A Report of an Internship in the Bloomingdale, Michigan, Public Schools

James F. Scholley
Western Michigan University

Follow this and additional works at: https://scholarworks.wmich.edu/masters_theses
Part of the Educational Administration and Supervision Commons

Recommended Citation
https://scholarworks.wmich.edu/masters_theses/1932

This Masters Thesis-Open Access is brought to you for free and open access by the Graduate College at ScholarWorks at WMU. It has been accepted for inclusion in Master’s Theses by an authorized administrator of ScholarWorks at WMU. For more information, please contact maira.bundza@wmich.edu.
A REPORT OF AN INTERNSHIP IN THE
BLOOMINGDALE, MICHIGAN,
PUBLIC SCHOOLS

by

James F. Scholley

A Project Report
Submitted to the
Faculty of The Graduate College
in partial fulfillment of the
requirements for the
Degree of Specialist in Education
Department of Educational Leadership

Western Michigan University
Kalamazoo, Michigan
August 1980
A REPORT OF AN INTERNSHIP IN THE
BLOOMINGDALE, MICHIGAN,
PUBLIC SCHOOLS

James F. Scholley, Ed.S.
Western Michigan University, 1980

This paper describes internship experiences which occurred in
the central administration office of a public school district in
Michigan. The plan for the internship is contained in a prospectus
which has been included in the first chapter. A rationale for the
internship and for the selection of sites for the internship also can
be found in chapter I.

The second chapter is devoted to a description of experiences,
problems, and responsibilities that occurred during the internship
and included the following: central office personnel work, business
office functions, and a special assignment from the president of the
board of education. This assignment involved a revision of an ele­
mental school level hot lunch program.

Chapter III deals with comparisons of what was observed by the
intern with what could have been done as described in the literature
cconcerning school business management, educational planning, and
leadership.

The fourth chapter examines the internship experiences as they
relate to goals outlined in the prospectus. Objectives that were met
are cited as are those that were not accomplished.
ACKNOWLEDGMENTS

The internship itself and the many learning opportunities resulting from it have been extremely valuable to this intern's educational learning and development. The intern's advisor, Dr. Carol F. Sheffer, encouraged a critical analysis of the experiences and observations made during the internship and also encouraged independent thinking and decision making as tasks and projects were undertaken.

Dr. Donald Dragoo, superintendent of Bloomingdale Public Schools and site sponsor for the internship, made valuable and thoughtful suggestions during the 6 weeks of the internship. Mrs. E. Buckholz, the business manager for the district took precious time to explain the functions of her office and rendered assistance when it was needed while the intern completed assigned tasks.

The opportunity to learn by doing, a "hands-on" approach, has contributed positively to this intern's problem solving skills. Hopefully, many skills can be applied to present and future administrative problems as they are met during a career in educational leadership.

James F. Scholley
INFORMATION TO USERS

This was produced from a copy of a document sent to us for microfilming. While the most advanced technological means to photograph and reproduce this document have been used, the quality is heavily dependent upon the quality of the material submitted.

The following explanation of techniques is provided to help you understand markings or notations which may appear on this reproduction.

1. The sign or “target” for pages apparently lacking from the document photographed is “Missing Page(s)”. If it was possible to obtain the missing page(s) or section, they are spliced into the film along with adjacent pages. This may have necessitated cutting through an image and duplicating adjacent pages to assure you of complete continuity.

2. When an image on the film is obliterated with a round black mark it is an indication that the film inspector noticed either blurred copy because of movement during exposure, or duplicate copy. Unless we meant to delete copyrighted materials that should not have been filmed, you will find a good image of the page in the adjacent frame.

3. When a map, drawing or chart, etc., is part of the material being photographed the photographer has followed a definite method in “sectioning” the material. It is customary to begin filming at the upper left hand corner of a large sheet and to continue from left to right in equal sections with small overlaps. If necessary, sectioning is continued again—beginning below the first row and continuing on until complete.

4. For any illustrations that cannot be reproduced satisfactorily by xerography, photographic prints can be purchased at additional cost and tipped into your xerographic copy. Requests can be made to our Dissertations Customer Services Department.

5. Some pages in any document may have indistinct print. In all cases we have filmed the best available copy.

University 
Microfilms 
International
300 N. ZEEB ROAD, ANN ARBOR, MI 48106
18 BEDFORD ROW, LONDON WC1R 4EJ, ENGLAND

Reproduced with permission of the copyright owner. Further reproduction prohibited without permission.
SCHOLLEY, JAMES FRANKLIN
A REPORT OF AN INTERNSHIP IN THE
BLOOMINGDALE, MICHIGAN, PUBLIC SCHOOLS.

WESTERN MICHIGAN UNIVERSITY, ED.S., 1980
# TABLE OF CONTENTS

ACKNOWLEDGMENTS ........................................... ii

CHAPTER

I  INTRODUCTION ........................................... 1

Projected Nature of Internship Experiences ................. 4

II  A REPORT OF AN INTERNSHIP IN THE BLOOMINGDALE
SCHOOL DISTRICT .................................... 7

General Information .................................. 7

Business Management Experiences ....................... 7

Food Service Assignment from Board of
Education President .................................. 16

Central Office Experiences With the
Superintendent ....................................... 23

Summary ............................................. 28

III  LITERATURE AS RELATED TO PRACTICE .................. 29

Introduction ....................................... 29

Literature Review .................................. 29

IV  PROSPECTUS OBJECTIVES ACCOMPLISHED AND THOSE
NOT ACCOMPLISHED .................................... 46

V  CONCLUSIONS AND RECOMMENDATIONS ..................... 50

Conclusions ....................................... 50

Recommendations .................................. 51

APPENDICES ............................................. 53

A  Access to Student Record Forms ...................... 54

B  Food Service Committee Report ..................... 58

C  Special Programs' Budget Updates ..................... 63

BIBLIOGRAPHY .......................................... 68
CHAPTER I

INTRODUCTION

Any educator who intends to pursue a career in public school administration needs and certainly can benefit from the opportunity to gain work experience with a superintendent and a central office staff. The experience can be compared with the directed teaching program for students who intend to become classroom instructors. This internship provided an excellent learning opportunity to gain awareness and insight regarding the daily operation of a school district as well as the various program planning roles of the superintendent and the business manager.

The internship was completed in a public school district, located between South Haven and Kalamazoo, Michigan. The district selected was thought to be representative of many small districts in southwestern Michigan with respect to economic, cultural, and social characteristics. The district offered a K-12 academic program, participated in the County Intermediate School District's Skills and Learning Center programs and used the Intermediate District's supportive services such as: special education consultants, psychological testing, social worker services, and speech and hearing evaluation and therapy.

The student population of the K-12 district at the time of the internship was 1,480. The district's instructional program included three levels: an elementary with 598 students, a middle school with
375 students, and a high school with 507 students. Six administra-
tors comprised the management team consisting of one superintendent,
three building principals, a business manager, and a director of
buildings and grounds. The state equalized valuation for the dis-
trict was $22,920,249. The millage rate was 27.08, of which 19 were
extra voted mills.

The physical setting of the district was a rural one. Farms and
a few owner-operated businesses provided very limited employment
opportunities within the boundaries of the district. The majority of
heads of households had found employment in Allegan, Bangor, Kalama­
zoo, or South Haven, Michigan. An examination of school records
indicated that 80% of the district's parents did not continue their
education beyond the 12th grade. Thus the working force tended to be
made up of hourly paid blue collar workers. In some cases, both par-
ents worked to provide a living income for family needs. Data from
welfare reports indicated that up to 35% of nonworking resident
mothers had applied for and received public assistance in the form of
aid to dependent children and food stamps.

Professionals, those who had graduated from a university, and
who offered services such as medical, dental, social, educational, or
legal, were in a minority in the Bloomingdale School District. Fewer
than 10% of the teaching faculty resided within the district.

A management team concept was operating in the school district
at the time of the internship. Involvement in the operation of the
concept added to the educational and experiential benefits of the in-
tern as he pursued the Specialist Degree Program in the field of
educational leadership at Western Michigan University.

The last part of chapter I is devoted to the prospectus of the internship. The prospectus served as a general plan for organizing internship activities. It aided the on-site supervisor as well as the intern as activities were planned, undertaken, and evaluated.
# PROJECTED NATURE OF INTERNSHIP EXPERIENCES

## OBJECTIVES

**A. CONCEPTUAL**

1. To gain exposure to a district's central office setting and operations.
2. To acquire a better understanding of business management procedures and budget development.
3. To become aware of and better acquainted with completion of required budgeting forms from the State Department of Education due during the internship period.

## EXPERIENCES AND CONTACTS

- **The intern will:**

  1. Observe central office staff as they function and note the effect on school operations throughout the system.
  2. Examine steps involved in formulating school district budget line items by working with a business manager and business office staff.
  3. Read and examine the various reports and forms and relate their importance to the district's task of educating students.

