A Report of an Internship at Portage Public Schools

Mary A. Groening

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A REPORT OF AN INTERNSHIP AT
PORTAGE PUBLIC SCHOOLS

by

Mary A. Groening

A Project Report
Submitted to the
Faculty of the Graduate College
in partial fulfillment
of the
Degree of Specialist in Education

Western Michigan University
Kalamazoo, Michigan
December 1979
ACKNOWLEDGEMENTS

There are a number of individuals whom I would like to thank for their support and encouragement during my field experience. I would like to thank Mr. Henry Houseman, my site supervisor, for providing me the opportunity to become involved in a number of valuable activities. Also, I would like to express my gratitude to the other administrators at Portage Public Schools who were willing to share their time and knowledge with me. Very special thanks are due Dr. Carol Sheffer, my advisor. Her guidance and inspiration throughout my program at Western Michigan University have been greatly appreciated.

Mary Alice Groening
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CHAPTER I

INTRODUCTION

The purpose of this internship was to gain experience which could further the student's career goals. It seemed reasonable that if the site were chosen carefully and the activities were designed with the intern's goals in mind, the field experience could be a valuable one. The primary objectives of the internship were to provide exposure to areas or activities with which the intern had little contact and to provide opportunities to apply knowledge gained to academic settings.

The career goals of the intern included both building level administration and central office administration focusing on curriculum development at that level. Therefore, the field experience was structured to provide exposure to building level activities as well as to central office activities, particularly in the area of curriculum.

The selection of the site for this experience was limited by several factors. The intern was able to become involved in a field placement only during the summer. For this reason, the site selected had to be a school system that planned to offer a summer school program. Also, because the intern wished to increase knowledge of central office activities, it was desirable to chose a school system with a large and varied central office administrative staff, most of whom worked during the summer.
The Portage School System was chosen for the internship because it met all of the requirements of the intern and because there were individuals within the system willing to work with an intern. The Portage School System had a large central office administrative staff, and also operated a summer school program administered by the Community Schools Coordinator.

Portage Schools were formed in 1922 when several small rural school districts consolidated to form Portage Agricultural School District. Then, in 1946, the district further expanded and became the Portage Township Schools. At that time, there were approximately 1,000 students and 40 teachers comprising the system. In the 1950's, enrollment began to increase rapidly as the population of the suburban area of Portage grew. In 1962, the Village of Portage was incorporated into a city. The school system then became Portage Public Schools.

At the time of the internship, the Portage Public School District comprised approximately 45 square miles. Most of this area was within the City of Portage, although portions were in surrounding townships. The Portage School System had nearly 10,000 students and almost 1,000 employees, including a teaching staff of about 540. There were 11 elementary schools, three junior high schools and two high schools.

A seven-member elected board governed the school system. Board members served four-year terms on a staggered basis. The board was
responsible for making policies relative to the operation of the dis­
trict and they appointed a superintendent to direct the day-to-day
operation of the schools.

Because of the size of the system, Portage had a large adminis­
trative staff. On the building level, there were 11 elementary
principals, three junior high school principals, three junior high
assistant principals, two high school principals, and two high school
assistant principals.

At the central office level, the major administrative positions
were: the Superintendent of Schools, the Assistant Superintendent
for Non-Instructional Areas, the Administrative Assistant to the
Superintendent, the Director of Elementary Education, the Director
of Secondary Education, the Director of A-V and Library Services,
the Director of Special Education, the Director of Curriculum, the
Director of Vocational Education, the Employee Relations Director,
the Business Manager, the Community Schools Coordinator, the Super­
visor of Transportation and the Supervisor of Food Services.

The 1979 summer school in Portage was a secondary program for
junior and senior high school students. Classes were offered four
days a week for six weeks from 7:30 a.m. to 12:30 p.m. Tuition
was charged for classes and students from any school district could
register for the program. Because this was the only summer school
program in the Kalamazoo area in the summer of 1979, the enrollment
was comparatively large, numbering approximately 400.
The internship experience was scheduled to include the summer school program in the morning and contact with a variety of central office administrators in the afternoon. The site supervisor was Mr. Henry Houseman, Community School Coordinator. This individual was in charge of the summer school program, as well as the Adult High School and community enrichment classes. He helped make arrangements for the intern to meet with a number of other central office administrators and to work with the Director of Curriculum and the Business Manager.

Before making final arrangements for the internship, the intern developed a prospectus that was designed to identify the experiences and knowledge which seemed to be beneficial to career development. To the extent possible, the internship experiences were planned with the site supervisor in the initial stages of the internship. A copy of the prospectus follows. Substantive comments regarding the degree to which the activities anticipated in the prospectus were experienced are included in the body of this report.
MAJOR INTERNSHIP - PROSPECTUS

SPONSORING ORGANIZATION: Portage Public Schools

FIELD SUPERVISOR: Mr. Henry Houseman
                     Director of Community Education
                     Portage Public Schools

ADVISOR: Dr. Carol Sheffer, Western Michigan University

MAJOR FOCUS OF EXPERIENCE: Familiarization with administrative roles within the school system

DURATION: 240 hours, commencing June 11, 1979

RATIONALE:

Administration of a school system is a complex and demanding task. As school systems increase in size, the number of administrative positions may also increase. The Superintendent is the chief executive officer of the system. Other central office positions might include business manager, curriculum director, personnel director and others. At the building level, administrative positions include principal and in some cases, assistant principal.

In order to increase understanding of the various administrative roles in a school system, this internship experience was structured to provide exposure to a number of different administrative positions both at the central office level and at the building level.
### PROJECTED NATURE OF INTERNSHIP EXPERIENCE

