

**STATUS REPORT  
ON THE  
IMPLEMENTATION OF JOB SHARING  
IN THE DEPARTMENT OF EDUCATION**

**A Report to the Legislature of the State of Hawaii**

**Submitted by the  
Legislative Auditor of the State of Hawaii**

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## TABLE OF CONTENTS

	<i>Page</i>
I. Introduction .....	1
II. Act 150 Provisions and Implementation Status .....	1
III. Implementation Issues and Timetable .....	13

## LIST OF TABLES

Table 1	Distribution of Job Sharing Participants by District and School .....	5
Table 2	Distribution of Job Sharing Participants by Grade Level .....	6
Table 3	Distribution of Job Sharing Participants by Subject Areas in Secondary Schools .....	6
Table 4	Distribution of Job Sharing Participants by Age .....	7
Table 5	Distribution of Job Sharing Tenured Teachers by Length of Service in DOE .....	7
Table 6	Distribution of Job Sharing Participants by Ethnic Background .....	8
Table 7	Division of Teaching Duties Between Job Sharers .....	9

## FOREWORD

In the 1978 regular session, the legislature enacted Act 150 to establish a three-year job-sharing pilot project. The department of education was selected as the agency for the project because of the large number of unemployed teachers in the State.

Our office was designated by Act 150 to monitor and evaluate the pilot project and to submit status reports. The act specifies that the project be evaluated against job-related factors such as turnover rates, absenteeism, morale, and productivity, and demographic factors such as ethnic, sex, and age composition of participants.

Because initial implementation of the pilot project took place only recently in January of this year, this report is primarily descriptive rather than evaluative. However, there are several issues which we have summarized in the report which the department of education and the legislature may wish to consider as the pilot project proceeds toward fuller implementation.

Act 150 requires our office to submit two additional reports in 1980 and 1981. We expect those reports to focus on evaluating the pilot project.

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## I. INTRODUCTION

Job sharing is generally defined as the filling of a permanent full-time job by two or more persons on a regular basis. Act 150, Session Laws of Hawaii 1978, established a three-year pilot project to test the feasibility of job sharing among classroom teachers in the department of education (DOE).

The legislative auditor was directed by Act 150 to monitor and report on the status of the project. The purpose of this report is to

- (1) inform the legislature on implementation progress and
- (2) identify potential problems and issues.

This report is presented in three sections. Section I consists of this introduction. Section II reviews the progress made thus far in implementing the act and, as required by the act, reports on various demographic characteristics of the participants. Section III identifies some potential problem areas and issues and describes the next steps in project implementation.

## II. ACT 150 PROVISIONS AND IMPLEMENTATION STATUS

Legislative interest in job sharing which had been evidenced for several sessions culminated in the enactment of Act 150 in the 1978 regular session. According to Section 3(5) of the act, job sharing in DOE is “the voluntary sharing of a full-time permanent employee’s position with another employee, with each working one-half of the total number of hours of work required per week, and with each receiving half of the salary to which each is respectively entitled and at least half of each employee benefits afforded to full-time employees.”

This section describes the major provisions of Act 150 and reports on the implementation status of each.

## Planning and Preparation

**Act 150 provisions.** The legislature was concerned that DOE undertake a careful planning and preparation phase before implementing the pilot project. Act 150 reflects this concern by permitting DOE to implement the project only to the extent practicable during the first year.

**Implementation status.** DOE spent the summer and fall of 1978 in planning and preparation. The major product of this development effort is a handbook distributed to teachers and administrators in October 1978.<sup>1</sup> The guidelines describe the following: criteria for selecting participants, procedures for tenured teacher applicants, tentative project timetable, administrative controls, and benefits to be granted to each job sharer. Included in the guidelines are samples of the forms to be used.

On November 13, 1978, DOE posted its recruitment notice to tenured classroom teachers for the limited implementation of the pilot project for the second semester of the current school year. Twenty-four teachers responded. Four withdrew prior to implementation. Bargaining unit officials indicated that: (1) they were somewhat surprised that there were even this many, since many teachers are reluctant to change their plans in the middle of the school year; (2) perhaps more would have applied if more lead time had been provided; and (3) any new project which affects working conditions, even those initiated by the unit itself, takes some time to attract participants.