## TERMINAL SKILLS

- **The intern will be able to:**

  1. Identify and describe experiences and observe problem solving techniques while in the central office.
  2. Describe budgeting techniques used while developing budget line items.
  3. To apply budget development skills by working with a Title I budget.
<table>
<thead>
<tr>
<th>OBJECTIVES</th>
<th>EXPERIENCES AND CONTACTS</th>
<th>TERMINAL SKILLS</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>B. HUMAN</strong></td>
<td><strong>The intern will:</strong></td>
<td><strong>The intern will be able to:</strong></td>
</tr>
<tr>
<td>1. To become familiar with Board of Education Policy as interpreted by the superintendent and note the effect of policy on district operation.</td>
<td>1. Observe board and management team efforts in policy development activities and their application.</td>
<td>1. Present a model situation in which a policy might need to be developed or modified.</td>
</tr>
<tr>
<td>2. To analyze the relationship between business manager, superintendent, and building principals during the process of budget development.</td>
<td>2. Interview building administrators, business manager, and superintendent and observe interaction between them as they pursue their job roles.</td>
<td>2. Recognize and describe relevant obstacles to as well as factors that facilitate effective working relationships.</td>
</tr>
<tr>
<td>OBJECTIVES</td>
<td>EXPERIENCES AND CONTACTS</td>
<td>TERMINAL SKILLS</td>
</tr>
<tr>
<td>------------</td>
<td>--------------------------</td>
<td>-----------------</td>
</tr>
<tr>
<td>C. TECHNICAL</td>
<td>The intern will:</td>
<td>The intern will be able to:</td>
</tr>
<tr>
<td>1. To develop increased skills in developing a school district budget in area of projections of utility costs.</td>
<td>1. Make appropriate contacts with local energy suppliers and use this data in budget development.</td>
<td>1. Make accurate budget estimates in utility area.</td>
</tr>
<tr>
<td>2. To be cognizant of various personnel records and purposes of establishing and maintaining these records.</td>
<td>2. Examine representative samples of central office records (personnel) and note their location in the central office.</td>
<td>2. Apply knowledge of records use by being able to retrieve information from records when required to do so.</td>
</tr>
<tr>
<td>3. To become familiar with new accounting procedures as they apply to school districts as mandated by the State Department of Education.</td>
<td>3. Review new state accounting manual. Discuss conversion from old system to new system with business manager.</td>
<td>3. Recognize and manipulate new state accounting procedures.</td>
</tr>
</tbody>
</table>
CHAPTER II

A REPORT OF AN INTERNSHIP IN THE BLOOMINGDALE SCHOOL DISTRICT

General Information

At the time of the internship, the central office of the district included the offices of: the superintendent, the business manager, and the director of buildings and grounds. Even though the office was located off the main school campus, it was readily accessible to administrators, teachers, and parents.

Dr. Donald Dragoo, the district superintendent, was the on-site supervisor of the internship. He delegated some of the supervisory functions of the internship to the district business manager. The intern's program was designed to provide exposure to and experience with business office functions, policy development, and personnel operations. An added facet of the internship was an assignment from the president of the board of education. The assigned project involved an evaluation of the existing hot lunch program for elementary students as well as a plan for an improved lunch program for the next academic year.

Business Management Experiences

The first phase of the internship involved work in the business office under the direct supervision of the business manager. She assigned projects to the intern and assisted with some problems that...
developed during the completion of the project. The problems included determining the correct computational formula for calculating revenue amounts due the district and amounts received from local property taxes. She took the time to explain the purpose of each assigned project and how it was related to the overall business office operation. The intern was provided access to all materials and data needed to complete the assigned tasks. Completed tasks were submitted to the business manager for a final review and approval. She then gave this material to the superintendent for his signature and/or information.

**Business Office**

The business manager for the Bloomingdale School District had two assistants who reported directly to her. One was a payroll clerk who was responsible for all payroll computations, check writing, record keeping, and quarterly report summaries for state and federal agencies. A second assistant processed all district supply requisitions, wrote purchase orders, checked in materials as they were received, and processed hot lunch funds. She was assigned other tasks related to district activity funds as the need arose.

**Township Tax Assessments**

The intern's initial project was to review financial reports submitted to the school district by local township tax assessors and to determine what changes in property tax income for the district resulted from changes in assessed valuation of local district property.
Property owners exercised their right to appear before local township tax review boards. Those most likely to do so were owners of farms of 100 to 300 acres of land. The business manager was advised by township treasurers that changes in assessed valuation had resulted from hearings before review boards, and that this would result in a reduction in anticipated revenues for the school district. The project involved a calculation of the amount of income the district received as opposed to the income the superintendent had anticipated.

At the time of the internship, the Bloomingdale School District had six townships within its borders. The income from property taxes was broken down by townships and was paid to the district by treasurers of the various townships. When funds were received by the business office, the amounts were recorded, and the funds outstanding were determined. The amount due from any one township was calculated by multiplying the state equalized evaluation by the total mills levied. Township treasurers submitted reports that reflected the amount of actual income the district had received in 1978. These figures were compared with the income received during the fiscal year of 1977.

The following data reflect the income received by district townships for the years of 1977 and 1978. The 1978 figures show a decrease in income for the Bloomingdale School District. This decrease was a result of lower tax rates for parcels of land whose owners had successfully appealed their assessed valuation rates at township tax review board meetings.
### Income by Townships Generated by Property Taxes

<table>
<thead>
<tr>
<th>Township</th>
<th>1977</th>
<th>1978</th>
<th>Decrease</th>
</tr>
</thead>
<tbody>
<tr>
<td>Bloomingdale</td>
<td>151,025</td>
<td>150,950</td>
<td>75</td>
</tr>
<tr>
<td>Casco</td>
<td>5,672</td>
<td>4,808</td>
<td>864</td>
</tr>
<tr>
<td>Cheshire</td>
<td>35,190</td>
<td>35,190</td>
<td>0</td>
</tr>
<tr>
<td>Columbia</td>
<td>154,899</td>
<td>154,306</td>
<td>593</td>
</tr>
<tr>
<td>Lee</td>
<td>245,286</td>
<td>244,417</td>
<td>869</td>
</tr>
<tr>
<td>Waverly</td>
<td>48,090</td>
<td>47,920</td>
<td>170</td>
</tr>
<tr>
<td><strong>Totals</strong></td>
<td>640,162</td>
<td>637,591</td>
<td>2,571</td>
</tr>
</tbody>
</table>

Thus, in 1978, the school district received $2,571 less than in 1977 due to changes in assessed valuation. This data was important because the superintendent and the business manager needed accurate information so they could plan programs and establish budgets for the district.

The business manager discussed the various aspects of anticipated revenues with the intern and explained how voted mills, taxes levied, and eventual payments of taxes to the district were interrelated. She explained that revenues due the district were not paid in one or two lump payments, but that payments were received from local township treasurers as property owners paid their taxes. Payments were received each month from December to May in any one year.

### Compensatory Education Programs—Budget Updating

The district, like many others in the state and nation, had federally funded compensatory education programs in reading and math.
The intern worked with the budgets for ESEA Title I and State Chapter III Services. The Chapter III program served 150 students in grades kindergarten through the sixth grade. Eligible students qualified for extra instructional help in math on the basis of test scores and instructor referrals. The Bloomingdale Chapter III Program staff included one teacher-coordinator and three aides. The coordinator developed the program goals, processes, and budget. The business manager assisted with the budgeting phase of the program planning activities.

As the program operated, salaries were paid, supplies purchased, and deductions were made from the budget accounts of the program. The business manager asked the intern to review each account in the budget and to record the total amount allocated to the accounts and deduct amounts spent. This resulted in a "balance remaining" figure for each account. The first step in the budget update was to list all account areas as well as amounts allocated and spent. When this data was processed, an account balance resulted. The following account categories were included in the Chapter III budget:

**Instruction**
- Teacher and three aides
- Teaching aids and materials
- Employee benefits

**Instructional improvement**
- Coordinator's salary
- Coordinator's fringe benefits

**Operations and maintenance**
- Testing and research
- Parent advisory council
- Capital outlay
- Custodial services
The intern learned how to use the ledger card file. Individual ledger cards were prepared for each account in the Chapter III program. Cards for salaries, supplies, fringe benefits, capital outlay, and custodial services were used. Each card included the following information: account title, total amount budgeted, amounts spent, and an account balance. When a check was written against each account, it was posted by an accounting machine on appropriate ledger cards. This process was called posting accounts. It was done monthly, which resulted in current account balances.

The ledger cards for the Chapter III program reflected current balances for all accounts except teaching supplies. The intern examined all requisitions, purchase orders, and checks written against the teaching supply account so that an accurate amount spent could be computed. Completion of this task took longer than it would have if the ledger card for teaching supplies had been posted each month.

The project was completed by the intern and an updated budget summary was submitted to the business manager. See Appendix C for the Chapter III Budget Update Report.

Title I—Budget Update

The Title I program served 280 students in kindergarten through the 12th grade. This was a compensatory education program that focused on small group reading instruction. Students who were one grade level or more behind their current grade placement according to test score data, could qualify for placement in a Title I program. The Title I program included a director, five full-time instructors,
and eight teacher aides.