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<th>TERMINAL SKILLS</th>
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<tr>
<td>A. CONCEPTUAL</td>
<td>The intern will -</td>
<td>The intern will be able to -</td>
</tr>
<tr>
<td>1. To become familiar with the administrative structure of a school system.</td>
<td>obtain and examine the organizational chart of Portage Public School.</td>
<td>outline the administrative structure of Portage Public Schools.</td>
</tr>
<tr>
<td>2. To understand the responsibilities of major administrators in the school system.</td>
<td>examine the organizational chart; interview various administrators about the responsibilities of those listed on the chart.</td>
<td>list and identify the roles of central office administrators listed on the organizational chart.</td>
</tr>
<tr>
<td>OBJECTIVES</td>
<td>EXPERIENCES AND CONTACTS</td>
<td>TERMINAL SKILLS</td>
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<tr>
<td>3. To <strong>analyze</strong> the</td>
<td><strong>review</strong> literature concerning these jobs; <strong>interview</strong> individuals holding these positions in Portage Public Schools; <strong>observe</strong> these administrators at work; <strong>assist</strong> them in various tasks.</td>
<td><strong>describe</strong> in detail the jobs of superintendent, curriculum director, director of secondary education, director of elementary education, business manager, community education coordinator and building principal.</td>
</tr>
<tr>
<td>jobs of superintendent,</td>
<td></td>
<td></td>
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<tr>
<td>curriculum director,</td>
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<td>director of secondary</td>
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<td>education,</td>
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<td>director of elementary</td>
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<td>education,</td>
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<td></td>
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<tr>
<td>business manager,</td>
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<tr>
<td>community education</td>
<td></td>
<td></td>
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<tr>
<td>coordinator and building</td>
<td></td>
<td></td>
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<tr>
<td>principal.</td>
<td></td>
<td></td>
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<tr>
<td>4. To <strong>become aware</strong> of</td>
<td><strong>interview</strong> individuals in administrative positions; <strong>observe</strong> the individuals at work.</td>
<td><strong>discuss</strong> types of problems encountered by each of the administrators listed.</td>
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<tr>
<td>sources of administrative</td>
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<td>positions for these</td>
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<td>administrators.</td>
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<tr>
<td>OBJECTIVES</td>
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</tr>
<tr>
<td><strong>B. HUMAN</strong></td>
<td>The intern will -</td>
<td>The intern will be able to -</td>
</tr>
<tr>
<td>1. To become familiar with the background and experience of selected administrators.</td>
<td>interview administrators as to their background and experience.</td>
<td>describe the background and experience of selected administrators.</td>
</tr>
<tr>
<td>2. To identify different styles of management.</td>
<td>observe selected administrators in various settings; engage these individuals in conversation; keep notes on behavior observed.</td>
<td>discuss different management styles observed.</td>
</tr>
<tr>
<td>3. To gain an understanding of what characteristics are most valuable in management.</td>
<td>compare and contrast different ways of dealing with situations; analyze behavior; develop a description of effectiveness.</td>
<td>identify important skills for effective administrators.</td>
</tr>
<tr>
<td>OBJECTIVES</td>
<td>EXPERIENCES AND CONTACTS</td>
<td>TERMINAL SKILLS</td>
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<tr>
<td>C. TECHNICAL</td>
<td>The intern will -</td>
<td>The intern will be able to -</td>
</tr>
<tr>
<td>1. To gain experience in performing routine administrative tasks required of a principal.</td>
<td>act as building principal for summer school; perform routine administrative tasks required.</td>
<td>list and discuss some routine tasks performed by a principal.</td>
</tr>
<tr>
<td>2. To develop increased proficiency in program development.</td>
<td>participate in planning a new Adult High School program; discuss program development with various administrators.</td>
<td>demonstrate an awareness of the process of program development.</td>
</tr>
<tr>
<td>3. To comprehend the process of organizing a course for teachers within the school setting.</td>
<td>discuss the course with administrators in charge; read file information about previous courses; contact participants; perform organizational tasks required.</td>
<td>point to communications and information produced concerning the course; discuss steps performed.</td>
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CHAPTER II

THE INTERNSHIP EXPERIENCE

Introduction

The career goals of the intern included both building level administration and central office administration. Therefore, the internship experience was designed so that mornings would be spent working with the summer school program and afternoons would be spent working with and observing various central office administrators, making exposure to both levels possible.

A description of the activities pursued follows. The description has been divided into three sections. The first section deals with those activities which involved interviewing and observing central office administrators. These administrators were interviewed and observed in order to meet the following objectives: becoming familiar with the responsibilities of selected administrators; identifying problems encountered in the jobs of these administrators; analyzing the personal styles of selected administrators.

The second section deals with various projects with which the intern was involved. These projects allowed the intern to gain practical experience and meet the technical objectives listed in the prospectus. These objectives were: to develop increased proficiency in program development; to comprehend the process of organizing a course for teachers within the school setting.
The final section contains a description of the summer school program and the activities engaged in by the intern in this setting. These activities were designed to meet the objective of gaining experience in performing routine administrative tasks required of a building principal.
Description of Selected Administrators

Introduction

The conceptual objectives of the intern were that the intern become familiar with the administrative structure of a school system and analyze certain positions within this structure as to tasks performed and problems encountered. The human objectives were that the intern analyze the management style of various individuals in order to identify important characteristics for successful administrators. The following section is a description of the results of activities which included interviewing and observing administrators in order to meet these conceptual and human objectives.

The organizational chart of Portage Public Schools is included to provide an understanding of the relationship between and among the various administrative officers. The Superintendent of Schools reported directly to the Board of Education. Reporting directly to the Superintendent were the Director of Elementary Education, the Director of Secondary Education, the Director of Curriculum, the Director of Special Education, the Director of Vocational Education, the Director of A-V and Library Services, the Employee Relations Director, the Administrative Assistant, the Business Manager and the Assistant Superintendent for Non-Instructional Areas. Elementary principals reported to the Director of Elementary Education. Secondary principals reported to the Director of Secondary Education. The Community School Coordinator reported to the Administrative Assistant.
The Supervisor of Transportation and the Supervisor of Food Services reported to the Assistant Superintendent for Non-Instructional Areas.

A number of administrators were interviewed and observed in order to provide detailed information concerning the jobs and management styles of these individuals. Those selected for study were the Superintendent, the Director of Secondary Education, the Director of Curriculum, the Employee Relations Director, the Administrative Assistant, the Community School Coordinator and the Business Manager. Selection was based on relevance of the position to the intern's career goals and availability of the administrator for interviews and observations.

The description of each of these administrators contains a discussion of the tasks, responsibilities and problems associated with the position. Most of this information is based on interviews with the administrator in question. Also, a description of the administrator's background is included and an analysis of the administrator's management style is provided.
Superintendent of Schools

Tasks and responsibilities

In Michigan school systems, the Superintendent is the chief executive officer. He is hired by Boards of Education to carry out organizational policies and is directly responsible to the Board. It seemed to the intern that the Portage Public Schools operated consistently with organizational literature in that the Board of Education was the policy-making body and the Superintendent implemented and administered the policies approved by the Board.

Based on interviews with the Superintendent and observations of his activities, tasks performed could be divided into two types: those involving internal administration and those involving public relations.

Tasks related to internal administration included providing or preparing reports for the Board of Education, preparing agendas for Board meetings, dealing with citizen complaints or questions, interviewing administrative job candidates and dealing with grievances of employees. Also, the Superintendent reported that while he did not become directly involved in contract negotiations, he was on call to advise the negotiating team whenever they were meeting.

In order to keep informed concerning the activities of his staff, the Superintendent held weekly meetings with those that reported directly to him. He was also observed to spend considerable time in informal meetings with staff members.
In regard to public relations, the Superintendent was involved in a number of community activities as a representative of the school system. He served on the board of directors of the Chamber of Commerce. He also was on the board of directors of a local hospital.

The Superintendent reported that he considered it his responsibility to keep informed concerning current issues which might affect the school system. This included political issues, current legal findings and educational trends. He stated that he spent a good deal of time reading about and discussing these topics with other administrators.

Problems reported by the Superintendent included dealing with citizen complaints and union demands. There appeared to be an increase in lawsuits against the system and dealing with these took up much of his time. Also, because of the increased power of employees' unions, contract negotiations and grievances were increasingly a problem.

Background

This Superintendent's career background was almost entirely in educational organizations. He began as a classroom teacher, became a counselor, guidance director, assistant principal, principal and assistant superintendent before taking the position of Superintendent of Schools. He had been in the educational field for many years, first in Ohio and ultimately in Michigan.
Analysis of management style

In terms of management style, the Superintendent seemed to be a warm, friendly individual. He was observed to be polite and considerate of others on his staff and his staff members spoke highly of him. His interaction with other administrators in informal situations seemed to be relaxed and friendly. His staff appeared to be comfortable in his presence.