In recruiting new hires for each position, DOE seems not to have had a serious problem in finding people interested in job sharing. While there were a few slots left two weeks before implementation, none of the tenured teachers' applications had to be withdrawn due to difficulty in finding an appropriate new hire.

## Application Procedures

**Act 150 provisions.** Participation in job sharing is strictly voluntary. Application is at the initiative of the tenured teacher with the concurrence of the immediate supervisor, appropriate personnel officers, and the superintendent. Upon selection of the tenured teacher, the position is converted for the duration of participation into two job-sharing positions.

**Implementation status.** The guidelines provide for step-by-step procedures to be followed by project applicants. A tenured teacher interested in job sharing must first indicate that interest. The principal then determines whether the teacher is eligible. If eligible, the teacher then submits a plan for sharing teaching time, duty-free time, and related educational responsibilities. The principal's approval of the sharing plan sets into motion the department's procedures to keep the project size within school, district, and state quotas.

<sup>1</sup>Department of Education, *The State of Hawaii Department of Education Job Sharing Pilot Project*, September 1978 (hereafter referred to as "project guidelines").

The next step is to find a new hire who is a suitable match. This involves surveying the new hire applicants for their interest in job sharing and the selection of at least ten new hire applicants for each job-sharing position. The office of personnel services forwards these names to the principal. Final selection is the principal's decision, but principals have been advised to consult with the incumbent tenured teacher on the proposed selection.

## Participation

**Act 150 provisions.** Project participation is limited to 100 full-time, tenured classroom teachers. No more than 5 percent of the eligible faculty at the school may participate. No minimum number is required before the project can proceed. Those counterpart teachers filling the newly created job-sharing positions must possess the minimum qualifications of the positions which have been converted to job sharing.

### Implementation status

*Participation criteria.* The guidelines set forth two kinds of criteria for participation: (1) criteria for determining which tenured teachers may participate and (2) criteria for selecting participants in the event there are more applicants than project slots.

With regard to (1), the guidelines provide for the following:

- “1. The teacher is tenured and is functioning as a classroom teacher.
2. The position is an unobligated permanent position.
3. The position will continue to be used in the school and will not be reconstituted (given new teaching lines with different teacher certification requirements).
4. The tenured employee is sufficiently senior and assured immunity from staff reduction.
5. The proposed job sharing will not cause an undue hardship or problem for the school.”<sup>2</sup>

The second set of criteria applies to the selection of participants if there are more applicants at a given school than 5 percent of the eligible classroom faculty or if there are more than 100 applicants statewide. If there are too many applicants at the school level, the first criterion is the teaching areas with the highest number of unemployed teachers: elementary education, social studies, physical education, foreign languages, and English.

<sup>2</sup>Project Guidelines, p. 3.

The second criterion is service time in DOE as a teacher; third, continuous service time in the school; and, fourth, continuous service time within the district. In addition, the guidelines provide that, in selecting participants for the 1979–80 and 1980–81 school years, first preference will be given to those who have participated in the previous year.

In the event there are more than 100 applicants statewide, the guidelines provide for district quotas to be calculated in proportion to the student enrollment in each district. Those districts with more applicants than their quotas allow will use the same criteria as apply to excess applicants at the school level. If a district does not fill its quota, the office of personnel services may transfer the unused slots to other districts on the basis of student enrollment.

For the current semester there was no need to invoke either sets of criteria. In no case were there more applicants than 5 percent of a faculty nor were there more than 100 applicants statewide.

*Geographic distribution.* All seven administrative districts are represented in the first group of 20 pairs of job sharers. Table 1 displays the distribution by district and school.

*Grade level distribution.* Twelve job-sharing positions, or 60 percent of the positions, are at the elementary level and eight positions, or 40 percent, are at the high school level. As shown in Table 2, there are no participants in the intermediate grades. It is too early in the project and the sample is too small to find explanations for the lack of intermediate school participants. Also, there are no participants in the sixth grade except that the one upper elementary and the two Title I reading teachers have sixth graders among the students in their classes.