Accounts were updated in the same manner as the Chapter III accounts. The ledger cards were used to compute balances for each account. The intern was given an added assignment of finding account numbers in the New Michigan School Accounting Manual and assigning them to corresponding accounts in the Title I budget. The intern was relatively familiar with the accounting manual having recently completed a course at the university called School Business Management. Due to the size and complexity of the Title I program, the budget update took more time than had been anticipated. The budget and account balances were submitted to the business manager for review and approval. See Appendix C for Title I Budget Update and Account Balances.

Title I-B—Budget Update

The Title I-B program was designed to increase teacher skills and competence in reading instruction. It was an integral part of the district's certified staff development program. This program provided funds for teacher development programs, reading conferences, supplemental reading materials, and teacher incentive grants to cover the costs of teacher-made reading games. The program did not involve the hiring of special reading instructors, but a director's salary was included in the budget. A large part of the budget, $1,900, was allocated for tuition payments for a college level course in language arts provided by Western Michigan University and held at the Bloomingdale Elementary School.
The ledger card system was established for the Title I-B program and account balances were calculated. See Appendix C for Title I-B Budget Update and Account Balances Report.

**Fuel Tax Reimbursements**

Many school districts that operate a transportation system for students purchase fuel from local suppliers. The total number of gallons of gasoline delivered once a week were recorded in the district's business office. The Bloomingdale School District was eligible to apply for a refund of state taxes for locally purchased gasoline. The business manager assigned the intern to review the delivery tickets, total the gallons delivered from July 13, 1977, to February 1978, and compute the amount of tax paid at 9c per gallon. The district bought 33,659 gallons of gas and was eligible for a refund of $3,029. This was by far the most clerically oriented assignment the intern was given, but it was important to be aware of and understand the facets of reimbursement programs that are available to school districts. Money refunded can be spent for non-transportation expenses, thus it was well worth the time and effort involved in computing and applying for the gasoline tax refund.

**Michigan Unemployment Benefits Paid**

The school business office received quarterly reports from the Michigan Employment Security Commission. These reports indicated the amount of unemployment benefits paid to former employees of the school district. At the time of the internship these employees were
not employed by the district due to staff reductions and/or resignations. The business manager wanted the intern to check the state payment receipts against district processed records to assure that the unemployment account in Lansing had not been charged for payments to persons who had not worked for the district. If any irregularities between state and district records were discovered, the district had only 20 days after receiving a quarterly report in which to file an adjustment request. The request was filed with the nearest Michigan Employment Security Commission office, which was in South Haven, Michigan.

An examination of the records indicated that the unemployment account had been charged $840 for an employee who had never worked for the school district. The intern informed the business manager, and she promptly called the South Haven office of the Michigan Employment Security Commission. The district filed an adjustment request form the next day. The business manager explained that this was a clerical error on the part of the South Haven office, and that the school's account would be credited for the amount involved within 5 working days.

**Investment of State Aid Payments**

One of the more interesting business office experiences the intern had was studying the program involved with the investment of state aid payments received by the school district. The funds were invested in short term certificates of deposit. The business manager took the intern to a local branch of the Michigan National Bank to
review the investment program with the bank's manager.

School districts receive state aid funds quarterly and if the funds are not needed for a payroll or supplies, the money can be invested in 30- or 60-day certificates of deposit. Funds invested in this way earned a higher interest income than if they had been deposited in conventional savings accounts. The district deposited $200,000 in a 60-day certificate and the interest rate paid was 6.5%. The business manager told the intern that it was wise to explore investment markets and purchase certificates of deposit that pay the highest interest rates. This extra interest income was used by the district, thus the time involved was not wasted.

Food Service Assignment From Board of Education President

A citizens group, the Bloomingdale Parent's Club, informed the board of education president that they had circulated petitions in the community that requested the board to initiate a study of the existing hot lunch program for elementary school students. Due to a split shift program for junior and senior high school students, they did not participate in the lunch program. The board president informed the intern about the petition drive effort and asked him to chair a food service investigatory committee. The petitions were presented to the board at the September meeting, and the committee was formed that evening. The committee included: the intern, the superintendent, a community representative, and two food service employees that worked for the district.
The existing food service program that the citizens objected to was established in 1972. The board of education took steps at that time to make all elementary school lunch programs comparable. Before that time, elementary students in the Bloomingdale Elementary School were served a conventional approved Type A hot lunch. School lunches that included three ounces of protein, two ounces of bread, three ounces of a fruit or vegetable, and a half pint of milk were classified as approved Type A lunches by the State Department of Education and the United States Department of Agriculture. These lunch costs were reimbursed through the federally funded hot lunch reimbursement program. The lunches were prepared in the high school kitchen and were transported a short distance, about 1/8 mile, to the elementary campus. About 325 students participated in the hot lunch program at that time.

Seventy students in one of the smaller elementary school buildings and 120 in another school had no formal food service available. These students brought lunches to school each day. They bought milk at each of their school buildings. There were no parent complaints concerning these arrangements. The superintendent discussed the lack of comparability between the food service programs at the three elementary units with the board of education. At that time, the board discussed the lunch programs and decided to make all elementary food services equal. They accomplished this by eliminating the Type A program at the Bloomingdale Elementary School. They instituted a hot sandwich program for all elementary schools. The sandwich program consisted of a sandwich item that was heated in small ovens and
served to students. Milk was bought by students. This program did not meet the state and federal standards for a Type A classification, thus costs were not reimbursable. The superintendent had consultants from the State Department of Education visit the district and they made suggestions that would improve the lunch program. The sandwich program was supplemented with fresh fruit and juice, desserts, and cheese sticks. After this was done, the program qualified for a Type A rating and was then reimbursable.

The revised program was better than the "sandwich only" plan, but students and parents were not satisfied. A frozen sandwiches program including hot dogs, hamburgers, cheese sandwiches, Burritos, and pizzas were heated and served to students. Fruit, desserts, and milk accompanied the sandwiches and the daily cost for students was 55¢. This cost factor seemed to be the point of concern for parents and students. They believed they paid too much for too little. They noticed that neighboring school districts served hot lunches that cost 35¢-40¢ per unit.

The board of education requested that the committee investigate the existing food service program and make recommendations for a revised and improved program for the next school year. The committee was familiar with the old program, thus they had to consider ways that could be used to have an improved lunch program for all elementary students in the district.

The committee held its organizational meeting at the Bloomingdale Elementary School on September 19, 1979. The members asked the intern to serve as chairperson for the group. The committee decided
to divide tasks among members as follows: The entire group would develop a simple food service questionnaire for students to complete. Students indicated their satisfaction or dissatisfaction with the old program and made menu suggestions for a new program. The superintendent explored new equipment and additional staff costs for a revised program. He also investigated state level reimbursement programs for initiating a new hot lunch program.

The committee visited four neighboring school districts and observed their food service operations. The following factors were noted at each district: serving methods, menu items, student participation, food purchasing techniques, and per unit costs of lunches. The food service committee observed various lunch programs and identified one as superior to the others observed. This one was a plan that closely resembled a program the committee decided would be successful in the Bloomingdale District. All food items were processed in a central kitchen and were transported to serving sites. Trays were assembled at each serving site. Costs were projected at approximately 35¢-40¢ per student lunch. The cost estimates for this plan were estimated by the superintendent. They were:

1. Staff costs--$13,263--This included salaries for one cook, a dishwasher, two serving assistants, and a delivery van driver.

2. Equipment costs--$6,850--This included two warming units and a food delivery van.

The food service equipment costs were low because the high school had a state approved kitchen that was well equipped, and the only new items needed were a delivery van and electric warming units
for serving sites.

Student opinions about the existing program and menu suggestions for a revised plan were reflected by the completed questionnaires. The questionnaire used for the study has been included below.

Hot Lunch Questionnaire

1. Do you like the present hot sandwich program?
   Yes _____
   No  _____

2. Would you like a hot lunch that included more menu variety?
   Yes _____
   No  _____

3. List three of your favorite foods that you would like for lunch next year.
   ___________________  ______________  ______________

The questionnaires were tallied for each elementary school. There was a slight variation concerning satisfaction with the existing program and menu suggestions from school to school. The results of the study are summarized below.

<table>
<thead>
<tr>
<th>Item</th>
<th>Bloomingdale</th>
<th>Grand Junction</th>
<th>Pullman</th>
</tr>
</thead>
<tbody>
<tr>
<td>1.</td>
<td>Yes - 74</td>
<td>Yes - 33</td>
<td>Yes - 40</td>
</tr>
<tr>
<td></td>
<td>No - 228</td>
<td>No - 5</td>
<td>No - 51</td>
</tr>
<tr>
<td>2.</td>
<td>Yes - 279</td>
<td>Yes - 25</td>
<td>Yes - 80</td>
</tr>
<tr>
<td></td>
<td>No - 33</td>
<td>No - 13</td>
<td>No - 11</td>
</tr>
</tbody>
</table>

The following menu items were taken from student questionnaires. Items have been listed from most popular to least popular.
The committee members discussed the questionnaire results and concluded that students expressing satisfaction with the existing lunch program came from socially and economically deprived homes and seemed to be satisfied because any kind of lunch was better than not having any at all. Other students that expressed a dissatisfaction with the existing program came from middle and upper lower class families and seemed to be more critical concerning the type of lunch they received. The committee reviewed the opinions of students from schools visited concerning menu items in their lunch program. When they participated in menu planning, the program was more popular than if the lunch program was imposed on them; i.e., it was not "their program."