This administrator fit the description of a leader which defines a leader as "the individual in the group who has the task of directing and coordinating task-relevant group activities" (Fiedler & Clemens, 1974, p. 363). He also fit McGregor's definition of a "Theory Y" leader, meaning that he saw his employees as self-motivated, dedicated and capable (Sergiovanni & Starratt, 1971, p. 77). The Superintendent expressed a belief in delegation of authority to others. Many of his staff members also mentioned this characteristic. The Superintendent's attitude appeared to be that his subordinates were hired to do a job and were capable of doing it without his help. He reported that he wished to know what his staff members were doing but did not want to have to direct their activities. He was quoted as saying, "If I have to make a decision for you, I don't need you."

This individual's style of management was participatory, as defined by Gibb (Sergiovanni & Starratt, 1971, p. 87) because he allowed others on his staff to share in the decision-making process. He was close to a 9,9 on the Blake-Mouton grid (Sergiovanni & Starratt,
1971, p. 92) and would fit Halpin's Quadrant 4 (Sergiovanni & Starratt, 1971, p. 90) because he placed strong emphasis on both task accomplishment and morale of employees.

In terms of power, as defined by French and Raven (1977), the Superintendent had reward and coercive power because he could mediate rewards and punishments. He also had legitimate power based on his knowledge of education. However, he also appeared to have referent power over others. Based on observations and discussions with staff members, others looked up to him and admired him.

If the effectiveness of the Superintendent were judged by the efficiency of the system and the morale of the employees, then this Superintendent appeared to be effective. Most of those interviewed seemed satisfied with their job and had respect for those with whom they worked. Based on observations and discussions with administrators and teachers, the school system appeared to run efficiently. Therefore, this administrator was classified as successful.
**Administrative Assistant**

Tasks and responsibilities

The Administrative Assistant was responsible for all public relations in the district including press releases, news stories and newsletters. He ran the millage campaigns and school elections. This administrator was the secretary for the Board of Education, handling minutes of meetings and all correspondence. He also was in charge of the United Fund Drive. Another responsibility of the Administrative Assistant involved assuming the duties of the Superintendent in his absence.

The major problem reported by the Administrative Assistant was a lack of sufficient time to do everything required of him. He stated that his duties as board secretary were especially demanding, requiring a great deal of time to prepare for meetings and to complete minutes and handle correspondence. Also, he reported that the Superintendent delegated many additional tasks to him in excess of those mentioned, adding to the demands on his time.

Background

This individual had held the position of Administrative Assistant for about 17 years. He began his career as part of a family business. He then went back to school to become a teacher, eventually holding the position of assistant principal, then community school coordinator and finally administrative assistant. This individual expressed enthusiasm for his job and for the school system. He reported enjoying...
the variety and challenge of his job. He stated that he had no desire to become a superintendent because he enjoyed being behind the scenes instead of in a visible position. As a long-standing member of the community, he knew many influential people and seemed to enjoy political activities. He related how he had pulled strings to bring about the appointment of the Superintendent to the board of directors of the Chamber of Commerce and how he had sold the idea of a summer tax collection to the City Council. He stated that he might consider a different career in a few years, but at present, had no desire to change jobs.

Analysis of management style

In terms of personal style, the Administrative Assistant appeared to be less of a "Theory Y" manager than the Superintendent, because he tended to supervise activities of subordinates more closely. However, he did not seem to distrust subordinates or feel they had to be watched, so would not qualify as a "Theory X" manager either (Sergiovanni & Starratt, 1971, p. 77). It seemed likely, based on observations, that his style of supervision was not participatory, but rather was authoritarian as defined by Gibb (Sergiovanni & Starratt, 1971, p. 87).

The Administrative Assistant seemed to be more task-oriented than people-oriented. On the Blake-Mouton grid (Sergiovanni & Starratt, 1971, p. 92) the intern rated him as a 7,5, meaning that although not inconsiderate of people, he considered them less important than the tasks required of his job.
In terms of power, this administrator had legitimate power based on his position in the organization. However, much of his power was expert power (French & Raven, 1977). This individual stated that he knew many influential people in the community and was able to use these connections for the benefit of the school system. He also was responsible for carrying out many important tasks within the organization. The placement of this position on the organizational chart did not give an accurate picture of the power of the position. Clues to his actual power included the size and location of his office, next to that of the Superintendent, the fact that he had one and one-half secretaries, sharing one with the Superintendent and the fact that he was in charge in the absence of the Superintendent.

The intern rated the Administrative Assistant as an effective administrator in terms of the efficiency with which his department appeared to operate. This opinion was based on observations and discussions with other administrators.
Director of Secondary Education

Tasks and responsibilities

The Director of Secondary Education had line authority over all the secondary principals including both Junior High School principals and Senior High School principals. Some of his responsibilities included overseeing the staffing of buildings, handling grievances, evaluating the principals, arranging administrative staff meetings and in-service, overseeing student policies such as attendance and suspension to make sure that they were uniform throughout the district and running the Outdoor Education Center which Portage Public Schools were developing.

The most difficult problems that this individual reported were related to staffing. Due to declining enrollment, staff reduction was necessary. However, the Board of Education did not wish to lay off teachers if this could be avoided. Therefore, the Director of Secondary Education had to consult with principals concerning staff reductions and work with the personnel department to reassign those staff members whose positions had been cut. This was difficult at the secondary level because secondary teachers' certifications were very specific and it was difficult to reassign all those displaced.

Background

This individual had been in the position of Director of Secondary Education from the time it was created. He began as a teacher in Gobles, taught at both the Junior High and Senior High levels and
came to Portage as a principal. He later was appointed Director of Secondary Education. This individual reported that he would probably continue in this position until he retired. He expressed satisfaction with his job, and had no desire to try a different position.

Analysis of management style

The Director of Secondary Education appeared to be a quiet, serious person. He did not engage in friendly banter which went on between other administrators and seemed rather conservative in outlook. Based on observations and interviews, he fit the definition of a "Theory Y" manager (Sergiovanni & Starratt, 1971, p.87). It appeared that he believed that people were more important than task completion. For example, in discussing the fact that principals were going to be required to work an extra week, he expressed concern for their morale and stated that the extra week was added at the beginning of the next year instead of at the end of the previous school year in hopes of making the adjustment easier for them. The intern would rate this individual as a 5,7 on the Blake-Mouton grid (Sergiovanni & Starratt, 1971, p. 92) because he would put people ahead of the task.

The Director of Secondary Education had reward and coercive power, as well as legitimate power. It seemed likely that this individual also had expert power over his subordinates based on the respect that others reported to have for him (French & Raven, 1977).

In terms of effectiveness, the Director of Secondary Education apparently managed his subordinates efficiently and morale was reported to be high. Therefore, he was classified as an effective administrator.
Director of Elementary Education

Tasks and responsibilities

The responsibilities of the Director of Elementary Education were similar to those of the Director of Secondary Education. This person was the line supervisor over the elementary principals and was responsible for evaluating them. He also worked on staffing the schools, planned administrative staff meetings, handled grievances beyond the building level and in general oversaw the operation of the elementary schools. In addition, this individual was in charge of the federal American Indian Program and was part of the negotiating team for the school district.