*Subject area distribution.* Of the 12 elementary positions, two are Title I reading positions. The one upper elementary position specializes in science, physical education, and math. The other nine elementary positions are assigned to specific grades, and almost all are self-contained classrooms in which the teacher handles all subjects. At the secondary level the distribution of subject areas is shown in Table 3.

*Distribution by sex.* Of the 20 tenured teachers, 19 are female and one is male. Their counterparts are 18 females and two males.

*Distribution by age.* Of the current participants, the ages of both groups of sharers fell into definite patterns, as shown in Table 4. The tenured teachers are heavily grouped in the 30–39-year-old bracket, with a smaller number in the 40–49-year-old bracket and none in the 20–29-year-old bracket. In contrast, almost half of the new hires are in the 20–29-year-old bracket and a little more than half are in the 30–39-year-old bracket.

There are no tenured teachers in the 60+ bracket, and only two in the 50–59-year-old bracket. It was thought at the time the act was passed that job sharing would afford those teachers close to retirement an opportunity to ease into retirement. According to bargaining unit representatives, however, job sharing would entail too much of a financial sacrifice for most near-retirees.

**Table 1**  
**Distribution of Job Sharing Participants**  
**By District and School**

	<i>School total</i>	<i>District total</i>
<i>Honolulu District</i> . . . . .		3
Fern Elementary . . . . .	1	
Kaiser High . . . . .	1	
Kapalama Elementary . . . . .	1	
<i>Central District</i> . . . . .		6
Aiea High . . . . .	1	
Hickam Elementary . . . . .	1	
Pearl Harbor Elementary . . . . .	1	
Radford High . . . . .	3	
<i>Leeward District</i> . . . . .		1
Pohakea Elementary . . . . .	1	
<i>Windward District</i> . . . . .		3
Ahuimanu Elementary . . . . .	1	
Kalaheo High . . . . .	1	
Special secondary class lodged at Kaneohe Elementary . . . . .	1	
<i>Hawaii District</i> . . . . .		2
Kealakehe Elementary . . . . .	2	
<i>Maui District</i> . . . . .		3
Baldwin High . . . . .	1	
Kahului Elementary . . . . .	1	
Lanai High and Elementary . . . . .	1	
<i>Kauai District</i> . . . . .		2
Kapaa Elementary . . . . .	1	
Waimea Canyon Elementary . . . . .	1	

**Table 2**

**Distribution of Job Sharing Participants  
By Grade Level**

	<i>Number of participants</i>
Elementary .....	12
Kindergarten .....	2
Grade 1 .....	1
Grade 2 .....	2
Grade 3 .....	1
Grade 4 .....	1
Grade 5 .....	2
Grade 6 .....	0
Upper elementary .....	1
All grades (Title I reading) .....	2
Intermediate .....	0
High school .....	8

**Table 3**

**Distribution of Job Sharing Participants  
By Subject Areas in Secondary Schools**

	<i>Number of positions</i>
Math .....	1
German/World History .....	1
U.S. History/Hawaiian History .....	1
English .....	2
English/Social Studies .....	1
Physical Education .....	1
English, Personal Development, Science, Arts and Crafts, Math .....	1

**Table 4**

**Distribution of Job Sharing Participants  
By Age**

<i>Age groups</i>	<i>Tenured teachers</i>	<i>New hires</i>
20 – 29 .....	0 .....	9
30 – 39 .....	12 .....	11
40 – 49 .....	6 .....	0
50 – 59 .....	2 .....	0
60+ .....	0 .....	0

*Distribution by length of service of tenured teachers.* Table 5 shows the number of years of DOE employment of the tenured teachers. As in their age distribution, there was concentration in two groups of years, 6–10 years and 11–15 years of service. There were no tenured teachers with less than five years of service, nor were there any in the 16–20 or 26–30 service years.

**Table 5**

**Distribution of Job Sharing Tenured Teachers  
By Length of Service in DOE**

<i>Number of years</i>	<i>Number of participants</i>
0 – 5 .....	0
6 – 10 .....	11
11 – 15 .....	8
16 – 20 .....	0
21 – 25 .....	1
26 – 30 .....	0

*Distribution by ethnic background.* DOE is required to record the ethnic background of all applicants for employment. Table 6 displays the ethnic distribution of both the tenured teachers and the new hires.