The committee met in October to draft a final report which was submitted to the board of education. A sample of the student

<table>
<thead>
<tr>
<th></th>
<th>Bloomingdale</th>
<th>Grand Junction</th>
<th>Pullman</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Pizza</td>
<td>Pizza</td>
<td></td>
<td>Spaghetti</td>
</tr>
<tr>
<td>2. Sloppy Joes</td>
<td>Hamburgers</td>
<td>Sloppy Joes</td>
<td></td>
</tr>
<tr>
<td>3. Spaghetti</td>
<td>Hot Dogs</td>
<td>Pizza</td>
<td></td>
</tr>
<tr>
<td>4. Tacos</td>
<td>Sloppy Joes</td>
<td>Macaroni</td>
<td></td>
</tr>
<tr>
<td>5. Hot Dogs</td>
<td>Barbecues</td>
<td>Hamburgers</td>
<td></td>
</tr>
<tr>
<td>6. Fried Chicken</td>
<td>Cheeseburgers</td>
<td>Tacos</td>
<td></td>
</tr>
<tr>
<td>7. Barbecues</td>
<td>Chicken</td>
<td>Barbecues</td>
<td></td>
</tr>
<tr>
<td>8. Hamburgers</td>
<td>Burritos</td>
<td>Chicken</td>
<td></td>
</tr>
<tr>
<td>10. Soups</td>
<td>Ravioli</td>
<td>Fish Sticks</td>
<td></td>
</tr>
</tbody>
</table>
questionnaire was included as were the statistical results. Menu suggestions were listed. New equipment and personnel costs were explained. The committee discussed the fact that secondary level students participated in lunch programs visited in neighboring districts. The higher the rate of student participation, the lower the costs tended to be for individual student lunches. The lunch program for Bloomingdale students included only elementary level students. The superintendent estimated that a per unit cost of 40¢ was possible.

The committee made the following recommendations:

1. Implement a revised and improved lunch program for all three elementary schools. A central commissary concept would be used. Meals would be prepared in one kitchen and transported to a serving site at each school.

2. The business manager would develop and supervise budgetary and purchasing facets of the program.

3. A committee would be formed that included: building principals, a food service director, a citizen representative, and students. This group would develop and revise lunch menu items. It would evaluate the program during the year.

4. Chocolate milk would be served each day to students who wanted to buy it.

The board of education thanked the committee for its work and voted unanimously to implement the program as recommended by the committee. The superintendent was instructed to contact the appropriate office of the State Department of Education to make a formal application for start-up cost reimbursements. The committee completed its assigned tasks, and was disbanded.
The intern's field supervisor, Dr. Donald Dragoo, asked the intern to attend meetings of school district administrators for the purpose of observing the superintendent's leadership style and interaction with subordinates. Administrators who attended these meetings included: all building principals, the director of transportation-buildings and grounds, the director of reading, and the business manager.

The first meeting the intern attended was called by the superintendent to discuss and resolve a class size problem at one of the elementary schools. The building housed students in kindergarten through fifth grade. The master contract between the board of education and the teachers' union addressed the class size issue. As stated in the contract, early elementary classes were not to have more than 25 students in attendance. The first grade class at the problem school had 30 students enrolled. The building principal had rescheduled a teacher's aide in the building so that she could assist the first grade instructor, but that had been intended as a temporary measure until the superintendent could investigate and resolve the problem. The instructor was satisfied with the extra help the aide gave, but the president of the teachers' union wanted the enrollment for the class decreased to the limit described in the master contract between the board and the teachers. The superintendent assigned the task of resolving this problem to the intern, despite the fact it was not consistent with the purpose stated above.
The intern met with the union president, the instructor, and the director of transportation. It was decided that a change in the enrollment could be achieved by transferring five students in the first grade to another elementary school located six miles east of the problem school. The director of transportation was able to develop a bus route change for the five students. Parents were contacted by the building principal and the receiving instructor was advised concerning the entry of new students. The parents of the students did not oppose the change, because they appreciated the advantage that being in a smaller class would give their children. The problem was resolved in one work week, and the intern learned that team approach to a problem can and does result in a satisfactory solution.

**Personnel Policy Change**

The superintendent of schools informed the intern that he had decided to make certain changes in the working conditions for all building secretaries and teacher aides. The plan had been considered by the superintendent for a month. He chose this opportunity, his second administrators' meeting, to announce his newly developed plan.

Historically, building secretaries had worked for 7-1/2 hours per day, but had been paid for an 8-hour day. This arrangement had been made by the previous superintendent with building secretaries. The justification for this agreement was that if required to do so, building secretaries would work more than 8 hours a day, but would not receive any over-time compensation. There were isolated instances during the school year when lengthy attendance reports were prepared.
by secretaries. At these times, they worked longer than an 8-hour day to meet report submission deadlines. Building secretaries called substitute teachers when regular instructors were ill. This was not considered a part of their jobs, and they were paid an extra $200 per school year for this service. The calls were usually made from their homes before regular school hours, each morning.

The superintendent stated that he had made the following changes in working conditions for secretaries and aides. Building secretaries would not be paid the "extra" $200 a year for calling substitute teachers. This task was to be considered an integral part of the job, thus extra compensation was not required. Secretaries would not have a paid 30-minute lunch period. If they wanted to maintain their salary or earnings per day, they would have to extend their work day by 30 minutes.

The superintendent continued the meeting and announced that teacher aides would not be paid for their 30-minute lunch period as per his new plan. They too would be able to lengthen their work day to make up for lost wages!

The superintendent directed the building principals to inform secretaries in their respective buildings about the new working conditions and to enforce the new policies. The superintendent would contact the president of the secretary-teacher-aide union and explain the changes. The union grieved the proposed plan and the superintendent abandoned his nonpayment for sub calling proposal.

The superintendent asked the intern to meet with the high school principal and discuss a proposed staff development program for
secondary level instructors. The high school principal had expressed his concerns about community relations and discipline in the secondary schools and believed that a staff development effort would be beneficial to the district and improve community relations.

The intern met with the principals and they explained that the secondary teaching staff needed to increase their skills in handling class discipline and communications with parents. They indicated that the instructors believed that district parents did not support teacher efforts to improve student discipline in the schools. Parents indicated to the intern that teachers let the students have too much freedom and let students have too much input concerning how classes were conducted. The intern discussed these issues with staff and principals and after hearing the concerns, decided that there was a legitimate need to improve teacher skills in student discipline and subsequent communication with parents.

The intern reported these facts to the superintendent and the business manager. A staff development program was identified by the high school principal. The cost of the program for 30 teachers was $500. The program included techniques for improving time management for classroom teachers as well as information about building better community relations. The program included eight meetings, one per month, and professionally developed materials for teachers and parents. A follow-up evaluation of the program was included in the design of the program.

The superintendent and the business manager reviewed the information given to them by the intern. At that time, the business manager
was not sure if the budget could accommodate the expenditure since no provisions for staff development programs of this type had been included in the budget. The superintendent stated that the program had some merit, and he would make an effort to reallocate funds to finance the staff development program pending approval of the board of education.

Requests for Student Records

The superintendent assigned the task of developing appropriate forms and procedures for parents to view student records to the intern. The family rights and privacy act of 1974 had a definite impact on procedures that must be followed when records were made available to parents of students. The intern reviewed board of education records and learned that at the November 25, 1974, meeting, the board of education had approved a policy that covered the basic requirements of the Family Educational Rights and Privacy Act of 1974.

The intern consulted the district's law firm in Lansing, Michigan, and submitted forms that the district planned to use for parent requests concerning access to student records, files, and academic data. The firm of Thrun, Maatsch, and Nordberg gave its approval of the forms the intern submitted. Access to student record forms for parents, students, and governmental agencies were developed. A separate form was developed for educational institutions to use when requesting the transfer of student records from one district to another. Copies of all forms are included in Appendix A. The superintendent reviewed and approved the forms as submitted by the intern. They
were used by the district at the time of this writing.

Summary

The intern participated in various learning activities in the areas of business office operations, personnel supervision, and an evaluation of an existent hot lunch program. Suggestions for an improved lunch program were requested by and submitted to the board of education. The intern worked with the superintendent and gained additional insight into the daily operation of the central office. The internship experiences enabled the intern to accomplish most of the objectives in the prospectus. The opportunity to estimate utility costs for the next fiscal year did not occur.

The projects found to be most beneficial were business office projects that involved sources of district income, revising Title I and Chapter III budgets, and the investment of district funds in short-term certificates of deposit. A closer working relationship with the superintendent would have been profitable, but this was not realized. The special assignment from the board president that involved an evaluation of the existing lunch program and the development of suggestions for an improved program provided many learning opportunities for the intern.
CHAPTER III

LITERATURE AS RELATED TO PRACTICE

Introduction

After having worked in and having observed daily operations at the district's central office, the intern selected three areas for analysis: the superintendent's leadership style, personnel planning for the district, and business office operations. These areas were selected because the educational growth and development of the intern could be enhanced through experiences in these areas. For the purposes of this study, each area will be identified and pertinent information and/or theory from the literature will be cited as a background for a discussion of each area. The concept of what could be will be contrasted with actual practices observed by the intern.