This administrator reported that his major problem was to get his principals to honestly evaluate teachers. He believed that they had a tendency to be too nice when evaluating teachers and were not specific enough about improvements that needed to be made. He stated that he tried to be completely honest when evaluating principals and wanted to encourage them to do the same with their staff.

Background

This individual had been with Portage Public Schools since the beginning of his career, with the exception of approximately two years, when he worked with the Job Corp as a principal. He began in Portage as a teacher and worked as an elementary principal, secondary principal and finally was appointed Director of Elementary Education. He reported enjoying his job and liking the people he worked with.
Analysis of management style

The Director of Elementary Education appeared to be a warm and friendly individual. He seemed to enjoy people and to be well-liked by other administrators. He reported that he participated in social events with the elementary principals and that they were a close-knit group.

In the intern's opinion, he was a "Theory Y" manager, based on his positive statements about those who worked for him (Sergiovanni & Starratt, 1971, p. 77). He probably favored a participatory management style (Sergiovanni & Starratt, 1971, p. 87). He rated high in both consideration and in initiating structure (Sergiovanni & Starratt, 1971, p. 89) because he stated that he believed that people should be treated with respect without interfering with task accomplishment.

On the Blake-Mouton grid, the intern rated him about 9,9 because he was quite task-oriented as well as considerate toward people that worked for him (Sergiovanni & Starratt, 1971, p. 92).

This individual seemed to have not only reward, coercive and legitimate power, but referent power as well (French & Raven, 1977). This opinion was based on the fact that he was a member of the negotiating team and appeared to enjoy good relations not only with other administrators, but with those who worked for him as well. He was reportedly respected by all those with whom the intern spoke.

The Director of Elementary Education appeared to be an effective administrator. Administrators who worked with him appeared to have a high opinion of his abilities and morale of his subordinates was good.


Director of Curriculum

Tasks and responsibilities

Responsibilities of the Director of Curriculum included setting up and coordinating curriculum review and study committees, approving changes in curriculum content and materials, seeing that book orders were placed, making sure that there was citizen input into curriculum changes, supervising the person in charge of testing and research and supervising the person in charge of career education.

This administrator expressed a great deal of frustration with his position in the school system. As Director of Curriculum, he had no line authority over those with whom he had to work. It was necessary for him to rely on good will and persuasion to get any changes made or new programs implemented. He stated that this would be a major problem for anyone holding this position.

Background

This individual had been a part of education throughout his career, acting as a classroom teacher, assistant principal and personnel worker prior to becoming Director of Curriculum for Portage Public Schools. He did express a desire to become a superintendent of schools in the future.

Analysis of management style

The management style of this administrator appeared to be warm, friendly and easy-going. The intern classified him as a "Theory Y" manager (Sergiovanni & Starratt, 1971, p. 77). He was observed while
meeting with a committee planning an inservice and he acted mainly as a facilitator. He also stated a preference for participatory management (Sergiovanni & Starratt, 1971, p. 87) although he wished to have the final decision. He expressed a belief in the ability of others to carry out their jobs without interference and a belief in delegation of authority. He was observed to treat subordinates with respect and seemed to be highly task-oriented while not considering people as unimportant. For that reason, he rated high in both initiating structure and consideration (Sergiovanni & Starratt, 1971, p. 89) and fell at about the 8,7 quadrant of the Blake-Mouton grid (Sergiovanni & Starratt, 1971, p. 92).

The main sources of power of this administrator were referent and expert power (French & Raven, 1977). He appeared to be highly respected by both other administrators and by teaching and clerical staff members. His knowledge of curriculum matters seemed to be extensive and he reportedly worked well with people. For this reason, he was able to carry out many program changes and innovations. Organizationally however, he had little power because of the nature of his job. He had no reward or coercive power except over his few subordinates.

The Director of Curriculum was an effective administrator. This judgment was based on the fact that he was able to implement many curriculum changes in the system and appeared to have the respect of those who worked with him.
Business Manager

Tasks and responsibilities

The Business Manager of Portage Public Schools was responsible for preparing and administering the budget, purchasing supplies and materials, preparing payroll, purchasing insurance and overseeing all financial aspects of the school system. The business office had the largest staff of any of the central office divisions, with a half-time secretary, two bookkeepers, two payroll clerks and a purchasing clerk, as well as an assistant business manager.

Problems reported by the Business Manager were related to the fact that expenditures exceeded revenue and cutbacks had to be made in order to balance the budget. Other problems of this position occurred as a result of the differing philosophies within the school system. Because of a business background, the Business Manager believed that decisions should be based on financial grounds, whereas, according to him, most educators believed that the good of students should come first. Athletics were another source of problems because coaches often were dissatisfied with what he purchased for them. They tended to request particular brands of equipment and he frequently substituted comparable but less expensive brands. Also, he stated that in some instances his opinion concerning spending priorities was at odds with opinions of others in the system.

Background

The Business Manager had held this position for ten years. He received his M.B.A. from Michigan State University and then came to
work for Portage Public Schools. He had no educational training at that time, but after taking the position, went back to school and acquired a teaching certificate. He believed that this training would be useful in working with educators as it might help him understand their perspective.

Analysis of management style

This administrator expressed a belief in delegation of authority. He was classified as a "Theory Y" manager (Sergiovanni & Starratt, 1971, p. 77). He appeared to be task oriented but also spoke of concern for his employees. Therefore, the intern rated him about a 9,5 on the Blake-Mouton grid (Sergiovanni & Starratt, 1971, p. 92). He rated high on initiating structure and high on consideration (Sergiovanni & Starratt, 1971, p. 89) based on his own statements and observations of him in action.

Among his peers, he appeared to be respected but not extremely popular. Because he tended to place financial considerations first, he reportedly had come into conflict with others on the staff. He did have power in the system, although he did not have a line administrative position. Some of this power was legitimate power, or power of position but a great deal was based upon expertise in financial matters. He also had some coercive power due to his role as financial overseer of the district (French & Raven, 1977). He instituted the practice of responsibility budgeting which meant that each building or administrative unit had its own budget and was responsible for staying within it.
The accounting system was computerized and it was easy for him to de-
terminate whether or not each unit stayed within the budget.

The Business Manager was classified as an effective administrator. His department appeared to operate efficiently and although morale did not seem to be high, no extremely negative attitudes were apparent either.
Employee Relations Director

Tasks and responsibilities

The Employee Relations Director was in charge of all personnel matters such as interviewing job applicants, acting as chief negotiator for contracts, hiring new employees, handling worker's compensation and insurance claims, working on staff assignments and answering questions of employees about working conditions, hours, compensation and other such matters. The Director had two secretaries, one half-time assistant and a summer assistant.

Background

This individual had been in the position of Employee Relations Director for a number of years. He originally worked in a personnel department in industry before coming to Portage Public Schools. He expressed a degree of satisfaction with his job but indicated that he would change jobs if he did not have to consider security.

