pay in his campaign for high-quality education; if the American public agrees with him that we should be paid on the basis of merit; if the teacher unions themselves are softening on the issue—then we want our opinions known, too."

Here's a closer look at what our study revealed:

✓ Classroom effectiveness

Pegging teacher salary increases to classroom effectiveness is the heart of the merit pay question—and 62.7 percent of the teachers who responded to our survey agree that more effective teachers should receive greater salary increases than should less effective ones.

That's contrary, of course, to the longstanding union position: The two leading teacher unions—the American Federation of Teachers (A.F.T.) and the National Education Association (N.E.A.)—traditionally have opposed the merit pay notion with

the contention that it's unworkable and opens the door to favoritism. Their stance: The only objective, even-handed way to differentiate among teachers for salary purposes is by seniority and training (more specifically, academic credits.)

Lately, both A.F.T. and N.E.A. have begun to ease their positions somewhat—A.F.T. even more than its competitor (see related stories on pages 90 and 99). But teachers responding to the JOURNAL survey appear to be way out in front of the union leadership on the merit pay issue: 61.5 percent of respondents affiliated with N.E.A. and 62.1 percent of those affiliated with A.F.T. say Yes, salary increases *should* be pegged to classroom effectiveness. An even greater percentage of nonunion teachers—76.4 percent—approve of the idea.

What's clear from these data is that making salary increases contingent at least partially on merit is an idea teachers are willing to consider—no matter what you've heard in the past. And that's true for all kinds of teachers, with some intriguing, though minor, demographic differences. A few examples:

- *Years in teaching.* Younger, newer teachers are more likely to say raises

To Come

should be tied to effectiveness than are those who've been in teaching 15 years or longer. The details: 62.7 percent of *all* respondents agree with the statement, and 59.1 percent of those who've been teaching 15 years or longer agree. By contrast, a whopping 85.3 percent of teachers in the profession for fewer than three years agree that salary increases should be pegged to classroom effectiveness.

All this makes sense: Older teachers tend to be at the top of the pay scale in their school systems and therefore have a vested interest in keeping the salary schedule as it is. (Another possible interpretation, of course, is that they have a greater appreciation of the potential pitfalls of implementing a merit pay program.) Newer teachers, on the other hand, tend to be on the lower rungs of the salary ladder—and have much to gain by going to a merit pay system. But remember: Although older teachers agree less often, the difference between them and younger teachers is slight. A substantial majority of older teachers, like their colleagues, approve the merit pay concept. (After all, older teachers, by their years of experience, also could benefit by being paid according to classroom effectiveness.)

• **Tenure.** Nontenured teachers are more likely to agree with the merit pay idea than are tenured teachers—although, once again, the majority of both still agree with the core concept of merit pay (70.2 percent of nontenured and 61.2 percent of tenured teachers agree). And this finding, too, makes sense: Both tenured and nontenured teachers could benefit by being paid on the basis of merit; but tenured teachers—who are installed in their positions, with both seniority and advanced training under their belts—are less likely to want changes in the current salary system.

• **Sex and marital status.** Whether teachers are male or female, married or not has only a minor influence on their opinions about being rewarded for classroom effectiveness. Male teachers agree with the core concept of merit pay (66.3 percent of the men) more often than do female teachers (59.9 percent of the women). Married teachers agree more often (64.1 percent of the married teachers) than do teachers who are single (59.6 percent of the single teachers), divorced (56.6 percent of the divorced teachers), or widowed (52.2 percent of the widowed teachers).

• **School type.** The higher the grade level taught, the more likely the teacher

is to agree that teachers should be rewarded according to classroom performance: 55.3 percent of elementary school teachers, 64.7 percent of middle school teachers, 65.7 percent of junior high school teachers, and 69.2 percent of senior high school teachers endorse the core concept of merit pay.

• **Community type.** Although the differences are slight, one cautious conclusion might be drawn: The more urban the community, the less likely teachers are to agree that they should be rewarded on the basis of classroom effectiveness: 59.4 percent of the urban teachers; 63.7 percent of the suburban; and 64 percent of the

But U.S. teachers oppose scarcity bonuses

Teachers endorse the core concept of merit pay (see article beginning on page 99), but they take a dim view of school systems paying bonuses to colleagues who teach in understaffed subject areas (such as science and mathematics). Indeed, according to 68.4 percent of teachers responding to the JOURNAL survey, such bonuses are unacceptable.

Bonus plans or differential pay programs—whereby school systems offer bonus stipends or higher salaries to individuals teaching subjects in which a shortage of teachers exists—are a separate issue from merit pay, to be sure. Nevertheless, our survey asked teachers about the bonus pay issue because some school boards are considering such plans to attract more qualified teachers to certain subjects.

An example is Houston's Second Mile Plan. It works this way: Teachers who are absent five days or fewer during the school year are eligible for bonuses of from several hundred dollars to \$2,000 if they meet a "critical need" of the school system. Teachers meet critical needs if they teach mathematics, science, or bilingual education; if they teach in an inner-city school; or if they teach in a school where students improve their overall performance.

Bonus plans are controversial, and the teacher unions firmly have opposed them as demoralizing and unfair. But we wanted to find out what teachers themselves think about bonuses in shortage areas.

Only 31.6 percent of teachers agree with the following statement we posed in the survey: "If a shortage of teachers exists in a specific discipline (English, music, mathematics, science, and so on), the school system is justified in offering teachers specializing in that discipline extra financial incentives (bonus

stipends or higher than customary salaries, for example)."

Rejection of the idea doesn't depend on a teacher's grade level—elementary, middle, junior, or senior high school. Nor does marital status, sex, or community type make a difference in teachers' attitudes toward bonuses.

What *do* make some differences are years in teaching, union membership, and tenure status. The specifics: Of those who've been in teaching three years or fewer, 47.1 percent think bonuses are acceptable. Union affiliation also makes a difference: 50 percent of nonunion teachers approve of bonus plans; but only 30 percent of teachers who are affiliated with a national union approve of such plans. And nontenured teachers are more likely to approve of bonus systems (41.5 percent) than are tenured teachers (30 percent).

What these data suggest: Teachers who are established in teaching and in a higher position on the salary schedule don't like the idea of some teachers being treated as special. But those who are new to teaching, are at the bottom of the salary ladder, haven't bought into the union stance, and aren't sheltered by tenure are more likely to think that the benefits of a bonus plan outweigh its disadvantages.

Not surprisingly, a teacher's subject specialty also makes a difference in whether that teacher likes bonus plans: 62.3 percent of science teachers think bonuses are acceptable, as do 62.4 percent of mathematics teachers.

Which teachers think the *least* of bonuses? Only 19 percent of vocational education teachers, 18.9 percent of social studies teachers, and 16.4 percent of English teachers think bonus plans are an acceptable way to overcome staffing shortages.—M.C.R.

rural teachers agree with the basic idea of merit pay.

✓ Who should evaluate

If teachers are going to be given salary increases on the basis of classroom effectiveness, someone has to judge which teachers are effective and which aren't. We asked teachers who should do that judging. Although a plurality (39 percent) of respondents say the principal should do the evaluating, some differences appear among union and nonunion teachers, as well as among those who teach at different grade levels.

- **Union membership.** Teachers who are *not* members of N.E.A. or A.F.T. choose their principal 52.2 percent of the time—far more often than the 39.2 percent of N.E.A. members and the 33.1 percent of A.F.T. members. Union members, by contrast, stick with their peers: 25.4 percent of N.E.A. members and 27.5 percent of A.F.T. members prefer having other teachers evaluate them. Among teachers who belong to neither union, only 18.8 percent want other teachers to judge their classroom performance.

- **School type.** Elementary school teachers—56.3 percent of them—prefer to have their principal evaluate their classroom performance. The higher the grade level taught—and the more likely that teachers must specialize in certain subject areas—the less they tend to choose their principal for performance appraisal: 38.9 percent of middle school teachers, 28.8 percent of junior high teachers, and only 21.4 percent of high school teachers want the principal to do the evaluations.

So for those who eschew the principal, who *is* preferred as the evaluator? Respondents divide their choices primarily between other teachers and department

ATTENTION researchers, administrators, school board members, and others interested in studying the full results of the JOURNAL's survey of U.S. teachers' attitudes toward merit pay: A copy of the complete survey—including state-by-state breakdowns—is available for \$95. You get a full print-out of computer-run tabulations and cross-tabulations for all survey variables, including various correlational analyses. Send your check or purchase order to: *The American School Board JOURNAL*, 1055 Thomas Jefferson St. N.W., Washington, D.C. 20007. Allow six weeks for delivery.

heads. Middle school teachers choose peers 22.2 percent of the time and department heads 16.3 percent; junior high teachers name peers in 28.8 percent of the cases and department heads 21.2 percent. High school teachers prefer peers (31.3 percent), but also would accept department heads (28.1 percent). And that makes sense: If you teach biology, you'd probably prefer to have another biologist evaluate your effectiveness as a teacher.