Literature Review

Leadership is a general term that is used to describe the process of leading. It has various implications for theorists in the fields of industrial psychology, education, and sociology. The definition of leadership provided by Gibb states that: "Who leads is determined by the situation or problems at hand, and so different people lead at different times" (cited in Boles & Davenport, 1975, p. 115). Boles and Davenport (1975) addressed the concept of leadership in their book Introduction to Educational Leadership. They stated:
Leadership is a process in which an individual takes initiative to assist a group to move toward productive goals that are acceptable, to maintain the group, and to dispose of those needs of individuals within the group that impelled them to join it. (p. 117)

Any discussion of leadership usually results in the conclusion that it is a process as opposed to an act. The process includes four phases as described by Boles and Davenport (1975):

1. Goals are set that are acceptable to group members in that they can be achieved.

2. A leader is chosen or emerges through group members legitimizing an individual to make decisions or to take actions that affect all.

3. The means for achieving goals are agreed upon.

4. Group members set limits on the leader's authority. (p. 119)

Those who lead do so in an observable manner or style. A leader displays a style of leadership as she/he leads a group or an organization in achieving its goals. Weber theorized that: "Style of leadership is a function of the personality and needs disposition of the performer and is related to his perceived source of authority" (cited in Boles & Davenport, 1975, p. 234). Boles and Davenport (1975) hypothesized that: "A leader who believes his authority is an integral part of his job will tend to be autocratic" (p. 135). This contrasts with the leader who believes that his authority stems from his subordinates. He will tend to be democratic.

Introduction

The following situations describe the leadership style of the superintendent this intern worked with during the internship. The
intern could find no support in the literature for the sometimes inconsistent and often autocratic leadership behaviors demonstrated by the superintendent.

School Board Meeting Agenda Development

The superintendent developed board meeting agendas as the need arose. He referred to the previous meeting minutes and determined if any old or unfinished business existed. This type of information was used to develop a new agenda for a future school board meeting. The superintendent became aware of the fact that a group of parents were concerned about what they considered to be an unsafe bus stop location near their homes. The parents intended to bring their problem to the next board meeting. They had discussed the issue with the director of transportation and the superintendent and were told that all district bus stops conformed to guidelines established by the State Department of Education's Transportation Division in Lansing, Michigan. The parents were not satisfied with the superintendent's response to their complaint. They contacted a school board member and told him that they would attend the next board meeting. The superintendent told the intern that he would schedule the parent group under citizen comments and that this category would appear at the end of the board meeting agenda. He stated that his intent was that if the parent group had to wait, they might grow tired and leave before the issue was discussed. He could have placed the parent group at an earlier spot on the agenda, but he chose not to do so. He believed that he had the sole authority to determine where bus
stops would be located and he had little if any interest in parent opinions about the issue. This reflected his autocratic style of leadership. He told the intern that this approach to parent complaints had worked well in the past and he wanted to try it again.

Revision of Annual Budget

The superintendent's lack of consideration for his central office staff was not always obvious to those who did not work there each day. One Friday the business manager, two clerks, and the intern were involved with preparation of an updated annual budget. The old budget had to be updated due to recent settlements that involved wages and fringe benefits for district teachers and secretaries. The superintendent was aware of the tedious project, but he still called the business manager into his office. He explained that he had an important problem that had to be solved. We were asked to assist the business manager as she searched for his misplaced pipe. The lost pipe was found and we returned to our budget revision project. This was not an unusual example of his behavior. Trivial problems often became major crises when the superintendent was inconvenienced.

Teacher Grievance Case

Another example of the superintendent's attitude toward leadership was demonstrated by the way he responded to a grievance submitted by a tenured instructor in the district. The instructor applied for and was denied a coaching position by the superintendent. The instructor had been the head negotiator for the teachers' union and
as such had worked with the superintendent, the board president, and the district's lawyer during the negotiation of the master contract.

A tenured middle school science teacher applied for a coaching position which was posted by the district's athletic director. Due to a split shift schedule for high school and middle school students, middle school hours start at 12:30 and end at 5:30. The coaching position applied for involved a high school basketball team. The players finished their instructional day at 12:30. The superintendent denied the instructor's application because he would miss from one to two hours of class time with his middle school students. The superintendent would not consider hiring a substitute teacher for the coach when his coaching duties overlapped with his middle school instructional day. The superintendent claimed that substitute costs would constitute a financial hardship. The posted position was filled by a college senior from Western Michigan University. This action was approved by the superintendent even though it was direct violation of the master contract between the board and the teacher union. The contract specifically stipulated that openings be filled by certified instructors and that consideration be given to presently employed district personnel. The science instructor grieved the situation and the union followed the various levels for processing grievances as specified by the master contract. The unresolved case was finally submitted to an arbitrator. He heard the case and found for the instructor. He stated that the contract had been violated and that the instructor should be paid for the coaching season.
The intern was aware of the instructions that the board president had given the superintendent concerning this case. The board president and the superintendent agreed that this particular teacher would not be given the coaching position because of his previous activities as chief negotiator for the teacher union. Both the board president and the superintendent realized that the master contract had been violated by the employment of a noncertified and non-district employee.

The issue to be considered was that two men in leadership positions permitted their personal feelings of hostility toward an instructor to govern their actions. These actions resulted in costly grievance and arbitration expenditures for the district. The district lost twice because the college student was paid for coaching the basketball team and the district instructor was paid as per the decision of the arbitrator. The board president and the superintendent displayed an autocratic style of leadership throughout this entire situation. Observing the master contract stipulations and using a team approach to solve district administrative problems were concepts that apparently neither man believes in nor practiced.

Personnel Working Conditions

The superintendent, with the support of the board made policy changes that affected the working conditions of building secretaries and teacher aides. Building secretaries had been assigned the task of calling substitute teachers to replace teachers who were ill. The secretaries were paid according to the number of teachers assigned to
the school in which they worked. The average amount paid to each secretary was $150 to $200. The total cost for the service was about $1,000.

The superintendent was displeased with the aides and secretaries because they formed a union and he had to negotiate a contract between their group and the board. Hard feelings resulted and he took this opportunity to punish them for unionizing. He announced at a principal's meeting that secretaries would not be paid for calling substitute teachers. The task would be considered as an integral part of their regular workday. The principals and the business manager had not been asked for their input concerning this issue. The decision had been made by the superintendent and it was to be implemented as soon as possible. When the news of the new policy reached the president of the secretaries union, she requested an appointment with the superintendent. He grudgingly met with her, but no change in the new policy resulted. He told her he had the authority to make such changes in district personnel policy and did so to best serve the financial interests of the district.

The style was familiar—changes in policy were made without consulting those most affected by the changes. If the actual reasons for this change had been known to the secretaries, they would have understood why the change had been made. It seemed that the superintendent was punishing them for forming a union that the board had to recognize and negotiate with. Poor morale and negative attitudes toward the district on the part of secretaries could be more costly than the money paid to them for calling substitute teachers. The
superintendent could have achieved a more positive result if he had eliminated the extra compensation but substituted a fringe benefit in its place. Extra personal business days, more sick days, or a paid holiday could have been considered. The intern found no support for the superintendent's inconsistent and at times vindictive behavior. Theorists and researchers in personnel administration stress a team approach to management but this philosophy was not practiced in the district where the internship was completed.

Superintendent's Philosophy of Administration

The intern had a conference with the superintendent during which the superintendent asked the intern to describe his philosophy of administration and staff supervision. The intern discussed his philosophy in terms of a team approach. Instructors, principals, and the superintendent can make a team effort to solve district problems and to achieve system goals. The chief administrator should involve subordinates in the development of policies and programs as opposed to imposing them on staff members. If staff members contributed to policy and program development, the results would be more effective and permanent. The intern found support for this type of philosophy in McGregor's Theory Y concerning the management of employees. McGregor developed a classic view of humanity and discussed it in his famous Theory X and Theory Y approach to management techniques. According to Theory Y:

1. Expenditures of physical and mental effort in work is as natural as play or rest.
2. External control and threat of punishment are not the only ways to get workers to achieve organizational goals.

3. People will exercise self-direction and self-control to achieve organizational objectives to which they are committed. The average worker will accept and seek responsibility.

4. Commitment to objectives is a function of the rewards associated with their achievement. Such rewards are: ego and self-actualization needs.

5. Workers can be creative and display ingenuity as they identify organizational problems.

6. We utilize a small part of the worker's intellectual potentialities in the present conditions of modern industrial life. (Boles & Davenport, 1975, p. 22)

The superintendent stated that he had anticipated this type of response to his initial question. He explained to the intern that he based his approach to administration and supervision on the Theory X view as explained by McGregor. Workers must be closely watched and required to follow administrative policies, rules, and regulations. The team approach was too academic to be practical. Nothing would get done unless the superintendent applied pressure on subordinates.