Analysis of management style

This individual appeared to be respected by his peers, but did not seem to be particularly popular. He did not usually join in friendly conversation with other administrators and seemed rather withdrawn when observed in informal situations. He also expressed a negative opinion of teachers as a group. He stated that they had little common sense and didn't seem to be able to do such simple things as fill out forms.

The intern classified him as a "Theory X" manager (Sergiovanni & Starratt, 1971, p. 77). Based on observations, it appeared likely
that he would not use participatory management but would favor an authoritarian approach (Sergiovanni & Starratt, 1971, p. 87). On the Blake-Mouton grid, he was rated about 7.3. In the intern's opinion, he would consider the task more important than morale (Sergiovanni & Starratt, 1971, p. 92). Most of his power was legitimate power, although he had some coercive and reward power due to his involvement in contract negotiations (French & Raven, 1977).

In terms of morale within his department, the Employee Relations Director would not be rated as very effective. This opinion was based on discussions with those who worked with him. However, in terms of efficient operation of his department, he appeared to be fairly effective. Tasks required of the personnel department appeared to be accomplished and contract negotiations, although reportedly not as amicable as in the past, had been successfully completed.
Community School Coordinator

Tasks and responsibilities

The Community School Coordinator reported to the Administrative Assistant and was responsible for the Adult High School, the summer school program and community enrichment classes. The coordination of community enrichment classes was delegated to his assistant and he directly coordinated the summer school program and the Adult High School. He was responsible for hiring staff, ordering supplies and teaching materials, arranging facilities, determining course offerings, scheduling classes, arranging for publicity and overseeing enrollment.

Portage Public Schools in 1979 became associated with Comstock Public Schools in a joint Adult High School program. The rationale for the experiment was that Portage Schools still received state aid assistance, whereas Comstock Schools did not. Portage Public Schools administered the program with the assistance of the Community Education Director of Comstock. This change enlarged the responsibilities of the Community Education Coordinator of Portage.

The major problem for this administrator appeared to be related to coordinating efforts with Comstock Public Schools' Community School Director. Problems arose due to differences in procedure used by the two systems and the different approaches of the two individuals involved.

Background

The Community School Coordinator had been with Portage Public Schools for a number of years. He worked at both the High School and
Junior High School levels as a teacher before taking this position. He reported that he enjoyed his job a great deal, and had no desire to make a change.

Analysis of management style

This administrator appeared to be a "Theory Y" manager (Sergiovanni & Starratt, 1971, p. 77) and practiced participatory management (Sergiovanni & Starratt, 1971, p. 89). He was rated higher on consideration than on task accomplishment (Sergiovanni & Starratt, 1971, p. 89). The intern rated him as a 5,9 on the Blake-Moutin grid (Sergiovanni & Starratt, 1971, p. 92) because he did not disregard the task but placed it secondary to concern for individuals. Based upon observations and personal experience, it seemed that the administrator believed in fostering an open atmosphere. He displayed confidence in subordinates and encouraged a cooperative approach to decision-making.

This administrator did not have a great deal of power within the organization. The position of Community School Coordinator was subordinate to that of the Administrative Assistant. Therefore, it is a secondary level position. However, this individual did have referent power over those who worked for him (French & Raven, 1977). He appeared to inspire a great deal of loyalty and affection in those subordinates in both the summer school program and the Adult High School.

Based on the intern's observations, he was classified as an effective administrator in terms of the efficient operation of his department and the high morale of his staff.
Summary

The preceding section contained a description of a number of central office administrators. The descriptions discussed the tasks, responsibilities and problems of these positions. Also, the background of each individual was presented and each was analyzed as to management style. Finally, each administrator was rated as to effectiveness. Effectiveness was judged in terms of task accomplishment and morale of subordinates. All those described were rated as effective to some degree.
Projects

Introduction

This section contains a description of three projects with which the intern was involved. These projects enabled the intern to gain practical experience in a number of areas and meet technical objectives listed in the prospectus.

In the first project, the intern was involved with the Community School Coordinator in planning a program to service clients of the Department of Social Services. In the second project described, the intern assisted the Curriculum Director in planning an in-service training program for teachers. The third project involved preparing a report for the Business Manager concerning projected interest earnings for the school system in 1979-1980.
Department of Social Services project

In June of 1979, Portage-Comstock Adult High School was approached by the Department of Social Services and requested to assist in implementing a new program. This program was to be modeled after a similar program in Grand Rapids aimed at improving the employability of persons receiving general assistance payments from the government. These individuals were considered chronically unemployed and it was hoped that by improving the academic skills of these clients, their chances of finding employment would be increased.

The role of Portage-Comstock Adult High School was to provide testing, academic counseling, and training for the clients referred. Course offerings included remedial reading, remedial math, preparation for the General Educational Development test and various vocational classes. The Department of Social Services had a group of 220 clients to be included in this program. These clients were required to attend testing sessions and classes.

The intern was involved in a number of planning meetings with the Community School Coordinators from Comstock and Portage and Department of Social Services personnel. In the course of these meetings, the responsibilities of those involved were clarified and a timetable for implementation was devised.

The intern was assigned several tasks as part of the planning process. The first task was to determine what public transportation was available to the clients. The testing sessions and classes were conducted at either the Comstock Community Education Building or at
Portage Central High School. Many of the individuals referred to the program did not own private transportation and had to depend on public transportation. The intern obtained bus schedules and prepared a report concerning routes to each site and times of arrival and departure. This information was then passed on to the Department of Social Services.

An additional task assigned to the intern was selection of a test to be used to determine the proper placement of clients in the program. There were a number of factors to be considered in selecting a test. First, it was decided to test only reading and math skills. Secondly, the testing sessions were limited to two hours and finally, the test selected had to be hand-scorable. After consulting with the Testing Coordinator for Portage Public Schools, the Test of Adult Basic Education, Level M, was selected.

This test was designed especially for the type of population referred by the Department of Social Services and used adult norms. Also, the results were directly related to General Educational Development Test items and could be used by instructors for remediation purposes. It was decided to administer only the reading vocabulary, comprehension, and mathematics computation sections in order to shorten testing time.

The first step in implementing the Department of Social Services program consisted of testing the clients and enrolling them in appropriate classes. During the week of August 13, 1979, clients referred by the Department of Social Services were tested. Letters were sent to these individuals by the Department giving information about the
program and specifying a time for them to report for testing. They were told to report at 8:30 a.m. for orientation. At 9:00 a.m., testing began and lasted until approximately 11:00 a.m. After tests were corrected, counselors enrolled the clients in either remedial reading and math classes or in the high school completion class. A few were enrolled in vocational classes as well.

The Department of Social Services scheduled approximately 40 clients a day for testing. However, only an average of 30% of those scheduled reported on each day. Make-up days were scheduled for those missing the original appointment. A large percentage of those tested scored below the ninth grade level in math and reading and were scheduled into remedial classes. Very few were scheduled into high school completion classes.

Classes began on September 17, 1979, and those scheduled for class were required to attend in order to receive assistance from the government. They were exempt from the program only in cases of illness or employment.