**Table 26**

**Distribution of Job Sharing Participants  
By Ethnic Background**

<i>Ethnic groups</i>	<i>Tenured teachers</i>	<i>New hires</i>
Chinese .....	2 .....	1
Japanese .....	10 .....	11
Korean .....	1 .....	0
Part-Hawaiian .....	1 .....	0
White .....	6 .....	8

**Manner in Which the Job Is Shared**

**Act 150 provisions.** Other than the general guideline that each job sharer would work one-half of the total number of hours required per week of the full-time position, Act 150 does not specify how the job is to be shared. Thus, the department has some flexibility in determining how the job and related responsibilities are to be shared by the two teachers.

**Implementation status.** Tenured teacher applicants were asked to list their then current teaching schedule and offer a proposed division of teaching, duty-free time, and related educational responsibilities. Although some adjustments in schedules may have occurred since implementation began, the description here is based on the schedules as originally submitted.

**Teaching duties.** The division of the full-time teaching schedule tends to fall into two categories: (1) those where both job sharers work five days a week, splitting the time the same way every day or with slight variations; and (2) those where each participant teaches full days but less than five days per week.

The preponderance is in the first category, as seen in Table 7. Sixteen of the 20 tenured teachers proposed the five-days-a-week schedule, generally splitting the time by a half day apiece. At the elementary level, nine of the positions are split in this manner, with four of

those nine providing for no overlap in the two job sharers' schedules, while the other five allow for anywhere from 15 to 30 minutes' overlap.

At the secondary level, five of the positions are split on a half-day basis, three with overlaps, two without. In addition, there are two variations. In one, the tenured teacher has split her half schedule, teaching one period in the morning and two in the afternoon, with the new hire teaching the middle two periods. In the other variation, the tenured teacher works the morning half for two days and the afternoon half for three days each week, with the new hire teaching the opposite blocks of time.

The other four tenured teachers proposed to divide their position by teaching full days for less than five days a week. Two teachers proposed that each job sharer teach two and one-half days apiece each week. Another teacher, because of the existing schedule at her high school, proposed to teach two full days one week, three days the next week, alternating the days between the two participants. The fourth teacher in this category proposed to teach full days on Thursdays and Fridays, with the new hire teaching Mondays and Tuesdays, and Wednesdays being alternated between them.

Table 27

Division of Teaching Duties Between Job Sharers

<i>Schedules</i>	<i>Elementary</i>	<i>Secondary</i>
<i>Five Days Per Week</i>		
Tenured teacher in a.m.; new hire in p.m.; no overlap . . . . .	3	2
Tenured teacher in a.m.; new hire in p.m.; with overlap . . . . .	5	3
Tenured teacher in both a.m. and p.m.; new hire in between . . . . .		1
Tenured teacher in p.m.; new hire in a.m.; no overlap . . . . .	1	
Tenured teacher in a.m. two days per week and p.m. three days; new hire in reverse . . . . .	1	
<i>Less Than Five Days Per Week</i>		
Each teacher teaches two full days one week; three days the next . . . . .		1
Each teacher teaches two and one-half days per week . . . . .	1	1
Tenured teacher on Thursday and Friday, new hire on Monday and Tuesday, alternate Wednesday . . . . .	1	

*Duty-free lunch and preparation periods.* The full-time workday of DOE teachers includes two blocks of nonduty time each day: a 30-minute lunch period and a 40-minute preparation period. The project guidelines provide that the tenured teacher shall be assured of at least half of each of these nonduty periods; i.e., at least 15 minutes of duty-free lunch time and 20 minutes of preparation time. It was left up to the tenured teacher to propose how the other halves of these two periods should be scheduled for the new hire.

The majority of the tenured teachers have provided for the incumbent and the new hire to each have full lunch and preparation periods. A minority have divided the two periods in half and another minority have not provided for duty-free lunchtime for the new hire. In most cases the granting or denial of the duty-free time to the new hire appears to be dictated by the existing classroom or school schedule.