McGregor's Theory X suggests that:

1. The average man dislikes work and will avoid it if possible.

2. Due to a dislike of work, workers must be coerced, controlled and threatened with punishment to get them to make adequate efforts toward achievement of organizational goals.

3. The average worker prefers to be directed, wants to avoid responsibility, has little ambition, and seeks security above all. (Boles & Davenport, 1975, p. 22)

The intern found that the superintendent practiced the behaviors described by McGregor's Theory X.
Personnel Planning

Planning is one of the most important activities for an organization's administrative staff. Castetter (1976) stressed the value of planning for school districts. He stated: "Planning is the school system's most effective way of projecting its intentions and the most reliable method of achieving its mission" (p. 87). In his discussion of planning concepts and their relation to personnel functions, he listed the results of poor planning. The following is a representative listing of these results:

1. Educational programs that have been established on inadequate conceptual basis.

2. The use of Federal and State moneys to initiate programs that are not congruent with system goals.

3. The psychic anxieties of personnel, probably created by system plans, rules, procedures and administrative irrationality.

4. Failure to anticipate manpower shortages and surpluses.

5. Planning for, but not by and with personnel.

6. Viewing personnel as an end rather than a means. (Castetter, 1976, p. 62)

Planning should not be interpreted or viewed as an end in itself, but as a means to an end. Castetter (1976) described this concept as follows:

Effective planning enables administrators to put means and ends into perspective, to identify alternative approaches to personnel problems, select strategies for problem resolution and revise plans when errors are detected. (p. 87)
The intern did not observe district personnel planning practices as described by Castetter during the internship period. Manpower planning, staff development, recruitment, continuity of service, and induction programs were not apparent in the district. Personnel practices that did resemble those identified by Castetter were: compensation plans, collective negotiations, and security. A well developed manpower planning program would enable the district to better anticipate its manpower needs. The only activity that the intern observed was the superintendent's review of teachers who had submitted resignations. He then noted the vacancies available and contacted university placement services. Candidates who applied were screened and interviewed by the superintendent. He made all staff selections. This was an example of centralized screening and hiring as opposed to a centralized screening and decentralized hiring.

The district where the internship took place, had no induction programs for new employees. New teachers reported on the same day that experienced staff members came to work. Orientation to the community and the individual school unit was not practiced. This resulted in confusion for building principals and a feeling of not belonging in the community for new instructors.

Castetter (1976) devoted a major portion of his book, *The Personnel Function in Educational Administration*, to planning. Planning processes and the benefits of having and using them were fully discussed. Effective planning can be compared to a well developed problem prevention system. The lack of effective planning in the district resulted in administrators moving from one crisis to another.
as they attempted to plug holes in the dike to prevent the flood from inundating the district's educational efforts. Frequent administrator turnover has resulted from poor or nonexistent personnel planning practices. In the last 10 years, four high school principals have left, and three superintendents have resigned in the district where the internship occurred.

**Business Office Practices**

The business office was located in the central office complex and was considered as an integral part of the superintendent's office area. The district employed a full-time business manager. She had worked for 10 years as a bookkeeper and accountant in a school district near Kalamazoo, Michigan. Her training and experience had prepared her to be an efficient record keeper and bill payer, but she did lack planning skills and an appreciation for the district's chief goal: the education of students.

Candoli, Hack, Ray, and Stollar (1973), the authors of *School Business Administration, A Planning Approach*, aptly described the traditional role of a school business manager. They stated: "Yesterday's business manager was a chief control officer of the school system who inspired a range of emotions from acceptance as a necessary evil to pure hatred" (p. 7). The business manager of the past was viewed as a glorified bookkeeper and bill payer. These functions were important aspects of the job, but they should not have overshadowed planning activities and effective communication with staff members. Candoli et al. (1973) stressed the importance of planning
by the business manager when they said: "Operationally, educational systems move from crisis to crisis with the chief administrator and his staff bouncing from one trauma to another like puppets on a string" (p. 13). Schools should benefit from the experiences of business and military communities. They too would benefit from the planning function as it helped them develop realistic goals and program implementation processes. Candoli et al. (1973) and Castetter (1976) described long- and short-term planning activities which would help a system develop and achieve its goals. The education of students, development as a district, and survival as an institution were goals identified by both authors.

The business manager in the district where the internship was completed, developed the yearly budget in close conjunction with the district superintendent. She provided data concerning the previous year's budget and line items that needed to be increased to meet rising costs. Salaries, teaching supplies, utility expenses, and fringe benefits were a few examples of budget areas. The superintendent made decisions about academic programs, district objectives, and federally funded programs. Funds were allocated according to decisions made by the business manager and the superintendent. It was a limited budget making process.

The intern asked the business manager if staff participation would have been helpful in budget development activities. She replied: "Teachers and principals don't have the necessary background in financial areas of budget development. Why should they be involved? I don't try to teach Latin for the Latin teacher." This
attitude of "it is a one man show" for budget development was not supported by Candoli et al. (1973) or Castetter (1976). They stressed staff participation.

Planning for programs and district needs was not apparent as the superintendent and the business manager developed the budget. They based the new budget on the previous year's budget and believed that this was an adequate approach to budget development. No assessment of the previous year's successes or failures was made. This was far from the process of budget formulation described by Candoli et al. (1973).

They discussed various types of budget development procedures such as: the administration dominated budget. The concept of the participatory budget seemed to be the one he favored for the modern or enlightened business manager. This budget approach assumed:

1. Schools should consult citizens in planning efforts if the school hopes to get financial support in the future.

2. Those who teach and work in the school should be given a chance to suggest methods and materials they would like to use. (Candoli et al., 1973, p. 172)

The superintendent and the business manager liked to give the impression that budget development was a mysterious and complex operation that they and they alone had the talent and knowledge to accomplish. Local community input was discouraged as was input from any other staff members. This was contrary to the process described by Candoli et al. (1973). They stated:

The participatory theory of budget development provides for the interplay of the school staff and the public. Staff and citizen involvement helps create a better
understanding of education for the future and assists in giving direction and scope to budget development. (p. 173)

The business manager often expressed her intense dissatisfaction with ESEA Title I and Chapter III programs. Both were federally funded compensatory education programs that provided money for extra instructional staff and activities for reading and math. The business manager said that if the teachers did their jobs well, there would be no need for these extra frills. She did not support the teaching staff and constantly criticized their efforts and programs used in the district. Her opinions influenced the superintendent's attitude toward some faculty members and he told the intern that teachers didn't really earn their salaries.

The business office had a payroll assistant and a clerk who processed requisitions and wrote purchase orders. The intern noted that there was a distinct lack of organization and allocation of human resources in the business office. The only system that functioned with some degree of regularity was payroll. This was due in part to the requirement of paying staff members twice a month. The superintendent would often ask for data that was not available, and all business office staff would stop what they were doing and work on the project that he had identified. The business manager seemed to create confusion when she was in the office. She asked the intern to complete a task, and would often assign him a different one before the first one had been completed. This procedure was observed many times by the intern while he worked in the central office complex.
If a particular school ran over its supply budget (teaching), the business manager would call the building principal and claim that teachers were wasteful and should be admonished not to use so many teaching supplies. This overly dramatic and rather threatening approach made principals angry and frustrated with the business manager. The superintendent gave her his full support so principals were not able to ask him for assistance in this type of situation. The literature suggested that a modern business manager would handle this type of problem by working with the principal involved as opposed to using threats and causing tension between staff members. Anger and frustration would be eliminated and reason and constructive action would replace a debate over dollar amounts budgeted and used.

The business manager seemed to lack many of the personal characteristics suggested by Dr. Fredirick Hill. Candoli et al. (1973) listed them in their chapter on "The Position of the School Business Administrator." According to Dr. Hill, the business manager should:

1. Like people and show it.
2. Be able to get along with others.
3. Be a good listener.
4. Possess a high threshold of annoyance and sense of values.
5. Have respect for all with whom he deals.
6. Be compassionate.
7. Never forget that his power is delegated to him by others. (p. 385)

The intern believed that if the business manager had developed more effective communication and human relation skills, her contribution
to the district would have been more positive than it was during the
time of the internship.

In chapter III, actual practices observed by the intern have
been contrasted with what could be according to theorists in the
field of educational leadership.
CHAPTER IV

PROSPECTUS OBJECTIVES ACCOMPLISHED AND THOSE NOT ACCOMPLISHED

The internship provided many beneficial learning opportunities and experiences for the intern. Not all of the intern's expectations as described in the prospectus were realized. In chapter IV, the objectives that were accomplished and those that were not will be identified.

The intern accomplished the conceptual objectives identified as A-1, 2, and 3 in the prospectus. Exposure to the central office work experiences was achieved by working in the office with the staff. The intern worked more closely with the school district's business manager and her staff than with the district superintendent. The business manager provided the intern with varied learning experiences as detailed in chapter II such as: computation of expected revenues due the district from local real estate taxes, updating Title I, I-B, and Chapter III program budgets and calculating balances remaining in each program account. The intern was asked to calculate fuel tax reimbursements due the district by the state of Michigan. The study of unemployment records and payments helped the intern to be more aware of and familiar with quarterly reports for which the district was responsible. The investment of state aid payments in high interest certificates of deposit increased the intern's knowledge of fund investment and interest income for the district. All of the activities
added to the intern's understanding of school business management procedures and budgetary planning.