✓ How to determine raises

Teachers are remarkably united in how they think salary increases should be determined. Effectiveness, they say, should be considered along with seniority and

credits. Years in teaching, type of school, community type, sex, marital status, teaching specialty, region—none of these factors seems to influence their opinions. Indeed, the only two categories in which any differences stand out are union membership and tenure status.

- **Union membership.** Teachers who are *not* affiliated with N.E.A. or A.F.T. stand out from the crowd: Although 41 percent of teachers as a whole think effectiveness and seniority/credits should be given equal weight in determining salary increases, only 34.3 percent of nonunion teachers want the two factors weighted equally. And they're also less likely to want seniority/credits alone to determine increases: Compared with 17.7 percent of all respondents, only 11.4 percent of nonunion teachers opt for seniority/credits alone.

Union members make much the same choices as teachers as a whole—17.4 percent of N.E.A. members and 22.4 percent of A.F.T. members say seniority/credits should be the sole determinant of raises.

Here's what nonunion teachers think *should* determine salary increases: 42.9 percent say both effectiveness and seniority/credits should be considered, with classroom effectiveness given more weight. (Compare that with the 26.6 percent of all respondents who favor that option.)

- **Tenure status.** Like nonunion teachers, nontenured teachers also stand out from teachers in general. Nontenured teachers are even less likely than the others to choose seniority/credits as the sole criterion (10.4 percent compared with

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17.7 percent of all respondents). And nontenured teachers are more likely to say both factors should be considered, with effectiveness given more weight (34.9 percent compared with 26.6 percent of all respondents). All this seems reasonable: Tenure is determined chiefly by seniority and academic credits, so nontenured teachers wouldn't benefit from a pay system based on these two items alone.

✓ An issue for the national agenda

Merit pay, it's clear, is a front-burner political issue—for the moment, at least. The Reagan Administration, equating merit pay with high-quality education, recently has been spearheading the call for paying teachers according to merit; and according to a recent *Newsweek* magazine poll, 80 percent of the American public agrees. In a society that prides itself in al-

lowing cream to rise to the top, that's not surprising.

What is surprising, in view of traditional union rhetoric, is the support you're likely to get if you play your cards right. If your board wants to implement a fair, objective system giving the better salary increases to the more effective teachers, our survey makes it clear: The teachers are on your side. □

Teacher comments: from growls to gratitude

Although the teachers who responded to the JOURNAL's survey endorse the idea of merit pay (see article beginning on page 23), they also see its awesome complexities. Many wrote comments about merit pay and its various advantages and disadvantages; others added detailed explanations of why they responded the way they did; a few even wrote us impassioned letters. Here, then, is a brief rundown of some of the comments teachers have about merit pay, grouped according to sentiment:

- **Merit pay will improve education:** A Wisconsin teacher with 16 years of classroom experience writes, "The only way to achieve excellence in education is to reward the excellent teachers and get rid of the deadwood." Adds a four-year teaching veteran from North Dakota: "Talented teachers who excel should receive merit pay. The concept of salary schedules serves only to protect average and below-average teachers."

- **Merit pay is unnecessary:** Writes an Ohio teacher who has logged 22 years as a teacher: "In most cases, an ineffective teacher is weeded out through the ordinary evaluation process—if administrators are doing their jobs effectively." A North Carolina teacher with seven years of experience says, "Teachers who are ineffective should not be teaching. All merit pay does is cause discord among members of the teaching profession. . . . Performance appraisals need to be done to help identify a teacher's possible weaknesses, so that the teacher can improve. These appraisals should also identify strengths."

- **Merit pay will raise the quality of teaching:** A 15-year teaching veteran from Illinois comments, "The teachers who have chosen not to work as effectively as they might have now seem in-

vulnerable to administrative pressure. [Along with instituting merit pay,] schools should lobby to abandon tenure and seniority and spend time creating a viable employee evaluation instrument." A California teacher with 24 years of classroom experience writes, "Higher pay for the more effective teacher . . . would, in my opinion, be a real incentive for other teachers to improve."

- **Merit pay opens the door to favoritism:** From Illinois, a teacher with 14 years in the classroom asks, "How could any of us dare to be active in our teacher association if we were evaluated by the same person with whom we are sometimes at odds?" And a New Jersey teacher says, "The idea of merit pay is good but determining who is worthy of it is another matter."

- **Effectiveness is hard to measure:** A New Hampshire teacher states simply, "There's no fair way of determining merit." And cautions a Georgia teacher: "To determine the effectiveness of a teacher is very difficult. It would be almost impossible to do without observing the teacher every day, all day." A 13-year teaching veteran from Illinois asks, "How do you determine the effectiveness of an advanced placement chemistry teacher versus the effectiveness of a . . . special education teacher who works with five severely handicapped students?"

- **The people who determine which teachers will receive merit pay will be viewed with suspicion:** Comments a New York teacher: "If merit pay were to be decided by the hierarchy of our district, it would be grossly unfair. Those who have been selected to 'lead' us have a minimum of experience and competence in the classroom, yet they

would decide who is effective. What happens the year a teacher has a particularly slow class or emotionally handicapped class and is judged on the rate of passing/failing? I see too much room for human error."

- **Raise all teacher salaries:** Asks one teacher: "How can anyone criticize or penalize one teacher over another when everyone is working so conscientiously and everyone's grossly underpaid?"

- **Don't abandon seniority:** A California teacher says, "I have taught for 26 years. This year has caused me to feel great pressure. I believe the administration would like me to leave, which would allow the schools to hire two less expensive teachers. Somehow, the system has to protect people like me, as well as attract new teachers."

- **It's going to take more than merit pay to improve the quality of education:** A teacher with seven years of teaching experience in Tennessee writes, "I feel that all teachers should be paid more, but that's only one thing we need to improve the status of education. [Also needed:] increased federal funding; increased local and state funding; a school day that's filled with basic studies, not social progress courses; at least three years of mathematics in high school; and parents' concern for education."

A few teachers were incensed that the JOURNAL asked for their opinions: "You think teachers are fools," writes one. "How dare you." Another says, "You must think teachers are nincompoops if you expect them to respond to a questionnaire that's a stacked deck."

Not all teachers feel that way, of course: A California teacher with 21 years of teaching experience says, "Editors, thank you for soliciting the views of teachers on this issue."—M.C.R.

Yes—merit pay can be a horror, but a few school systems have done it right

By Jerome Cramer

THE IDEA OF pay for performance makes perfect sense to most school board members, administrators, taxpayers, and even teachers (see the results of an exclusive JOURNAL survey beginning on page 23). But putting merit pay plans into effect in your schools will be the challenge of the decade, calling on all the human relations and management skills your board can muster. The reason for this, of course, is that it's a highly emotional issue (as are all pocketbook concerns) about which nearly everyone has an opinion: Teacher unions traditionally oppose merit pay, on the ground that it rewards a few to the exclusion of the majority of competent teachers; principals are understandably wary of it, because they often are the ones responsible for determining which teachers will receive merit bonuses; and the public clamors for any measure that will attract and keep good teachers.

The issue is not new. According to the Educational Research Service (E.R.S.), the first formal merit pay plan for teachers was created in 1908 in Newton, Mass.; by the 1920s, merit pay was the preferred system of compensation in the majority of U.S. school systems. It was preferred, according to one education researcher, because it allowed school systems to pay men more than women, white teachers more than blacks—in short, because it allowed school boards to be autocratic and paternalistic in dealing with teachers. With the advent of tenure laws, salary schedules, and teacher unions, however, merit pay fell out of favor. Currently, says E.R.S., fewer than 4 percent of school systems in the U.S. use merit pay plans for compensating teachers.

The recent attention paid to the concept of merit pay comes from a curious source: Hungry national politicians, prowling for a campaign issue, seized upon a single sec-

tion of the report of the National Commission on Excellence in Education; the section reads, "Salary, promotion, tenure and retention decisions should be tied to an effective evaluation system that includes peer review so that superior teachers can be rewarded, average ones encouraged, and poor ones either improved or terminated."