*Grading.* At the secondary level, since the participants will teach their own classes, grading will simply be done by each for his or her respective students. At the elementary level, the division of time has largely been made according to various subject areas. The tenured teachers have proposed that each participant grade the subjects each handles even though the same group of students would be involved. Where both job sharers are involved in all subjects, grading will be done jointly.

*Parent-teacher conferences.* As with grading, the assignment of responsibilities for parent-teacher conferences at the secondary level poses no problem—each teacher confers with the parents of the students in his or her respective classes. At the elementary level, two-thirds of the tenured teachers proposed that both job sharers confer jointly with the parents. In the other one-third, conferring will be done by the teacher handling the subject matter that the parent wants to see the teachers about.

*Extracurricular activities.* Extracurricular activities at the elementary level are minimal and most of the tenured teachers proposed that whatever there is be shared. Two elementary teachers indicated that they would continue to carry on with no division of the assignments they already had. At the secondary level, of those tenured teachers with extracurricular responsibilities, a few designated which activities they would retain and which the job sharer would assume, but more generally the teachers planned to share the responsibilities.

*Campus supervision and lesson plans.* When the campus supervision assignment falls into a given time slot, the teacher on duty at the time will handle it. Where each participant teaches specific courses or subject areas, each person is responsible for those lesson plans. Where the job sharers are involved in all subjects, they will share responsibility for the lesson plans. One exception was one tenured secondary English teacher who will continue to do all plans.

*Faculty meetings and committee assignments.* Almost all tenured teachers have provided that whoever is on duty in the afternoon will attend faculty meetings. The exception is one tenured teacher who is on duty in the mornings but plans to attend the afternoon faculty meetings. All have provided for the one who attends the meetings to keep the other job sharer informed.

A number of the tenured participants did not have committee assignments. Where they did, however, the majority expected to retain the particular assignments they already had. As new responsibilities arise, the tenured teachers generally intend that they be shared.

### **Manner in Which Benefits and Compensation Are Shared**

**Act 150 provisions.** Each job sharer is to be compensated at one-half of the salary to which the participant would ordinarily be entitled according to the participant's classification and experience. Benefits which can be divided evenly shall be so divided, but where the benefits cannot be divided, a full share of the benefits shall be given to each job sharer.

**Implementation status.** DOE's interpretation of the compensation and benefits to be provided to each job sharer is displayed in Exhibit 1. The compensation and benefits were developed in consultation with the bargaining unit.

Exhibit 1

Employee Benefits and Terms, Job Sharing Pilot Project<sup>1</sup>

<i>Employee benefits and terms</i>	<i>In-service tenured teacher</i>	<i>New hire teacher</i>
Compensation	One-half of salary appropriate to placement in salary schedule.	Same.
Sick leave	18 half days.	Same.
Vacation	Same as full-time; pay will be at one-half rate.	Same.
Retirement system	Membership is mandatory for those employed at least three months. Retirement service is accumulated at one-half rate.	Same.
Health fund benefits <ul style="list-style-type: none"> <li>. Medical plan</li> <li>. Dental plan</li> <li>. Group life insurance</li> </ul>	Same as for full-time teachers.	Same.
Service credit	Service credit for salary increment, longevity step credit, time in class, sabbatical eligibility, seniority in school and seniority in department is same as for full-time teachers.	Same if service for entire school year.
Service award	Same as for full-time teachers—one month's credit for every month of service.	Same.
Long-term leave	Same as for full-time teachers.	Same.
Short-term leave	One half of ordinary leave time; i.e., one half day of funeral leave, two half days of personal leave.	Same.
Tenure rights	Retain full tenure rights.	Temporary teachers; no probation credit or tenure status.
Collective bargaining membership	Retain full membership in Bargaining Unit 5.	Not members of Bargaining Unit 5.
Substitutes	May be hired on half time basis; may work for partner as substitute.	Same.
Length of job sharing contract	One full academic year except for first year when contract will be for one semester. At end of each contract year, job sharers will have option to renew contract or return to full-time position. Teachers accepting job sharing cannot convert back to full-time during contract duration unless such conversion is necessary to terminate an unsuccessful job sharing arrangement.	Same, except do not have option to renew contract. Contract may be terminated without a hearing at any time prior to contract expiration.