The internship experience enabled the intern to meet the objectives that were described in the prospectus under the category of human objectives—B-1 and B-2.

As previously noted in chapter II, the board of education president gave the intern a special assignment that involved an examination of the hot lunch program. The president ordered the superintendent to involve the intern and others in a committee that studied the program and made suggestions for the development of an improved lunch program for elementary level students. The program and suggestions that were identified and described by the committee for the board were accepted and adopted.

The intern was able to observe the working relationships that existed among the central office staff. The business manager worked closely with the superintendent and advised him about financial aspects of district operations. All budget development, program planning, fund investment, and related educational costs, were handled by the business manager. At times her suggestions conflicted with those sent to the superintendent by curriculum committees and instructional staff members. The intern observed that her opinions and recommendations had a profound influence on the superintendent and that his final decisions closely reflected the recommendations of the business manager. The business manager and the superintendent developed the annual budget and little if any input was requested from building principals, curriculum committees, or local citizens. The
process was not a team participation process.

The management team concept was nonexistent in the district during the internship period. The intern called this situation to the superintendent's attention, but no changes resulted.

Technical objective C-2 was accomplished as the intern worked with personnel records when ESEA Title I program budgets were updated as described in chapter II. A more complete use of central office personnel records was accomplished when the intern worked on unemployment benefits paid to former district employees.

Technical objective C-3 was achieved to some degree as indicated in chapter II but the intern did not spend a great amount of the internship period on accounting procedures except on those projects that involved a review and revision of Title I, I-B, and Chapter III accounts. The business manager explained the basic aspects of new accounting techniques as described in the new state accounting manual. The cross reference system was an aspect that she took more time to explain to the intern. She showed the intern how to use the new accounting manual and gave the intern various opportunities to ask questions.

Objective C-1, regrettably, was not accomplished because the opportunity to do so did not arise during the internship period. The business manager and the superintendent indicated that this facet of budget development was completed during the summer months. The business manager did explain that she kept a file that reflected local, state, and national trends in cost increases and that this data enabled her to make cost increase estimates that were based on the
information kept in her files.
CHAPTER V

CONCLUSIONS AND RECOMMENDATIONS

Conclusions

The internship experience gave the intern an excellent opportunity to work in the central office with various staff members. As the internship progressed, the intern concluded that four major problem areas existed in the district.

The first problem area involved the superintendent and his leadership style. He consistently reflected a Theory X approach in his management role. McGregor discussed this concept in his widely read Theory X and Y approaches to management. The superintendent displayed an "I'm the boss" attitude and operated the district accordingly. The concept of team management processes were rejected by him several times. He believed that this process would prolong and further complicate any decision making. He preferred to make decisions quickly and never involved building principals in these decisions.

The second problem area was the district's business office. Operations here were not as effective or efficient due to the personal philosophy of the business manager. She shared the same attitudes the superintendent did toward management roles in the district. She firmly believed she and she alone knew what was "best" for the district and its students. The intern asked her if a team planning approach toward budget development would be beneficial. Condoli et al.
discussed this concept and described it as participatory budget development. The business manager said too many ideas from others were undesirable. Teachers knew "little if anything" about budget development processes according to the business manager.

The third problem involved the consistent lack of both short- and long-range planning. The concepts of manpower planning as well as other personnel planning functions were not practiced in the district at the time of the internship. The superintendent and his staff were often faced with meeting deadlines--both from the State Department of Education and the local teachers' union.

The final problem identified by the intern involved the lack of effective public relations within the district. The superintendent was not very responsive to parent concerns, thus parents contacted individual board members if they had questions or concerns about school and their children. The only public relations attempt noted by the intern was the superintendent's phone answering technique. He'd say: "Don Dragoo, may I help you?" He seemed to enjoy the rhyme scheme rather than actually being interested in helping the caller.

Recommendations

The intern believed that both the superintendent and the business manager could be more effective in their management roles if they would implement a team effort toward accomplishing district goals. The business manager should have involved building principals and teacher representatives during budget development activities.
The superintendent should have realized he needed assistance from other management staff as he pursued his role as the chief district administrator.

The intern believed that local citizens should have been involved in district planning activities. The first task would be the establishment of district planning activities that included citizen input.

The problem areas identified and recommendations suggested by the intern were not intended to be definitive or all inclusive. They were basic or fundamental in nature. Many other problems faced the district, but if those noted and described were solved, the district could be improved for the students as well as the citizens.
Appendix A

Access to Student Record Forms
BLOOMINGDALE PUBLIC SCHOOL DISTRICT
RIGHT TO ACCESS AND PRIVACY OF RECORDS

All parents and guardians of students under 18 years of age and all students 18 years of age or over have the right, pursuant to the Family Educational Rights and Privacy Act of 1974, to examine the official records, files and data of the school district directly relating to the student. They also have the right to challenge any of the contents of said records to insure their accuracy and fairness. Procedures for such examination and challenge, including hearings on a challenge, shall be established by the Board of Education and be made available upon request.

No records, files or data directly relating to an individual student shall be made available to anyone without the consent and notification of the student or of the parents or guardian of a student under 18, except (1) the teachers and officials of this school district who have a legitimate educational interest in such information; or unless (2) there has been a federal request for submission of student records in connection with the student's application for financial aid. The student or parent will be notified if officials of a school to which a student intends to enroll desire access to student records, or if a court has ordered access to such records. For other investigation of student records, parental or student consent is needed.

BOARD OF EDUCATION
BLOOMINGDALE PUBLIC SCHOOLS
APPROVED

Adopted by Board of Education—November 25, 1974

Reproduced with permission of the copyright owner. Further reproduction prohibited without permission.
BLOOMINGDALE SCHOOL DISTRICT

Request form to examine student records within the building involved.

Information is requested on the following student: _________________

Specify the type of information being requested:

Cumulative records _______________
Health records ________________
Other ________________________

Individual making this request: Name _____________________________
Address __________________________
Phone ____________________________

Signature of applicant: _________________________ Date ___________

If the applicant is not a teacher or school official within this district, state the interest you have in examining this student's records.

_________________________________________________________________
Records Release Form—Records to be sent to a receiving school and/or other institution.

Date ____________________________

Student ___________________________ Grade Level __________

Address ___________________________ Phone __________________

Parents or Guardians ____________________________

Address ___________________________ Phone __________________

Name and address of school or institution seeking records of above named student.

Name ______________________________

Address ____________________________

Send records to: Name ______________________________

Address ______________________________

I/We consent to the release by the Bloomingdale School District of the records for our child.

Date ________________________________

Signature of Parent/Guardian
Appendix B

Food Service Committee Report
Food Service Committee Report

The Bloomingdale Board of Education requested that a committee be established to further investigate food service needs for elementary school students.

Committee Members: Dr. Dragoo
Mr. Scholley
Mrs. Bernier
Mrs. Baylor
Mrs. Lizak

The committee met and discussed various plans that could be used to change the present sandwich program. Food service surveys were given to all elementary students so that we could get some direct input concerning student attitudes toward the present food program. The following information was obtained from the surveys.

Sample Survey

1. Do you like the present sandwich program?
   Yes ______
   No ______

2. Would you like more cooked lunches?
   Yes ______
   No ______

3. List 3 of your favorite foods that you would like for lunch next year.
   1.
   2.
   3.
Bloomingdale Elementary School Food Survey Results

1. Do you like the present sandwich program?
   Yes 74
   No 228

2. Would you like more cooked lunches?
   Yes 279
   No 23

Grand Junction School Food Survey Results

1. Do you like the present sandwich program?
   Yes 33
   No 5

2. Would you like more cooked lunches?
   Yes 25
   No 13

Pullman Elementary School Food Survey Results

1. Do you like the present sandwich program?
   Yes 51
   No 40

2. Would you like more cooked lunches?
   Yes 80
   No 11
### Menu Items Suggested by Students

<table>
<thead>
<tr>
<th>Bloomingdale</th>
<th>Grand Junction</th>
<th>Pullman</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Pizza</td>
<td>1. Pizza</td>
<td>1. Spaghetti</td>
</tr>
<tr>
<td>10. Steak</td>
<td></td>
<td></td>
</tr>
<tr>
<td>11. Macaroni</td>
<td></td>
<td></td>
</tr>
<tr>
<td>12. Soups</td>
<td></td>
<td></td>
</tr>
<tr>
<td>13. Beans &amp; Franks</td>
<td></td>
<td></td>
</tr>
<tr>
<td>14. Fish Sandwich</td>
<td></td>
<td></td>
</tr>
<tr>
<td>15. Ravioli</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

The committee made visits to other school districts to examine their food service programs. The following districts were visited:

1. Allegan
2. Gobles
3. South Haven
4. Lawton (Mr. Scholley)

The schools visited fed elementary and secondary students. This increases their participation which lowers the cost of lunches. We would only be feeding elementary students. A final cost per student lunch has not been determined at this time.