This portion of the commission's report was music to the ears of Secretary of Education T.H. Bell, who has written about merit pay as a concept since the early 1960s. (In 1963, in fact, while he was a school administrator, Bell wrote an article for *The American School Board Journal* entitled "Twenty keys to successful merit ratings.") Most educators in the late 1960s and '70s ignored the issue of merit pay—when teacher unionism was on the rise—but Bell remained a true believer. Soon after last spring's well-publicized commission report was released, President Reagan picked up Bell's enthusiasm for the idea of merit pay and began stumping the country and making it a national political issue.

The Reagan Administration, whose main education concerns previously had been limited to support of tuition tax credits for private schools, abolishment of the Department of Education, and dedication to the reinstatement of school prayer, suddenly discovered it had a political issue: Like a batter lunging at a hanging curve ball, political strategists in the Administration leaped at an issue that pitted concerned parents against giant teacher unions (whose leaders traditionally support Democrats). These strategists placed the President on the side of popular public opinion against the unions' vested interests. In the words of Yale University President A. Bartlett Giamatti, merit pay was a tailor-made political issue because "The teachers have a fundamental problem . . . On one hand, they wish for the attention they deserve; and on the other hand, they object to what millions of people already go through—undergo-

ing evaluation in order to get additional reward."

Within a matter of weeks, merit pay for teachers was plucked from the pages of education journals and placed in the ranks of topics being bandied about on television talk shows and editorial pages. The public was faced daily with angry teacher union leaders denouncing merit pay as "union busting," and politicians, including many school board members, avowing that merit pay makes sense and should be practiced in all school systems.

The trouble with the debate we all witnessed is that both sides are dead wrong. Teacher union members who adamantly oppose merit pay ("It's never worked, and it's never going to work," said one enlightened official of the National Education Association) and school officials who think it should be started tomorrow either are naive or misinformed. Fact is, merit pay can work and does work. But if it isn't handled with caution, it will blow up in your face—turning now-recalcitrant union leaders into prophets.

To make merit pay work in your schools, you must study it and plan for its debut. Put simply, merit pay is a compensation system that pays performance bonuses to teachers who—through some system of evaluation—are recognized as being effective at their jobs. The debate rages, however, over *how* those good teachers are evaluated and selected and over *who* makes that determination. Teacher union leaders fear that merit pay will be used as a means to punish the majority of teachers (who are underpaid to begin with, in the eyes of most objective observers), while helping only a handful of teachers who are singled out as meritorious. "Merit pay has been used time and time again in the past to pay a few people more so that many more could be paid less," according to Willard McGuire, who recently completed two terms as president of the National Education Association (N.E.A.), the largest teacher union in the

(Continued on page 33.)

Jerome Cramer is features editor of the JOURNAL.

(Continued from page 28.)

U.S. He adds, "Perhaps the most serious fault is that merit pay assumes that only a small percentage of teachers is meritorious—and that [those teachers] can be identified."

According to Glen Robinson, president of E.R.S., McGuire's position might not be altogether wrong—based on the past record of merit pay plans that have failed. Robinson says the reason many merit pay plans bite the dust in public schools is that the most important component of the plans—evaluation of teachers—has been weak or unfair. Also contributing to the failure: "Much of the pressure for merit pay for teachers has come from individuals or groups who resent incompetent teachers in the classroom," Robinson says. The response to this pressure to get rid of poor teachers, he says, has been "to institute some type of merit pay plan that rewards superior teachers" but virtually ignores the average or less-than-average teacher. According to administrators and board members whose school systems run successful merit pay programs, the practice of using money as a tool to punish some teachers while throwing dollars at a handful of other teachers selected as superior can lead only to disaster.

Consider the case of Penn Manor School District in Millersville, Pa. Last May, the school board handed out \$1,000 merit bonuses to 25 of its 215 teachers. The board created the bonuses with the best of intentions: to provide an incentive for other teachers to strive for excellence. Instead, the plan blew up like a cheap carnival cigar, angering a number of teachers—including some of the ones who received the bonuses.

Barbara Andrew, an English teacher who received one of the \$1,000 awards, was "horrified" by the impact of the bonus on her fellow teachers. "[Teachers] receive very little praise throughout their careers—from students, from parents, or from administrators," she says. "Thus, to keep on teaching, [teachers] must develop their own self-confidence, fed mostly from within. When nearly 90 percent of teachers are told they don't measure up, their confidence is shattered."

A major problem the Penn Manor plan faced was a lack of funding. Assistant Superintendent Jerry Brooks says that when the committee charged with evaluating teachers narrowed down the field of candidates, 58 teachers were considered exceptional. "By our measure, these teach-

ers were outstanding," he says. But the choice was to divide the money among 58 teachers or narrow down the field further and give sizable chunks of money to a few. The school board, which originally slated \$20,000 for bonuses, upped the kitty by \$5,000 and decided the bonuses would be \$1,000 each.

This is exactly the kind of thinking that infuriates teacher union leaders; it also usually spells defeat for the merit pay plan. "Suppose you go into my building and you decide . . . to identify 15 percent [of teachers as meritorious]," says new N.E.A. President Mary H. Futrell. "But when you conduct the evaluation, you determine that 30 percent meet the standards you set. What do you do with the other people?"

Penn Manor's Brooks counters that a merit pay program, however imperfect, is better than no plan at all. Unfortunately, this reasoning doesn't mean much to teachers who have to face friends and spouses who want to know why they weren't selected for merit pay (astonishingly, this school system announced the winners publicly). One Penn Manor high school science teacher commented that when he was not listed as a merit winner in the local newspaper, his family and friends viewed it as evidence that "I'm not excellent in my field."

Fredric Genck, school board president in Lake Forest, Ill., and a management consultant familiar with merit pay plans, says Penn Manor's experience is typical of the trouble school systems can encounter when they adopt ill-conceived programs: "Many school board members want to be cautious and start out with a small program, hoping that it can be expanded. But with merit pay, that approach won't work. Unless you plan carefully and include your entire teaching corps in an evaluation plan that it helps develop, your merit pay plan is doomed to failure."

Involving all teachers in an evaluation and merit pay plan has proved successful in Dalton, Ga., where merit pay has been in operation for 20 years. In Georgia, the state department of education sets base-level salaries for different categories of teachers (according to their academic degrees and hours of postgraduate study). School systems can use local funds to provide merit pay supplements to the teachers' base pay.

In brief, the Dalton plan works like this: Each teacher is placed on the state

pay grid depending on level of education (bachelor's degree, master's degree, master's degree plus 15 hours of credit, master's degree plus 30 hours of credit); each of these levels also has locally developed, specific performance criteria that measure merit. (These criteria become more challenging as teachers' experience and levels of education increase. Teachers in Dalton over the years have had a major voice in determining the performance criteria. All evaluations are conducted by the teacher's principal and are reviewed by the superintendent.)

According to Frank Thomason, assistant superintendent, the merit pay increases Dalton teachers earn are substantial. "Good teachers might make between \$2,000 and \$3,000 extra each year if they are rated as superior," he says. Thomason adds that teachers tend to trust the principals' evaluations, because all of the system's administrators are required to attend classes on performance evaluation and be certified by the state as evaluators.

A unique aspect of the Dalton program is that the merit pay decisions can be appealed by teachers. "We sometimes have one or two teachers who feel that they have not been treated fairly," says Bill Weaver, director of personnel, "so these teachers meet with the superintendent and principal and work out a plan and are re-evaluated in December of the next year. If the teacher meets the goals that are agreed upon—and most all teachers do—their merit pay raise is retroactively worked into their salary schedule." The major strength of the program in Dalton, says Thomason—a crucial condition unsuccessful merit pay programs often lack—is that *all* teachers who are performing up to expectations receive merit awards. "Some earn more or are rewarded more than others," he says, "but just because one teacher is awarded \$200 more than another doesn't mean both teachers aren't valuable."

Most observers agree that merit pay works best in school systems where (1) the amount of money offered provides a real incentive to improve performance, (2) all teachers in the system are evaluated on the basis of agreed-upon criteria, and (3) evaluation is conducted with fairness.

All three components exist in Ladue, Mo., a wealthy school system outside St. Louis, where a merit pay plan has worked for 30 years. Superintendent Charles McKenna, who quietly has run the program for 20 years, says simply, "The program

makes sense. We're not trying to be evangelistic about this; we don't want to convert anybody. But merit pay works."

In Ladue, teachers are awarded up to 15 points (each worth \$300) based on performance. "We have categories that cover how teachers work with pupils, parents, and colleagues; how they improve themselves professionally; and how they work to improve the curriculum within the school and the system," says the superintendent. Like the merit pay program in Dalton, Ga., Ladue teachers who are in higher pay grades (based on seniority and education level) are expected to perform at a higher level to meet their goals.