<sup>1</sup>Project Guidelines; DOE Regulation No. 5112.

A number of the tenured participants did not have committee assignments. Where they did, however, the majority expected to retain the particular assignments they already had. As new responsibilities arise, the tenured teachers generally intend that they be shared.

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**Act 150 provisions.** Each job sharer is to be compensated at one-half of the salary to which the participant would ordinarily be entitled according to the participant's classification and experience. Benefits which can be divided evenly shall be so divided, but where the benefits cannot be divided, a full share of the benefits shall be given to each job sharer.

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### III. IMPLEMENTATION ISSUES AND TIMETABLE

This section summarizes some potential problem areas and issues as they have emerged in the implementation of the pilot project and closes with a review of the timetable for the implementation of the project for the 1979–81 school years.

#### Problems and Issues

**Workload and compensation.** At the secondary level, where the full-time teaching position consists of five teaching periods per day, it has been very difficult to achieve a strict 50-50 division of teaching time. In most cases, the tenured teacher has retained three teaching periods. Some maintain that they in effect are working 60 percent of the time for 50 percent of the pay.

At the elementary level, by and large, the “heavier” subjects are scheduled in the morning. Most of the tenured elementary job sharers have opted to work in the morning. Thus, they, too, may well claim to bear a greater workload even if the time has been divided in half.

For the sake of the project, however, neither the teachers nor the bargaining unit officials are pressing the matter at this time. But as the project proceeds, it should be anticipated that unequal workload may be a disincentive for tenured teachers to participate. The issue is whether all teaching jobs can realistically be divided equally, and, if not, what the appropriate compensation ought to be.

**Substitutes.** Two problems have emerged: (1) assignment procedures and (2) compensation.

DOE policy is for all personnel interested in substituting to be placed on district lists. Substitutes ordinarily must be called from those lists on a rotating basis. Where the job sharers have expressed a willingness to substitute for each other, they too have had to get onto district lists. They are the first called, however, to substitute for their partners. Some did not expect to have to do this additional paperwork to substitute for each other.

A second, more serious problem concerns compensation when a job sharer substitutes for a counterpart. DOE and the bargaining unit differ over whether the pay of the tenured teacher should be at the established per diem rates for all substitutes or at the daily rate of the tenured teacher’s own salary. A grievance has been filed by a tenured teacher and is in the process of discussion. The issue, then, is the conflict between existing departmental policies and practices and interpretations of Act 150.

**Provision of half of the duty-free lunch and preparation periods.** The sharing of the nonduty lunch and preparation periods is a potential issue in this project. DOE accepts the

tenured teacher's entitlement to half of each of the two duty-free periods. However, the department maintains that the second halves of the duty-free lunch and preparation periods are not benefits which should accrue to the new hire. DOE holds that it is not obligated to include these in the new hire's work day. Rather, the department views these additional 35 minutes as time available to the principal to use for more student-teacher contact time if he so chooses.

The teachers' bargaining unit maintains that it now has no legal standing to insist that the new hires be guaranteed these 35 minutes each day because they are not members of the bargaining unit. For the present, the bargaining unit has settled for the department's assurance that the principals will try to be reasonable and fair but have no obligation to grant the time to the new hires. However, should job sharing become a permanent employment option in DOE, the fate of what would otherwise be the new hire's half of the duty-free lunch and preparation periods will have to be resolved.

**Limitation to classroom teachers.** Both DOE and bargaining unit officials have received inquiries from nonclassroom faculty as to whether there is any possibility of opening the project to such personnel as counselors and school librarians. Act 150 is quite clear in its language, however, that the pilot project is limited to classroom teachers. The issue is whether the legislature should consider the advantages and disadvantages of expanding the project to include other school personnel while the project is still being tested or whether such consideration should await evaluation of the project as originally conceived.

### **Project Timetable**

DOE has recently begun its project recruitment procedures for the 1979-80 school year. The department expects to adhere to the following schedule:

- March 1, 1979:      Announcement of project for 1979-80 school year
- April 30, 1979:    Application deadline
- May-June, 1979:   Selection of 100 participants effective September 1, 1979

The same schedule, projected for the following year, is expected to apply for the 1980-81 school year.