**Allegan:** Students' lunches—30¢—Elem.
35¢—Sec.
50¢—Adult

**South Haven:**
Students' lunches—45¢
Adults—65¢

The kitchens we visited were similar to that which we have in our own high school. We do not have convection ovens which makes it difficult to quick cook foods.
The plan we have considered the most would be similar to the plan Allegan uses. All foods would be cooked in a central kitchen and would be transported to elementary units. Some canned fruit items would be housed at elementary schools and served to students. We do this at the present time with the sandwich program.

**Suggested Staff and Costs**

1. 1 Cook—8 hours a day $5,226.48
2. 1 Cook's Helper—4 hours a day 5,126.48
3. 1 Dishwasher
4. 1 Driver—3 hours a day 2,911.07
5. 1 Server—Pullman 1,959.93

*Total Staff Costs* . . . . . . $15,223.96

**Capital Outlay**

1. Truck $5,000.00
2. Dry Heat Mobile Warmers 750.00
3. Pans and Covers 146.00

Start up food order—Fall 1978—Contact salesman for estimate.

**Final Committee Recommendations**

1. Implementation of a Type A Lunch program—use central kitchen concept.
2. Transport cooked items to elementary schools by van.
3. Involve business manager to develop budget and to supervise food buying. (Work with cook in this area.)
4. Establish committee made up of students, parents, and administrators to evaluate the new program and make suggestions concerning menu items.
5. Make chocolate milk available to students who want it. Some have said they would pay 1¢ more for chocolate milk if costs are higher from dairy.
Appendix C

Special Programs' Budget Updates
## CHAPTER III BUDGET UPDATE

<table>
<thead>
<tr>
<th>Category</th>
<th>Budgeted</th>
<th>Spent/Encum.</th>
<th>Balance</th>
</tr>
</thead>
<tbody>
<tr>
<td>Teacher &amp; 2-1/2 Aides</td>
<td>$20,700.00</td>
<td>$20,722.24</td>
<td>($22.24)</td>
</tr>
<tr>
<td>Teaching Aids &amp; Supplies</td>
<td>738.00</td>
<td>586.56</td>
<td>151.44</td>
</tr>
<tr>
<td>Employee Benefits</td>
<td>4,600.00</td>
<td>2,727.13</td>
<td>1,872.87</td>
</tr>
<tr>
<td>Instruction Improv.</td>
<td>300.00</td>
<td>65.71</td>
<td>234.29</td>
</tr>
<tr>
<td>Director Salary</td>
<td>500.00</td>
<td>500.00</td>
<td>--</td>
</tr>
<tr>
<td>Director Fringe</td>
<td>80.00</td>
<td>25.00</td>
<td>55.00</td>
</tr>
<tr>
<td>Operation &amp; Maint.</td>
<td>3,003.00</td>
<td>3,131.44</td>
<td>(128.44)</td>
</tr>
<tr>
<td>Bus Parts</td>
<td>348.00</td>
<td>348.00</td>
<td>--</td>
</tr>
<tr>
<td>Testing &amp; Research</td>
<td>800.00</td>
<td>414.55</td>
<td>385.45</td>
</tr>
<tr>
<td>Parent Council</td>
<td>200.00</td>
<td>--</td>
<td>200.00</td>
</tr>
<tr>
<td>Indirect Costs</td>
<td>351.00</td>
<td>360.46</td>
<td>(9.46)</td>
</tr>
<tr>
<td>Capital Outlay</td>
<td>130.00</td>
<td>128.70</td>
<td>1.30</td>
</tr>
<tr>
<td><strong>Totals</strong></td>
<td>$31,750.00</td>
<td>$29,009.79</td>
<td>$2,740.21</td>
</tr>
</tbody>
</table>

Reproduced with permission of the copyright owner. Further reproduction prohibited without permission.
## TITLE I BUDGET UPDATE

<table>
<thead>
<tr>
<th>Account</th>
<th>Budgeted</th>
<th>Spent/Encum.</th>
<th>Balance</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Instruction</strong></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>125-1248 Teacher Salaries and Aides</td>
<td>$69,426.00</td>
<td>$45,282.31</td>
<td>$24,143.69</td>
</tr>
<tr>
<td>125-5128 Teach. Supplies</td>
<td>9,011.00</td>
<td>4,810.97</td>
<td>2,917.61</td>
</tr>
<tr>
<td><strong>Emp. Benefits</strong></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>125-2828 Retirement--T-I teachers, aides, subs + State Serv. charge</td>
<td>10,654.00</td>
<td>6,590.47</td>
<td>4,063.53</td>
</tr>
<tr>
<td>125-2138 Insurance--T-I teachers</td>
<td>4,400.00</td>
<td>1,523.04</td>
<td>2,876.96</td>
</tr>
<tr>
<td><strong>Supporting Services</strong></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>213-3138 Title I Health Services</td>
<td>300.00</td>
<td>70.00</td>
<td>230.00</td>
</tr>
<tr>
<td>226-3218 Dir. &amp; Teacher Mileage &amp; Conf. Title I</td>
<td>1,300.00</td>
<td>146.59</td>
<td>1,153.41</td>
</tr>
<tr>
<td>226-1178 Salary--Dir. T-I</td>
<td>18,000.00</td>
<td>10,666.63</td>
<td>7,333.37</td>
</tr>
<tr>
<td>231-3188 Audit--T-I</td>
<td>400.00</td>
<td>400.00</td>
<td>--</td>
</tr>
<tr>
<td>262-3218 Testing T-I</td>
<td>500.00</td>
<td>418.72</td>
<td>81.28</td>
</tr>
<tr>
<td><strong>Emp. Benefits--Supporting</strong></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>226-2138 Insurance T-I Dir.</td>
<td>1,286.00</td>
<td>633.00</td>
<td>653.00</td>
</tr>
<tr>
<td>226-2828 Retirement T-I Director</td>
<td>3,325.00</td>
<td>1,738.85</td>
<td>1,586.15</td>
</tr>
<tr>
<td><strong>Community Services</strong></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>330-4908 Parent Advisory Council--T-I</td>
<td>300.00</td>
<td>--</td>
<td>300.00</td>
</tr>
<tr>
<td>330-5988 Parent Adv. Coun. Supplies</td>
<td>100.00</td>
<td>.52</td>
<td>99.48</td>
</tr>
<tr>
<td>Account</td>
<td>Budgeted</td>
<td>Spent/Encum.</td>
<td>Balance</td>
</tr>
<tr>
<td>---------------</td>
<td>----------</td>
<td>--------------</td>
<td>---------</td>
</tr>
<tr>
<td>Capital Outlay</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>125-6418 I</td>
<td>$ 240.00</td>
<td>$ 229.00</td>
<td>$ 11.00</td>
</tr>
<tr>
<td>125-6418 S</td>
<td>3,970.00</td>
<td>4,032.55</td>
<td>(62.55)</td>
</tr>
<tr>
<td>Totals</td>
<td>$126,492.00</td>
<td>$78,049.33</td>
<td>$48,442.67</td>
</tr>
</tbody>
</table>
### TITLE I-B BUDGET UPDATE

<table>
<thead>
<tr>
<th>Account</th>
<th>Budgeted</th>
<th>Spent/Encum.</th>
<th>Balance</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>221 Salaries</strong></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Subs</td>
<td>$ 570.00</td>
<td>$ --</td>
<td>$ 570.00</td>
</tr>
<tr>
<td>Purch. Services</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Workshops</td>
<td>760.00</td>
<td>--</td>
<td></td>
</tr>
<tr>
<td>Tuition</td>
<td>1,900.00</td>
<td>2,782.63</td>
<td>977.37</td>
</tr>
<tr>
<td>Consultants</td>
<td>1,100.00</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>$3,760.00</td>
</tr>
<tr>
<td><strong>Materials</strong></td>
<td>1,000.00</td>
<td>863.31</td>
<td>136.69</td>
</tr>
<tr>
<td><strong>Supplies</strong></td>
<td>700.00</td>
<td>283.14</td>
<td>416.86</td>
</tr>
<tr>
<td><strong>226 Supervis. &amp; Direction</strong></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Dir. Salary</td>
<td>1,000.00</td>
<td>500.00</td>
<td>500.00</td>
</tr>
<tr>
<td>Prof. Books</td>
<td>300.00</td>
<td>--</td>
<td>300.00</td>
</tr>
<tr>
<td><strong>297 Employee Benefits</strong></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Insurance</td>
<td>13.00</td>
<td>20.00</td>
<td>( 7.00)</td>
</tr>
<tr>
<td>State Serv. Chg.</td>
<td>154.00</td>
<td>110.00</td>
<td>44.00</td>
</tr>
<tr>
<td>Retirement</td>
<td>79.00</td>
<td>50.00</td>
<td>29.00</td>
</tr>
<tr>
<td>Indirect Costs</td>
<td>86.00</td>
<td>86.00</td>
<td>--</td>
</tr>
<tr>
<td>Capital Outlay</td>
<td>786.00</td>
<td>736.00</td>
<td>50.00</td>
</tr>
<tr>
<td><strong>Totals</strong></td>
<td>$8,448.00</td>
<td>$5,431.08</td>
<td>$3,016.92</td>
</tr>
</tbody>
</table>
BIBLIOGRAPHY