McKenna says merit pay has brought stability to the teaching staff: "One of the biggest problems in most school systems is that very bright teachers get stale after five or six years and leave for other professions. A merit pay plan won't get teachers rich, but it will give them a chance to shoot for higher goals and to be rewarded for their performance."

McKenna adds that less-than-wealthy school systems also can use merit pay to reward teachers, pointing out that private companies often use merit pay even when they are facing tough financial times. "If a company has a bad year and there isn't much money to be spread around, most of them still offer raises based on merit," he says. "Administrators and school boards should adopt the notion that any increase given should be based on performance."

Consultant and board president Genck couldn't agree more. He recently published a book on improving school system performance. In it, he writes that the move toward merit pay is the opening salvo of a "public management revolution." What's more, Genck says, "Any school board member who is spending the public's money on teacher salaries without pay-for-performance plans should be thrown out of office. These boards have been abusing the public's trust—and taxes."

After working with more than a hundred school systems on evaluation programs, including merit pay programs, Genck says the philosophy of any school system—with hard work and careful planning—can be molded to allow a merit pay program to succeed.

"You can't develop a merit pay plan and push it from the top down," Genck warns. "Merit pay is going to be a difficult change for teachers and administra-

tors, and you've got to give people time—perhaps two or three years—to adjust." He suggests that in a school system with a history of labor troubles, the subject of merit pay should be downplayed while teachers and administrators work on developing trust and new evaluation systems.

"Education is a human relations industry, and that's what makes evaluation of teachers so difficult," admits Genck. "Administrators and teachers have to develop evaluation plans that teachers accept as fair and beneficial. Once the system of evaluation is agreed upon—and teachers have to agree that performance can be measured by a system that they help develop—it's only a short step to pay-for-performance plans."

Teacher evaluations must use objective measures of success (such as increases in standardized test scores) as well as more subjective gauges (such as surveys of parental and teacher attitudes), all of which can be communicated to the public as justification for teacher raises. In Lake Forest, Genck says, the use of such measurements has "increased board confidence that money is being spent for good performance, raised teacher morale, and avoids the 'they only give us money to avoid a strike' attitude of some teachers."

Genck concludes, "Teachers who say merit pay doesn't work are just plain wrong. It's worked here [in Lake Forest] for ten years; test scores are up and steady, employee morale is good, and parents are happy with the schools."

In tiny Round Valley, Calif., a somewhat different merit pay plan has been operating for three years, thanks to the urging of School Board President Bruce Alexander. Alexander, who works for a company that pays employees bonuses based on productivity and performance, became convinced several years ago that such bonuses could work for teachers.

"We have only 30 teachers in our school system, and all of them should be paid more. But people don't want to tax themselves to pay for teachers when there is no way to differentiate between a good teacher and a mediocre teacher," he says.

Three years ago, during teacher contract negotiations, Alexander says, the board okayed the teachers' total salary request figure—on the condition that it be handed out as bonuses that would not be subject to grievance hearings. The teachers agreed, and the school board created a committee (which included teachers) to

find a way to measure teacher performance: individual performance in the classroom, performance as a team member (working with other teachers to develop new approaches to teaching or putting on inservice programs for other staff members), and a "creative section" in which individual teachers write their own programs for self-improvement to help meet the stated goals of the school system.

Each of the system's teachers meets with his principal at the middle of the year (for a progress report) and at the end of the year (for a final evaluation). The teachers bring materials to these meetings to back up their claims of performance: videotapes of class performance, lesson plans, records of test scores. The evaluation committee—made up of school board members and administrators—reads each of the teachers' plans and awards a score. A teacher who reaches all stated goals can receive a bonus of up to 15 percent of his salary, says Alexander: In the past three years, several teachers have reached this level (and three teachers have received no increase at all), but the average merit bonus handed out by the district amounts to a percentage just above the average increase paid to teachers in other area school systems.

"In the years we have worked on the program, I'd say that the board—and especially the community—is very pleased with merit awards," Alexander says. "We have been able to ask taxpayers for more money, because they recognize what they are getting for their taxes. We publicize the successes we are able to document through the merit pay approach [although individual teachers' performances are not publicized], and now citizens know more about the good things going on in their schools."

Alexander says he is most pleased, however, that "We treat teachers like professionals, and now we pay them like professionals. As a result, some of our best teachers have told me they are going to stay in teaching. Everyone likes to be rewarded and recognized for good work."

The current political stirrings aside, then, merit pay plans deserve your attention if for no other reason than that they can encourage your best teachers to stay right where they're needed most—in your classrooms. Your challenge is to guide the merit pay plan beyond the procedural difficulties. If you succeed, so do your good teachers and, ultimately, so do your schools. □

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Heed these voices of merit pay experience

If your board is considering a merit pay plan for your school system, take a tip from those who successfully have implemented such plans: Brace yourself for long sessions of persuasion and compromise. If you attempt to move too quickly or force merit pay on teachers without listening to their concerns and addressing their needs, your chances of success will diminish; or in the words of Ladue (Missouri) Superintendent Charles McKenna, "Don't try it that way unless you are only a couple of years away from retirement."

McKenna should know. He's run a merit pay program for 20 years. McKenna (and others the JOURNAL talked with) offer plenty of advice for school board members and superintendents who are interested in starting merit pay plans in their schools. Their insights:

- *If your state school code doesn't allow differentiated pay schedules, work with your legislators to pass laws or amend the state education code to permit merit pay.* Often the publicity needed to stir up public support for merit pay can be created during debates over proposed legislation in the state capitol—far from the front steps of your schools' central office building. This public airing can help you identify the supporters and opponents of merit pay in your school system long before the battle begins in your backyard.

- *Discuss your merit pay idea with administrators.* Before you broach the subject with teachers, make sure you have gathered ideas and opinions—and support—from principals and other key administrators. They can help you and your board determine how best to garner widespread backing for your plan. They also can help spot the individuals in your schools who will support (or oppose) such a plan. Also, develop with administrators informal strategies to handle possible criticisms, and do this before the plan is introduced. As McKenna says, "You don't want to get shot out of the saddle before the horse leaves the corral."

- *Make sure your merit pay plan doesn't penalize some teachers.* The idea of a performance-based pay plan is to measure and reward excellence, but many superintendents who have experi-

ence with merit pay insist that you can't reward some teachers unless all teachers who are performing up to expectations receive rewards as well. In other words, merit pay should be awarded *in addition* to reasonable pay increases.

- *Train principals and other evaluators to measure teachers' effectiveness on the basis of agreed-on criteria.* Perhaps the most frequently voiced complaint about merit pay plans is that they allow principals—who usually do the evaluations—to play favorites. Union officials claim that difficult teachers, unpopular teachers, and teachers who request a lot of help (but who are effective in the classroom) will be passed over in favor of less competent colleagues who "go along" with the principal.

You can defuse much of this criticism by making sure principals and other evaluators—perhaps department heads or central office staff members—learn evaluation techniques. If all your principals are taught to measure performance in the same way, and if they all apply uniform criteria that teachers understand, the fear of favoritism should be lessened. In Dalton, Ga., all principals receive formal evaluation training and are certified in performance evaluation techniques by the state. In Ladue, Mo., principals take part in five-day workshops that show them how to evaluate teachers under the district's merit pay plan. Such training, says Frank Thomason, assistant superintendent in Dalton, Ga., "makes principals better leaders, defuses charges of favoritism, and is essential if the plan is to succeed."

- *Make sure school system policies and practices reflect the role of principals as instructional leaders and personnel evaluators.* Scott Thomson, executive director of the National Association of Secondary School Principals, says his organization is cautiously backing the idea of merit pay, but he points out that most principals already are loaded with time-consuming tasks. If principals are to be instructional leaders—and they should be—superintendents will have to structure the principals' jobs to give them time to become sufficiently involved in evaluation. Dalton's Thomason says principals in his school system spend from six weeks to two months of

the school year working on personnel evaluations. "You can't tell a principal that he has to evaluate his staff fairly and then not recognize how this will change the principal's responsibilities and time commitments," he says.

- *Don't overlook the public relations aspect of merit pay programs.* Administrators and school board members who run merit pay plans agree: The public likes knowing that teachers are being measured and rewarded for excellent performance (although exactly which teachers get merit increases should be a confidential personnel matter). Ladue's McKenna says (and several Gallup Polls seem to confirm) that taxpayers will support school tax levies when citizens can see the results of their sacrifice. Your job is to let taxpayers know about the many forms of teacher excellence you are rewarding.

- *Make sure you have enough money available to make merit pay attractive to teachers.* Plans that allow only a few teachers—regardless of the number who qualify—to be recognized won't be worth the effort, says Fredric Genck, school board president in Lake Forest, Ill. (Teacher union leaders who are reluctant to accept merit pay might consent if your money is green enough.)