According to a Department of Social Services worker interviewed, the program in Grand Rapids had been a great success and it was hoped that the Kalamazoo program would be equally successful. However, it was noted that the legality of withholding assistance payments for failure to attend testing and/or class sessions had not been decided in court.
In-service training project

A second project was undertaken for the Director of Curriculum. This involved organizing the Remedial Gross Motor Skills Clinic to be held during July and August of 1979. In 1978, Portage Public Schools offered the Remedial Gross Motor Skills Clinics to interested teachers. These clinics were courses for credit through the Michigan State University Department of Health, Physical Education and Recreation. The courses were designed to provide teachers with skills in remediating gross motor skill problems of children, such as lack of eye-hand coordination, poor balance and difficulties with physical activities.

The first course, HPR 816, trained the teachers to diagnose gross motor skill deficiencies. The second course, HPR 818, provided experience in working with children to remediate these problems. Each teacher was assigned two children and was required to diagnose their deficiencies and plan a program of treatment for them. Under supervision, the treatment plan was carried out through a series of eight, one-hour sessions. Parents of children involved were charged a nominal fee for this program.

The HPR 816 and 818 clinics held in 1978 were reported to have been a great success. The HPR 818 clinic, held in the summer, seemed especially well-received by both parents and teachers. Because of this response, it was decided to offer both courses in the 1978-79 school year. HPR 816 was offered in the fall of 1978 and HPR 818 was scheduled for the summer of 1979.
Arrangements had been made with Michigan State University to hold the clinic from July 26 to August 8 at Portage Public Schools. Elementary principals had been contacted and asked to provide a list of students, in priority order, who could benefit from this type of program.

The intern was assigned the task of contacting teachers who might be interested in enrolling in HPR 818. Names of those enrolled in previous classes were obtained. Because HPR 816 was a prerequisite for HPR 818, only those enrolled in HPR 816 were contacted. It was decided to contact all of these individuals by letter and request that they contact the Curriculum Director of Portage Public Schools if they intended to enroll in this course. After determining how many teachers would be enrolled, it would then be possible to determine how many children could be enrolled. Using the priority lists provided by the schools, the intern would then call parents, explain the program and determine who wished to enroll children in this course.

Arrangements had been made to hold the clinic at West Junior High School by the Assistant Community Education Coordinator. Equipment needed would have to be located and final arrangements made at the school.

By July 10, however, there were only eight persons enrolled in this course. Personal contacts made by the intern resulted in no additional enrollments. Michigan State University required that a minimum of 15-20 students be enrolled in order to offer this course.
Therefore, the clinic had to be cancelled. The intern contacted all teachers who had indicated they would take the class and a letter was written to parents of children recommended for the clinic explaining why it would not be offered.

In the intern's opinion, the reason for the low enrollment was the short notice given to teachers. During HPR 816, it was announced that HPR 818 would be offered in the summer. However, until late June, no further information was sent to possible participants. Most of those contacted indicated that they had already made other plans and would have taken the class if they had been aware of the dates sooner. Perhaps information concerning the class should have been provided in May.

According to the Curriculum Director, it was doubtful that this clinic would be offered again as a class. However, the Assistant Community Schools Coordinator indicated that there was a possibility that a Remedial Gross Motor Skills Clinic for children with physical problems might be offered as part of the community enrichment classes in the winter of 1980. Several teachers who received training in 1978 had expressed an interest in holding clinics of this type.

It was the Curriculum Director's hope that somehow a remediation program for gross motor problems could be incorporated at an early level in the regular curriculum. He believed that physical problems of children had an impact on their social and emotional growth. It was his contention that remediating coordination problems could positively affect these areas as well.
Projected investment earnings project

Another project in which the intern was involved required the development of a cash flow analysis and investment earnings projection for 1979-80, done under the direction of the Assistant Business Manager. The Business Manager had estimated the earnings on investment for the proposed budget. However, it seemed desirable to have a more thorough analysis of possible earnings in order to determine the effects of the recent change in property tax collection from once a year to twice a year.

The Portage School System had a high rate of return on investments compared to other school systems in the state. In 1978-79, approximately $400,000 were earned from investment. Investments were usually in government bonds, certificates of deposit and commercial paper. Most of the investments were of a short-term nature. The summer tax collection, initiated in 1979, was proposed as a means of saving money for the school district. In previous years, because taxes were not collected until January, money had been borrowed against state aid in order to provide adequate cash flow from September to January. It was believed that a summer tax collection would not only eliminate interest expenditures for loans but might also result in more earnings from investment.

As a part of the preparation of this report, the intern studied the various revenue sources, becoming familiar with millage, the new rollback formula which resulted from the passage of the Headlee Amendment, the basic state aid formula and the declining enrollment...
formula. It was also necessary to become familiar with the proposed budget. The process of reconciling the budget and adjusting the figures for presentation to the School Board was observed. Once the figures for the proposed budget were finalized, the cash flow analysis was prepared.

The first step in preparing this analysis was to break expenditures and revenue into monthly figures. Once this was completed, weekly balances were obtained and estimated interest earnings could be determined. Three different projections were made using weekly, monthly and annual figures. Although different projections were obtained using each method, the differences were not great. However, all of the projections in the report were considerably lower than the rough estimate included in the budget by the Business Manager. The intern projected $308,000, $316,000 and $318,000 whereas the budgeted amount was $400,000. Consultation with the school district's investment consultant resulted in support for the lower figures due to a projected drop in interest rates in 1980. (see Appendix B)
Conclusion

This section of Chapter II contained a description of three projects with which the intern was involved during the summer of 1979. These projects provided exposure to areas of school administration with which the intern had little experience. Practical experience was gained in a number of areas, meeting technical objectives stated in the prospectus.
The Summer School Program

Introduction

The final section of Chapter II contains a description of the summer school program offered by Portage Public Schools in 1979. It also contains a description of the activities engaged in by the intern in this setting. These activities were designed to provide practical experience in routine administrative tasks and meet technical objectives listed in the prospectus.
Program description

The 1979 summer school in Portage School District served both Junior and Senior High students. It ran for six weeks from June 18 through July 26, four days a week from 7:30 a.m. to 12:30 p.m. At the Junior High level, band, English, math and social studies classes were offered. These classes could be taken for enrichment purposes but in many cases a student was required to successfully complete specific classes in order to be promoted. At the Senior High level, band, English, general math, physical education, social studies and United States government and economics were offered. Some students enrolled in classes to make up for credits previously lost, while others enrolled in order to earn advanced credit. By far the largest group was made up of students enrolled in the United States government - economics block which met from 7:30 a.m. to 12:30 p.m. Most of the students took this block for advanced credit.

Portage Public Schools' summer school program was largely self-supporting. The Junior High program did not pay for itself but the Senior High program helped make up for some of this deficit. The Board of Education subsidized the program to some extent. In 1979, the summer school was allocated $5500 in the budget. However, not all of this money was needed. The summer school enrollment was unusually large in 1979. There were over 400 students enrolled. This was probably due to the fact that no other school system in the area was offering summer classes and a number of non-resident students were enrolled.
The Community School Coordinator was responsible for the summer school program. Another individual was hired as a part-time principal, part-time teacher and the intern was assigned as part-time principal. The official title given to the intern was Assistant Director of Portage Secondary Summer School.