- *If teachers fight you about performance evaluation and merit pay, ask them to defend the existing lock-step salary schedule.* "Once you and the teachers agree that there are ways to identify excellence," says Ladue's McKenna, "it becomes almost impossible for teachers to defend the status quo."

Several of the school systems mentioned in this article have materials available that describe their evaluation and merit pay procedures in detail. If you'd like more information, send one large, self-addressed, stamped envelope per request to any or all of the following experts:

- Charles McKenna, Superintendent, Ladue Public Schools, 9703 Conway Road, St. Louis 63124.

- Fredric Genck, Institute for Public Management, 550 West Jackson Blvd., Chicago 60606.

- Frank Thomason, Assistant Superintendent, Dalton Public Schools, P.O. Box 1406, Dalton, Ga. 30720.—J.C.

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At A.F.T., merit pay might be just about to lose its taboo status

By Kathleen McCormick

THE AMERICAN Federation of Teachers (A.F.T.) is listening carefully to the national debate on merit pay and is willing to talk about it. That was the message, right from the start, at A.F.T.'s annual convention held in July in Los Angeles.

Although there was some speculation among the 2,400 delegates that longtime union president Albert Shanker would call during the convention for a reversal of A.F.T.'s historical opposition to merit pay, he did not endorse the concept or any specific merit pay plan. Instead, he opted to call for more time to study various proposals and to come up with some guidelines on merit pay that are in line with the union's philosophy. (More on that in a moment.) Before the convention ended, though, bits and pieces of the union's position coalesced into a basic outline of what any merit pay program would have to include to be supported by A.F.T. And that support, Shanker suggested, could be forthcoming soon.

The idea of merit pay seemed gradually to gain respectability among the delegates during the course of the convention. At first, there was a good-natured barb or two: Responding to a reporter's question during the convention's opening session, Shanker compared merit pay for teachers to singing in the bathtub: "I sing as well as I possibly can, and no matter what you paid me, I would not sing better." Then, to cheers and applause from delegates, Shanker gave the rallying cry: "We will not allow merit pay to become the one, single, dominant, exclusive issue in this national discussion" about improving the quality of public education.

Merit pay, however, came perilously

close to being *the* issue during the convention. Between speeches and workshops, in hotel lobbies and at poolside, talk was of whether (and how) teachers should be awarded extra pay for excellence in the classroom. Merit pay also became one of the arrows Shanker fired at the rival National Education Association (N.E.A.). He blamed N.E.A., in fact, for making merit pay "a life-and-death issue." Shanker

Shanker: 'We will not allow merit pay to become the one, single, dominant, exclusive issue in the discussion'

said, however, that it is important that the two teacher unions work together in responding to recommendations on how to raise the level of quality in education. And he made it clear that *his* union still opposes "traditional" merit pay plans.

The convention's focus on merit pay was difficult to avoid; the lineup of convention speakers included, at center stage, President Reagan, a recent and vocal proponent of merit pay. Although the delegates generally were cool (sometimes chilly) to the President, they applauded Reagan when he commended the union for "its fair and open-minded attitude about things like new approaches to differential pay" and for "demonstrating a willingness to examine new ideas." Another high-profile proponent of incentive

pay, Tennessee Governor Lamar Alexander also initially was received with less than unbridled enthusiasm by A.F.T. delegates. Yet Alexander was given a standing ovation at the end of his address, and Shanker told the delegates that Alexander's master teacher plan* "has enough freshness . . . that I think you'll agree that it deserves our consideration." Asked later whether he would endorse Alexander's proposal, Shanker said No. He said, though, that the union "ought to be able, fairly soon, to come to an agreement" on a merit pay concept—but not before the A.F.T.'s regional conferences scheduled for this month and next.

The next day, A.F.T.'s position on merit pay became a special order of business brought before the delegate assembly by the union's executive council. Part of the "education reform" package (which was passed by a ratio of about nine to one after a half-hour or so of debate) was an outline of A.F.T.'s interim position on merit pay. "Incentive pay or discretionary merit pay is not the first and best way to ensure teacher quality," the special order of business read. "Unfortunately, the public and the media are giving it more attention than it deserves. In fact, it is our fear that a preoccupation with this single idea will divert attention away from a set of proposals much more likely to solve the problem."

Included in the statement's enumeration of more important matters: tests and standards for all beginning teachers, tougher teacher certification requirements, a \$6,000-\$8,000 increase in first-year teachers' salaries, fewer and more generous salary steps, better classroom discipline, and fair and practical methods for removing incompetent teachers. The

*A.F.T.'s reaction to Governor Lamar Alexander's master teacher plan will be covered in greater depth in the October issue of the JOURNAL.

(Continued on page 49.)

Kathleen McCormick is assistant editor of the JOURNAL.

406 B/K

At N.E.A., leaders erect a wall of words around opposition to merit pay

By Ellen Ficklen

THE NATIONAL Education Association (N.E.A.) finally seems ready at least to discuss merit pay. But the union just might talk your ear off in the process.

Before this year's convention, held in Philadelphia over the Fourth of July weekend, N.E.A. was perceived as stonewalling on the issue of merit pay. The sole graffito on their wall: No way!

But as Robert Frost (and undoubtedly the English teachers at the meeting) could have warned the union, when you build a wall, you must be sure you know what you're walling in and walling out. To the dismay of top N.E.A. officials, the union discovered in late spring that if you say No long enough and loud enough, the public comes to perceive you as a naysayer. That, in turn, makes it easier for someone—Ronald Reagan, say—to imply that N.E.A. is a major roadblock on the interstate to excellence.

In response, new N.E.A. officials at the union's annual meeting did their best to peek out from behind their wall. "We are not negative," insisted President-elect Mary H. Futrell. "We are open to debate." Be that as it may, she and other officers made it clear that the union still retains its historic dislike and distrust of merit pay. Futrell put it this way: "We reject the term merit pay, as such. But it is only one of 36 items in the National Commission on Excellence in Education report. We are willing to debate all the recommendations. We know everything is not fine in the schools. But if all the debate is on merit pay, we're not talking about reform. We want that debate to be very broad."

This newfound willingness to talk seems to have a twofold purpose: It gives

N.E.A. a chance to explain exactly why the union is so convinced merit pay won't work, and it helps ensure that teachers will have a voice in whatever changes eventually are made in individual school systems.

Futrell's eagerness to broaden the debate notwithstanding, New Business Item D, which dealt with merit pay, was the hottest issue brought before the union's

406 B/K
As the *Post* was reporting stronger opposition, the *Inquirer* was saying N.E.A.'s stance against merit pay had softened

7,000 delegates. At stake was the union's official statement on the subject.

The new business item, entitled "N.E.A. Action Plan for Educational Excellence," is a lengthy, convoluted document that calls for a teacher task force (backed up by \$250,000) to help pursue excellence in education. Included is this statement: "N.E.A. is categorically opposed to any plan . . . that bases the compensation of teachers on favoritism, subjective evaluation in the absence of clearly defined performance criteria, student achievement or other arbitrary standards."

The item had the backing of the organization's board of directors, and Futrell spoke from the floor in its favor. But dissection was brewing, and five state associations—Maryland, Massachusetts, New

York, Pennsylvania, and Iowa—countered with a substitute proposal that was less specific.

The press, which descended on this year's "hot topic" convention in record numbers, clearly was looking for pithy quotes and floor fights during the debate. But the delegates didn't provide a floor show; they just voted down the substitute proposed and approved New Business Item D. Many disappointed reporters decided to pack up their notepads and go home. Clearly, watching thousands of N.E.A. delegates toe the line was not the Fourth of July fireworks they had expected.

But what, exactly, had the delegates approved when they voted for New Business Item D? No one is sure. The majority of delegates seemed to think they had passed a tough-talking document that slightly softens the union's opposition to merit pay and allows union leaders additional room for maneuvering, discussing, and negotiating. But the document also has been referred to as "weasely worded." As N.E.A. Vice-President-elect Keith Geiger rather injudiciously admitted at his first press conference, "There's going to be a lot of debate on what we passed."

One reporter seeking clarification of the document asked the officers for a one-sentence summary of N.E.A.'s position on merit pay. He didn't get it. It's not surprising, then, that while the *Washington Post* was reporting that N.E.A. has taken a stronger stand against merit pay, the *Philadelphia Inquirer* was telling its readers that the union had softened its stance on the issue. (What the statement actually does is allow the union's national leaders to make their own judgment calls.)

Then, at 4:30 p.m. on the last day of the convention, hardline opponents to merit pay attempted a clever parliamentary coup by trying to amend a resolution

(Continued on page 49.)

Ellen Ficklen is an associate editor of the JOURNAL.

A.F.T.

(Continued from page 36.)

statement also included this qualifier: "While merit pay is not an A.F.T. policy, under certain circumstances, state federations may feel the need to negotiate such plans." Finally, the following criteria for merit pay plans were included in the union's special order of business:

- Any new compensation plan should have as its core a higher base pay for all teachers.
- New teacher evaluation patterns should be negotiated at the bargaining table and must offer protections against subjectivity and local school politics.
- Teachers who don't receive extra pay should suffer no loss of tenure, job security, or status.
- Decisions to grant additional pay must be subject to appeals and review procedures that are fair and objective.
- Financial rewards must be part of a plan that is committed to improving the conditions and pay of classroom teachers—not simply adding new layers of administration.
- Applying for and receiving additional salary should be voluntary and open to all; discretionary pay also should be awarded to a substantial proportion of the teaching staff.
- Once additional compensation is made, it should not be subject to decreases at a later date.
- Evaluation criteria should reflect the complexity of all factors contributing to teacher and student success. Measuring teacher success simplistically—such as by using student achievement scores alone—should be opposed.

Finally, the kicker:

- Even if all these criteria are met, merit pay should not be imposed on teachers and should not be adopted unless local teacher unions have accepted the plans through collective bargaining or other appropriate action. □

N.E.A.

(Continued from page 39.)

under consideration by the delegates. By inserting a phrase saying the union was "unequivocally opposed" to merit pay and master teacher plans, they would have overridden and therefore nullified New Business Item D. (A resolution becomes official union policy; a new business item becomes an official union stance.) The amendment easily was voted

down, but the discussion beforehand shed a glimmer of light on the union's attitude: The delegates bristled almost automatically at the term "merit pay," but they seemed less ruffled by the term "master teacher." The delegates did, indeed, want their union to be included in discussions and negotiations on education reform—even if that means merit pay has to be discussed. (The phrase "unequivocally opposed" would have prohibited N.E.A. representatives from participating in such discussions.)

The floor debate also produced at least one easily understandable pronouncement on merit pay. When a delegate asked newly appointed N.E.A. Executive Director Don Cameron for clarification on the subject, Cameron put it this way: "We are opposed to merit pay, but we are willing to sit down and talk about anything."

Not exactly a wall-crumbing statement, but a bit of N.E.A.'s old resistance could be sagging. □

Mashochists

(Continued from page 46.)

total of 360 days of instruction) were as well prepared for college study in the sciences as were the Chinese (with their 1,440 days).

The commission tells its "patient" it is terminally ill—without offering the specific nature of its malady. Is there a list of words children should be able to spell, but can't? Are there mathematical processes all children should master, but haven't? Are there grammatical constructions students should know, but don't? Are there scientific principles students should have mastered, but haven't? Specifically, in what subjects and in what ways do students need to learn more and better? For the hundreds of thousands of dollars spent on the commission study, one would expect at least *that* degree of specificity, instead of empty charges about mediocrity.

Children reflect the homes from which they come. If the homes are visited by violence, the children often are violent. If reading and the appreciation of literature are present, the children will tend to reflect that. If children are shown love and consideration, they will reflect those qualities.

Similarly, schools reflect the society that nurtures them. If schools are mediocre, it is because the society they serve is mediocre. But I don't happen to believe American society is mediocre. In fact, our

success as a society is largely the result of our public schools.

Can we improve our schools? Absolutely.

But the way to do it is not with universal criticisms and solutions. The way to improve is to examine and state the specific knowledge, skills, and attitudes our students need and don't have. Then, we should cite examples of excellence in this country's schools and in other countries' schools that might lead to improved standards.

Upon reflection, it's clear: The commission on excellence has failed in its mission. It has not promoted excellence. Alas, its report is mediocre. □

NSBA views

(Continued from page 58.)

same time, continuing NSBA's commitment to equal educational opportunity, access, and equity for all children, including those in vocational, career, and special education.

- Requesting that the NSBA Conference of School Board Association Communicators (COSBAC) develop a specific, positive, and practical action plan for NSBA to meet the challenge posed by the national reports, for consideration by the NSBA Board of Directors.

- Reaffirming NSBA's policy on the federal role in education, as approved by its Delegate Assembly.

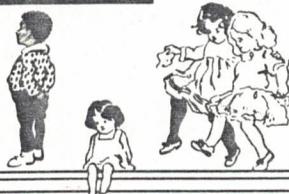
- Reviewing the relationship between elementary/secondary education and higher education to improve articulation and foster a team concept between those who provide teacher education and the school boards that employ teachers.

- Urging school board members nationwide actively to seek opportunities to speak at meetings of service clubs and industry/business/labor organizations in the local community as advocates for public education and for adequate public school funding.

- Maintaining a close liaison with the State Associations, including the State Association Executive Directors' NSBA Liaison Committee.

NSBA believes that our country's 95,000 local school board members are the natural leaders to cause reformation and renewal of the instructional programs of the public elementary and secondary schools in the nation's 16,000 local school districts. We are in the dusk of a new era for the public schools. But whether it precedes dawn or nightfall is up to the school board in each local community. □

journal after the fact



merit pay fails

Only you can kill merit pay for teachers

Contrary to the explicit wishes of classroom teachers and the public at large, the two giant teacher unions continue to resist the idea of merit pay. The unions can fight it, but only you effectively can kill it. Merit pay for teachers is an idea too tenacious to die of misguided resistance alone.

As demonstrated by a recent *Newsweek* poll of the general populace (in which 80 percent favored merit pay for teachers) and by our own survey of teachers themselves (see page 23), most anybody who thinks about merit pay likes the idea. Consequently, its virtual absence from the school field might seem to be a national mystery.

It isn't. Fact is, merit pay has been tried before in education—on and off since the turn of the century. Sometimes it's worked, but more often it hasn't. And insofar as we can tell, every time it's failed, a school board or school administration has been to blame.

By attempting to use merit pay plans as substitutes for management competence or by trying to advance merit evaluations as an excuse for social injustice, some school boards tarnished for decades a practice whose value should have been unassailable.

In the bad old days, some school boards employed merit pay plans as a backhanded method of dealing with incompetent teachers; they hid behind these plans to mete out retribution or cut budgets. Such boards must have hoped merit pay could offset the harm done by administrators who lacked the support or the mettle to confront management problems eye to eye. Some other boards even wrapped themselves in the mantle of merit pay when they wanted to perpetrate

in secret what they knew otherwise would be seen as blatant discrimination against women and blacks (and, yes, against teacher union activists, too). As a cover for nefarious doings, ~~then, merit pay historically has been a disaster.~~

And because such practices did occur in some places at some times, union suspicion about the current merit pay movement cannot be dismissed with a sneer. Union worries, to the extent they are themselves pure, must be acknowledged. We should try in good faith, even though our chances of answering all union objections seem bleak. Unions, after all, have a vested interest in opposing merit pay: Raises based even partly on individual performance would reduce the rank-and-file teacher's need to make salary demands collectively.

But honest attempts to implement merit pay can succeed in your school system. In fact, that is where they must succeed if our current method of teacher compensation is to improve. Merit pay in your school system ultimately will succeed only with the support and active participation of your own teachers.

Fortunately, the JOURNAL's representative sample of teacher opinion indicates a potential willingness on the part of classroom teachers to give merit pay one more go. Considering the lock-step way most teachers now receive raises, their responsiveness to the possibility of something better reflects a remarkable resilience.

Imagine being an effective, hardworking teacher condemned to receive exactly the same raise as the listless, barely adequate dolt down the hall. To anyone reared on tales of Henry Ford and Horatio Alger, this wrongheadedness is so glaring that merely seeing it officially sanc-

tioned must be grounds for despair. It's an authentic tribute to our teachers that so many go right on trying to excel.

That the obvious remedy for this wrongheadedness is greeted in some education circles with surprise and alarm is a significant clue about what's wrong with our schools. Plenty could be changed. But, here, we're merely proposing as a first key step that schools adopt a management practice that works passably well in nearly every other facet of the American endeavor.

Yes; of course, we know merit pay alone won't cure all that ails us. What it just might do, though, is send a message that's long overdue. By applying the merit pay principle to all school employees, you just might create an environment in which each staff member recognizes a personal vested interest in achievement. You just might signal the start of an era in which classroom excellence once again is rewarded, bringing to a close the time when a teacher's hard work and dedication, in effect, are penalized in relation to minimum performance.