**Activities of the intern**

The duties assigned to the intern included dealing with attendance problems, patrolling hallways and the parking lot so as to discourage student misbehavior and acting as principal from 10:00 a.m. to 12:30 p.m. Other activities included locating books and materials for teachers, helping register students and take money, making sure that class lists were updated, answering questions for citizens, dealing with complaints, dealing with discipline problems, conferring with teachers concerning students, assigning tasks to clerical staff, conferring with parents concerning their children, dealing with vandalism, supervising preparation of mid-term and final reports, collecting books and materials at the end of the session. (see Appendix A)

These activities can be divided into two groups: paper work and human relations tasks. The most time was taken up by paper work. This included keeping attendance records, supervising reports to parents and updating class lists. The most challenge, however, was presented by the human relations tasks. The human relations tasks were of three types: dealing with students, dealing with parents and dealing with teachers. Dealing with parents seemed the most difficult.
Contact with students consisted of both informal conversations and formal disciplinary meetings. In some cases, disciplinary action was taken against students for severe infractions of the rules. Contacts with teachers usually involved either a discussion of problems with students or an explanation of administrative procedures. Contacts with parents usually were related to problems their children were having in summer school, either with attendance, behavior or work. Some of the parents tended to be protective toward their children and on occasion could be difficult to deal with. The most common problem encountered with parents involved their desire that the school make exceptions for their child. There were many requests that rules be bent or suspended. Another common problem involved disagreements with teachers. The intern was required to mediate several of these disagreements. The best approach with upset parents seemed to be to allow the parents to express themselves fully. After stating their positions, they usually were able to listen to the school's position and a reasonable discussion was possible. On several occasions, however, it was necessary to allow some time to intervene between contacts in order to reach a satisfactory conclusion.
Conclusion

This final section of Chapter II contained a description of the summer school program and the intern's activities while involved in this program. The intern was able to gain practical experience in performing routine administrative tasks. Knowledge was also gained concerning administrative tasks, responsibilities and problems of a building principal.

The following skills seemed to be essential for a successful building administrator: good communication skills, including good listening skills, organizational ability and ability to delegate work to others. Communication skills seemed essential because a major part of the principal's job involved dealing with other people. Good organizational skills and the ability to delegate work to others seemed essential due to the large amount of paper work required of a building administrator. The intern was able to gain experience in all three types of skills while involved in the summer school program.
CHAPTER III

ANALYSIS OF INTERNSHIP EXPERIENCE

Introduction

Chapter III contains an analysis of the degree to which the objectives stated in the prospectus were met during the internship. This analysis is divided in four parts. In the first three sections, each type of objective, conceptual, human and technical, is analyzed separately. Activities described in Chapter II are discussed in relation to the objectives and a conclusion is stated concerning the extent to which the objective was met. The final section describes any unanticipated outcomes of the internship in terms of knowledge or skills.
Conceptual Objectives

All of the conceptual objectives were met by the intern. The first two conceptual objectives: to become familiar with the administrative structure of a school system and to understand the responsibilities of major administrators in the school system were met. The intern obtained and studied the organizational chart of the Portage Public School System. The intern became familiar with the responsibilities of the major administrative officers listed through interviews and observations. A complete discussion is included in Chapter II, Description of Selected Administrators, Introduction.

Conceptual objectives three and four were also met. Chapter II, Description of Selected Administrators, contains an analysis of the jobs of Superintendent, Curriculum Director, Director of Secondary Education, Director of Elementary Education, Business Manager and Community Education Coordinator. A description of sources of problems for these administrators is also included. A description of the job of building principal and sources of problems for this administrator is included in Chapter II, The Summer School Program.
Human Objectives

The first human objective listed in the prospectus was: to become familiar with the background and experience of selected administrators. This objective was met through interviews with various administrators. A description of their background and experience is included in Chapter II, Description of Selected Administrators.

The second human objective was also met. This objective was: to identify different styles of management behavior which administrators display. Various administrators were interviewed and observed during the internship. They were then analyzed in terms of management theories. A complete description of each administrator's style is included in Chapter II, Description of Selected Administrators.

The third human objective: to gain an understanding of what characteristics are most valuable for an effective administrator, was not fully met. The first problem involved determining what constituted effectiveness. However, if effectiveness were judged in terms of the efficiency with which tasks were performed, and the morale of subordinates, most of those analyzed were effective.

The second problem involved identifying common characteristics of those studied which are important for effectiveness. Most of those studied seemed to have very different styles and there seemed to be few common characteristics, with the possible exception of
good communication skills. It seemed to the intern that communication skills were important for effective administrators. As Batten (1976, p. 51) suggested "the manager's total effectiveness rises or falls directly in proportion to his face-to-face skills - his interpersonal insights and actions."

Perhaps, as Fiedler (1977) concludes, different situations call for different types of leadership. It is possible that an administrative assistant must be more task-oriented than a curriculum director or that a director of employee relations who is head negotiator for the school system must be more of a "Theory X" manager (Sergiovanni & Starratt, 1971, p. 77) than a community school coordinator.
Technical Objectives

The first technical objective, to gain experience in performing routine administrative tasks required of a building principal, was met by participation in the summer school program. The intern had an opportunity to act as building principal and perform many of the tasks required of the job. However, the summer school program was somewhat different from a regular school program and the intern did not have the opportunity to perform all tasks required of a principal. In general, however, the objective was met. A complete description is included in Chapter II, The Summer School Program.

The second technical objective, to develop increased proficiency in program development, was met by participation in the planning of the Comstock-Portage Adult High School program for the Department of Social Services. The intern had an opportunity to attend organizational meetings and to perform some tasks required to implement the program. A description of this project is included in Chapter II, Department of Social Services Project.

The third technical objective, to comprehend the process of organizing a course for teachers within the school setting was also met. The intern was involved in the planning of a class to be offered to teachers in the summer of 1979. Although the course had to be cancelled due to low enrollment, the intern did gain a better understanding concerning the process of organizing such a class. A description of this project and the activities performed is included in Chapter II, In-Service Training Project.
Additional Outcomes

In addition to experiences designed to meet the objectives listed in the prospectus, the intern had the opportunity to become involved in other activities. These activities provided the opportunity to gain knowledge in unanticipated areas.

The intern had the opportunity to interview and observe the employee relations director although this administrator was not originally chosen for study. Contact with this administrator provided valuable information in regard to the personnel function of a school system. Study of this administrator also afforded an opportunity to analyze another style of management.

Another unanticipated activity for the intern was involvement in the project for the business manager. This project allowed the intern to gain additional knowledge concerning the financial operation of a school system. A complete description of this project is included in Chapter II, Projected investment earnings project.
Conclusion

This chapter contained a description of the outcomes, both anticipated and unanticipated, of the internship. The majority of the objectives listed in the prospectus were met through the activities engaged in by the intern. There were also several unplanned activities which provided additional knowledge and experience. In general, the internship afforded opportunities for the intern to gain experience in and knowledge of both building level administration and central office activities.
CHAPTER IV

CONCLUSIONS

One goal of this field experience was to increase the intern's knowledge concerning administration of school systems. The activities pursued at Portage Public Schools enabled the intern to gain exposure to areas in which previous experience was limited. Knowledge gained concerning central office activities, community school operations and financial management was of particular value in meeting this goal.