Merit pay can work, but you must ensure that an employee's value is assessed without prejudice or favoritism. You must demand that administrators know what they want and why they want it—and have the skill to communicate it to subordinates and recognize it when they get it. These are not unreasonable demands to place on professional managers, provided you give them the autonomy to make fair judgments and the clout to make those judgments stick. In that case, holding management accountable for the performance of teachers will be one safeguard against widespread capriciousness in the assessment of merit: No true man-

ager survives for long with a demoralized staff.

The idea of merit pay for teachers is back. The unions can fight it. But only school board members and administra-

tors can destroy it once and for all—by tolerating ill-conceived, poorly managed, and unjust merit pay programs.

Unless you act, and demand that management acts, with unimpeachable hon-

esty and genuine wisdom, you are all but certain to squander—perhaps for our lifetimes—the broadest and deepest mandate ever enjoyed by an idea that could begin to transform our schools. □

As activists fight bilingual education . . .

Controversy has been the hallmark of bilingual education since its inception as a federal education program in 1968. Now, a group has formed that wants to put bilingual education out of business and enact a law proclaiming English the sole official language of the U.S.

Vocal critics charge that bilingual education—the practice of teaching limited-English-speaking youngsters the English language while simultaneously teaching other subjects in the students' native language—is being promulgated by separatists who want immigrants to resist accepting English as their primary language. Advocates of bilingual education blast such talk as manipulative and xenophobic; they say bilingual education is the only effective way to teach limited-En-

glish-speaking children to read, write, and speak English while continuing their normal education.

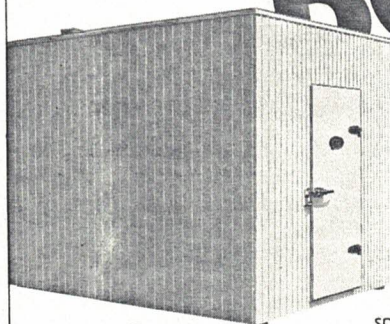
Given a new urgency by the waves of Hispanic immigration, the debate threatens to bring America's melting pot to a full boil. And, doing her best to stoke the fire is Gerda Bikales, president of U.S. English, a public-interest organization based in Washington, D.C. Bikales claims that the English language is in jeopardy. "It could slip away," she contends.

U.S. English's goal is to "recapture and defend English as the sole official language of the United States." Toward that end, the organization "directs its efforts to alerting the American people to the dangers of bilingualism." Since its formation in early 1983 as an outgrowth of

then-California Senator S.I. Hayakawa's 1981 proposal for a constitutional amendment designating English as the official language of the U.S., the group has spent considerable time trying to capture national media attention. Bikales—who learned four languages before arriving in the U.S. at the age of 16, when her family fled Nazi-occupied Europe—is troubled by the disruptive potential she says is engendered in bilingual education.

"We're not fanatics. We're not trying to redo society," says Bikales. "We recognize that as a nation, we've given up on the straight Anglo cultural model—and all to the good. But we nonetheless must maintain our common linguistic heritage." English, she asserts, is the one thing U.S. citizens have in common: "We

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THE AMERICAN SCHOOL BOARD JOURNAL

406 B/12

As we were saying (in 1908): Merit pay— when administered honestly—is effective and just

to a
higher
grade

Merit pay for teachers is not an idea invented last Tuesday by the excellence commission—or even President Reagan. The concept (and, periodically, the actual practice) has been around almost as long as the magazine you are holding in your hand.

Merit pay, and its incumbent complications, is an issue school boards and the JOURNAL have dealt with often. It is an idea whose time has come—and gone, and come again. As we told your board forebears 75 years ago: Merit pay, when accompanied by candid and courageous management, really is the only method of teacher compensation that is effective and just.

Here is what we had to say on that theme in a February 1908 article entitled *The Seattle method of classifying and paying teachers*:

"The problem of classifying and paying teachers has commanded the best thought of school boards and superintendents. It is always a vexed question, because nothing will arouse the attention of the average teacher so quickly as a discussion touching upon his or her compensation.

"One of the latest methods to be put into successful operation is the Seattle plan, which takes its name from the city in which it was first devised and [from] whence it has spread.

"The salary paid teachers is based upon the schedule according to the length and character of experience in school work.

... Teachers of minimum qualifications are assigned to the first [salary] grade. For merit, teachers with the requisite college education may be advanced by unanimous vote of the school board.

... "At any time, after one semester's work, any teacher whose work is especially meritorious may be advanced to the next [grade] by unanimous vote of the board of education.

"All teachers who are re-elected are advanced year by year until the maximum salary has been reached. Any teacher may be denied promotion, or may be reduced in class, upon recommendation of the superintendent, supported by reports of his supervisory assistants. For exceptional merit any re-elected teacher may be given a further advance in salary to an amount not in excess of the maximum."

In a January 1909 editorial on merit pay, we talked about teacher evaluation and why it does not always work:

"The Chicago 'merit pay system' under which the salaries of teachers are advanced is likely to receive a severe setback in the estimation of school administrators from revelations made last month. It would appear that the 'efficiency mark' of a teacher may depend upon the sole

opinion of either a principal or superintendent. With the absolute secrecy which surrounds the operation of the plan, a perfectly satisfactory teacher may lose her right for advanced pay even though her principal and district superintendent may agree individually that she deserves it.

"The Chicago merit plan lacks unity. There appears to be no cooperation between the [people who] supervise the teachers and [those who] rate their work. Again, the teacher is given no information as to the estimate which is placed upon her, except a notice that she is efficient or deficient—and that long after the end of the school year. She is not told where she is weak, or where she should strive to improve.

"The Chicago merit system needs revision by which district superintendents and principals will cooperate, and the teacher will be told where she is defective, where she must improve. The competitive idea must not be removed."

In spite of such difficulties of implementation, this editorial from the December 1908 issue of the JOURNAL sums our basic attitude on merit pay (sometimes, consistency has merit, too):

"The practicability of 'merit systems' for fixing and advancing the salaries of teachers is proven anew in every city where it has been thoroughly tried out. Thus, Superintendent Stratton D. Brooks writes enthusiastically of the plan, which has been in operation in the Boston schools since the advent of the small board of education. He is confident that the system brings into the schools the best talent available and makes for its steady development. . . .

"No large city in the country, with the possible exception of Pittsburgh, is without a merit system of some kind for advancing the salaries and the rank of teachers. The plan is opposed by a few obstructionists, who believe that the 'clock' should do the work necessary for boosting their annual stipends.

"School board members readily understand the value of a merit system. It is employed universally in the business world and is the only just plan." □



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CABINET AFFAIRS STAFFING MEMORANDUM

DATE: May 25, 1983 NUMBER: 073360CA DUE BY: 4:30 pm today
SUBJECT: National Education Association: Merit Pay

	ACTION	FYI		ACTION	FYI
ALL CABINET MEMBERS	<input type="checkbox"/>	<input type="checkbox"/>	Baker	<input type="checkbox"/>	<input type="checkbox"/>
Vice President	<input type="checkbox"/>	<input type="checkbox"/>	Deaver	<input checked="" type="checkbox"/>	<input type="checkbox"/>
State	<input type="checkbox"/>	<input type="checkbox"/>	Clark	<input type="checkbox"/>	<input type="checkbox"/>
Treasury	<input type="checkbox"/>	<input type="checkbox"/>	Darman (For WH Staffing)	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Defense	<input type="checkbox"/>	<input type="checkbox"/>	Harper	<input type="checkbox"/>	<input type="checkbox"/>
Attorney General	<input type="checkbox"/>	<input type="checkbox"/>	Jenkins	<input type="checkbox"/>	<input type="checkbox"/>
Interior	<input type="checkbox"/>	<input type="checkbox"/>		<input type="checkbox"/>	<input type="checkbox"/>
Agriculture	<input type="checkbox"/>	<input type="checkbox"/>		<input type="checkbox"/>	<input type="checkbox"/>
Commerce	<input type="checkbox"/>	<input type="checkbox"/>		<input type="checkbox"/>	<input type="checkbox"/>
Labor	<input type="checkbox"/>	<input type="checkbox"/>		<input type="checkbox"/>	<input type="checkbox"/>
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CEA	<input type="checkbox"/>	<input type="checkbox"/>	CCCT/Gunn	<input type="checkbox"/>	<input type="checkbox"/>
CEQ	<input type="checkbox"/>	<input type="checkbox"/>	CCEA/Porter	<input type="checkbox"/>	<input type="checkbox"/>
OSTP	<input type="checkbox"/>	<input type="checkbox"/>	CCFA/Boggs	<input type="checkbox"/>	<input type="checkbox"/>
	<input type="checkbox"/>	<input type="checkbox"/>	CCHR/Carleson	<input type="checkbox"/>	<input type="checkbox"/>
	<input type="checkbox"/>	<input type="checkbox"/>	CCLP/Uhlmann	<input type="checkbox"/>	<input type="checkbox"/>
	<input type="checkbox"/>	<input type="checkbox"/>	CCMA/Bledsoe	<input type="checkbox"/>	<input type="checkbox"/>
	<input type="checkbox"/>	<input type="checkbox"/>	CCNRE/Boggs	<input type="checkbox"/>	<input type="checkbox"/>

REMARKS:

It was suggested that the President should reply to the NEA statement on merit pay for teachers. The attached was drafted by Secretary Bell of Education. Please provide any comments you may have by 4:30 pm today.

Thanks.

RETURN TO:

☒ Craig L. Fuller
Assistant to the President
for Cabinet Affairs
456-2823

☐ Becky Norton Dunlop
Director, Office of
Cabinet Affairs
456-2800



UNITED STATES DEPARTMENT OF EDUCATION
THE SECRETARY

May 25, 1983

The Honorable Craig L. Fuller
Assistant to the President
for Cabinet Administration
The White House
Washington, D.C.

Dear Craig:

Attached is my draft of a letter from the President to Willard McGuire, President of NEA.

You will note that it is quite long. But it makes a number of key points that I feel should be made on behalf of our outstanding teachers and the nation's elementary and secondary school students. Please note that I tie the President's remarks at Seton Hall University to the National Commission on Excellence recommendations. Then, I try to subtly ask NEA why they are opposed to recognizing and helping our outstanding teachers.

I hope this is helpful.

Sincerely,

T. H. Bell

Attachment

*P.S. big chance of a big
release to the press?
This would make
headlines!*

May 25, 1983

DRAFT

Mr. Willard H. McGuire
President
National Education Association
1201 16th Street, N.W.
Washington, D.C. 20036

Dear Mr. McGuire:

The report of the National Commission on Excellence in Education makes seven very significant recommendations (see pages 30 and 31). The first two recommendations are, in my view, the key elements essential to correcting the alarmingly deficient performance of our schools. Following are direct quotes from these first two recommendations:

1. Persons preparing to teach should be required to meet high educational standards, to demonstrate an aptitude for teaching, and to demonstrate competence in an academic discipline. Colleges and universities offering teacher preparation programs should be judged by how well their graduates meet these criteria.
2. Salaries for the teaching profession should be increased and should be professionally competitive, market-sensitive, and performance-based. Salary, promotion, tenure, and retention decisions should be tied to an effective evaluation system that includes peer review so that superior teachers can be rewarded, average ones encouraged, and poor ones either improved or terminated.

I was surprised to read in the press that the NEA considered my remarks calling for teachers to receive pay based on merit rather than seniority and numbers of college credits earned as a "disgraceful assault on the teaching profession." My intent was to support the recommendations of the Commission and to raise my voice on behalf of the thousands of outstanding teachers whose compensation is being held down by the NEA-dominated pay scales that refuse to recognize and reward many distinguished teachers who are currently not being paid at a level commensurate with their worth.

If you will read the recommendations of the Commission you will note in recommendations four and seven on page 31 of the Commission report that this panel of distinguished educators, scientists, and scholars use the term Master Teacher to identify those individuals particularly deserving of recognition, rewards, and additional responsibilities in an education system that urgently needs reform and renewal. As you know, Secretary Bell has been preaching for adoption of this Master Teacher concept for over two years. This Administration is concerned about our teachers and we want to be helpful in attaining some badly needed reforms.

I agree with the Commission's recommendations and, in my commencement address at Seton Hall University, I wanted to make it clear that I favored the use of an effective evaluation system to guide decisions made in the retention, promotion, and tenure of teachers. I also agree with the Commission that teachers should have a voice in these decisions through a peer review system that includes teacher participation.

I cannot understand how the NEA concluded that these remarks, intended to constructively support the Commission's recommendations concerning how we can improve the teaching profession, were an assault on teachers. In my view, the teaching profession has suffered for years from this lack of recognition and reward of our most talented teachers. I would think that the NEA would join me in this endeavor rather than strike out with criticism of perhaps the most important far-reaching recommendations of the entire report of the Commission.

I was heartened to learn that Tennessee Governor Lamar Alexander had proposed to his State legislature a Master Teacher salary scale that would recognize and reward outstanding teachers. And I was disappointed to learn that this proposal was not enacted largely because of vigorous opposition of the NEA and its State affiliate, the Tennessee Education Association. The Secretary of Education, Terrel Bell, has been working with governors, State legislators, school boards, school administrators, and teachers on the Master Teacher concept and we all felt that the Tennessee plan was a great first step.

My Administration is deeply concerned about the condition of the teaching profession. We are not attracting nor holding sufficient numbers of bright and talented citizens into the teaching profession. Until we can persuade the NEA to support the badly needed reforms in salary, promotion, and tenure policies, I see little hope for the improvements we so desperately need.

The purpose of this letter is to try to persuade the NEA to change its position on merit pay scales for teachers. I fear that your organization's long-standing opposition to new ideas such as the Tennessee Master Teacher proposal has been the biggest obstacle to paying our outstanding teachers what they so richly deserve.

Is there any chance of persuading the NEA to help the nation's most distinguished teachers? This is the key to improved learning opportunities for the nation's school children. And this was the intent of my remarks. We have an unprecedented opportunity to make great strides in education now that this panel of distinguished citizens has made such an outstanding report to the American people. Let's all join together and

DRAFT

improve teaching and learning in America. I agree with the Commission: Our nation is, indeed, at risk because of the poor performance of our schools. So, I am asking you on behalf of the nation's 45 million elementary and secondary school children to pitch in and help by taking this first crucial step to improve the teaching profession. Until we do this, how can we accomplish the other reforms called for in the report? Of all the organizations in the nation I would think that the NEA would be a leader rather than a detractor from this long past due reform.

Sincerely,

25 MAY 1983

W.P.

NEA Assails Reagan on Merit Pay Idea

Associated Press

The nation's largest teachers' union yesterday accused President Reagan of making a "disgraceful assault" on the teaching profession with his call for pay based on merit instead of seniority.

Mary Hatwood Futrell, the National Education Association's secretary-treasurer, sharply criticized Reagan's reaction to the National Commission on Excellence in Education's call for changes in the nation's schools.

She told a House Education and Labor subcommittee it will cost billions of dollars to make the suggested improvements in the nation's schools, including higher pay for teachers.

Reagan said in a college commencement address Saturday that "we just haven't been getting our money's worth" from the schools. He said teachers "should be paid and promoted on the basis of their merit," and he criticized their unions for opposing merit pay plans.

Futrell, who is running unopposed to succeed Willard McGuire as the president of the 1.6 mil-

lion-member union at its convention in Philadelphia in July, said, "It is shocking and sad that a president makes absurd responses to a serious and thoughtful national report."

She charged Reagan with pushing "platitudes, prayers and private schools instead of focusing on the real needs of American public education."

Education Secretary T.H. Bell, in an interview with the Associated Press, said over the weekend that he feels the large majority of the nation's 2.2 million elementary and secondary school teachers are underpaid.

But Bell said he opposes spending any more money on the schools until the unions agree to tie salaries to merit and until school boards raise graduation standards.

But Futrell attacked the idea, saying, "I can remember when men were paid more than women. I can remember when whites were paid more than blacks and I can remember when high school teachers were paid more than elementary teachers."

THOMAS PATRICK MELADY
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June 20, 1983

Educational
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791

PERSONAL

MEMORANDUM

To: Mr. James A. Baker, III
Chief of Staff
Assistant to the President
The White House
Washington, D.C. 20500

From: Thomas Patrick Melady *TM*

Subject: Merit Pay and Master Teacher Initiatives (No. 86)

1. The merit pay and master teacher proposals of the President and the Secretary of Education have given us a definite lead in the growing national debate.
2. This is an initiative of this administration, and we want to be sure that the several Democratic candidates do not convert it to their initiative.
3. Mainstream America, now aware of the NEA position, is turning against the socialist doctrine of the "same for all--regardless of merit." The President, the Secretary and their principal aides should continue the campaign for merit pay and master teachers insisting that it is a local and state responsibility. We do not have and do not want national teachers.
4. This is a winning issue for us, and we want to hold on to the football.

Note

A direct appeal can be made to the school children: Do they believe it is right that their very, very good teacher gets the same pay as their very, very poor teacher.

cc: Mr. Michael Deaver
Mr. Edwin Meese
Mr. Michael McManus