In regard to central office activities, the opportunity to interview, observe and work with various central office administrators was particularly beneficial for the intern. Previous experience with central office activities was limited and the field experience provided an opportunity to increase knowledge in this area.

Previous experience with and knowledge of community school operations was also limited. Through working with the Community School Coordinator and attending a number of meetings related to this area, the intern was able to gain additional knowledge concerning adult education.

Another area in which knowledge was limited prior to the internship was the area of school district financial operations. The opportunity to work in the business office enabled the intern to gain more in-depth knowledge of the financial aspects of school administration.
A career goal of the intern was to work as an administrator at the building level. Practical experience gained during the internship was helpful in improving skills which seemed necessary for an administrator. The opportunity to perform a number of tasks required of a building principal while involved in the summer school program proved especially valuable. Also, the portion of the internship spent with the Business Manager provided practical experience in working with various formulas to determine school income. This seemed to be a valuable skill for an administrator at any level.

In terms of the appropriateness of the site selected, it seemed to the intern that Portage Public Schools was a fortunate choice. The school system not only offered a summer school program, but also had a large central office administrative staff. This allowed the intern to meet all objectives, to some extent, during the internship. In addition, the majority of the administrators with which the intern came in contact were willing to make themselves available for interviews and were quite helpful to the intern.

It seemed likely that this school system had unique characteristics not found in other school systems. Smaller school systems, in particular, would probably have a very different structure. However, it seemed to the intern that much of the knowledge gained during this internship could be generalized to other settings.

If the internship had taken place during the regular school year, it seemed likely that the intern would have gained a somewhat
different perspective. The summer school program was not the same as a regular school program. Also, at the central office level, summer activities were quite different from activities during the school year. The pace was much slower in the summer and demands on administrators' time appeared less. However, during the regular school year, the intern probably would have been unable to act as principal to the extent possible during the summer school. Also, central office administrators would likely not have been as accessible for interviews and would not have had as much time to spend with the intern. Therefore, there were some real benefits gained from a summer internship.

The intern was also made aware of some areas in which further development might be of value. Communication skills seemed to be important for administrators at all levels. Further development of this skill seemed desirable. Also, it appeared to be useful to further increase knowledge regarding school finances. Finally, improved organizational ability might be of value in dealing with routine tasks required of an administrator.

In general, this internship experience was a valuable one. Gains in knowledge and experience furthered the achievement of the intern's career goals. In addition, the experience was an enjoyable one for the intern due to the interesting individuals with which the intern came in contact and the variety of activities pursued.
REFERENCES


APPENDIX A

INTERNSHIP LOG

June 11, 1979 - June 15, 1979

Monday, June 11, I met with Henry Houseman and Larry Dopp, Community Education Director for Comstock Schools. The topic was the request by the Department of Social Services that a joint program for selected individuals be set up. The program is to include a "job club" - career preparation activities, a high school completion class and vocational programs. They have identified approximately 200 persons who will be required to participate or lose a month's assistance. The goal is employment of all these individuals.

The discussion was about what could be offered, how it could be set up and who would be responsible for what. I was assigned to find out about Metro bus transportation to Comstock and Portage.

I observed the two personalities and the contrast between them. They have different styles but work well together and complement each other. There is also a joint project in the Adult High School for next year because Portage has state aid and Comstock doesn't.

In the afternoon, I visited Metro Transit and discussed bus schedules with the people there. I obtained copies of the schedules and prepared a summary for Henry.

On Wednesday, June 13, I was introduced to Dr. Harper, Curriculum Director. We discussed his position and responsibilities.
Also, he described the problems and frustrations he feels. He is a very intelligent, open individual who is loaded down with many responsibilities, and he is feeling the pressure.

I then attended a meeting of SMACE - an association of 13 school district Community Education Directors. They cooperate in order to be able to afford promotion and in-service which for separate districts would not be financially possible. The variety of personalities was fascinating. There was little agreement on goals or directions but reluctantly they reached agreement on T.V. ads and posters. It appears that many of them doubt the value of the group. There was one really negative individual, the others were only mildly skeptical.

On Thursday, June 14, I attended a planning session for a reading inservice at Dr. Harper's suggestion. Dr. Harper sent an agenda with Dick Loney, the Career Education Coordinator and came at the end himself to assess progress and answer questions. It was interesting except that after Dick Loney left, there was no designated leader to keep the others on task. They needed someone with the authority to direct their efforts and they kept getting off the task and into their own special professional concerns. When Dr. Harper came, he brought them back on track, told them what tone he wanted set and urged them to meet again to finish their plans.

On Friday, June 15, I met with the Summer School staff and Henry concerning procedures. Henry introduced me and informed them that I would be in charge from 10:00 to 12:30 every day. He is low-key, re-
spectful of others, seems non-directive, but on important matters, very forceful. The other principal, Paul Butch, is very forceful, professional, at ease and knows exactly what he is doing. The response from the staff was rather cautious. I believe they do not exactly understand my position and I will have to establish credibility. Both Paul and Henry cautioned me to be careful in dealing with the regular school secretary as she is very territorial.
June 18, 1979 - June 22, 1979

Monday through Thursday, in the mornings, I worked with the summer school. I became familiar with all the routine things a principal must be concerned with — attendance; books; supervising the halls and parking lot; registration of students; answering parent questions by phone and in person; class lists and student placement; supplies; room assignments; teacher assignments; helping teachers with routine problems.

Also, we had a special meeting with the P.E. teacher, who is at another building, concerning how to get attendance information to me. He will call me every day. Another meeting was with the staff on what special arrangements we might need to make due to the gas crisis. Another special meeting was held with two teachers concerning how to handle a student whose parents have brought a lawsuit against Portage Schools. Henry cautioned that we all be impartial and fair in our dealings with him. Another event was the suspension of a student for smoking in the parking lot. I suspended him for a day and informed his parents about it.

In the afternoons, I went to the central administration building. Primarily, I worked with Dr. Harper. He has decided to put me in charge of organizing the Gross Motor Skills Remedial Clinic for July and August. I will have to contact possible participants for registration, work with people from Michigan State University on this and also sign up students for the clinic by contacting their parents. It will involve planning, paper work and contact with the public.
Henry and I met with Larry Dopp again and some people from the D.S.S. about the program they want Portage and Comstock to develop. They have changed their minds and want only the high school completion program, remedial classes and vocational classes. The "job club" will be done by Goodwill because it is already set up there. They will guarantee a fourth Friday count of 100 so it will be financially possible. We will test and enroll individuals the second week in August. I am in charge of coming up with the test. It was very interesting observing Henry and Larry dealing with the people from D.S.S. The woman is a very aggressive, unpleasant person who constantly interrupted and didn't listen well. They described her to me ahead of time and I think they were generous in their description. They were careful to be polite during the meeting and only once did Larry get upset and interrupt her. There is something to be learned from this - what not to do. Interrupting and poor listening do not make good impressions on people or help communications.

I spent time with Wayne Petrolje, Testing and Research Coordinator, examining tests to use and planning the testing program. I also met with Freeman Russell, Director of Secondary Education. I interviewed him about the responsibilities of his job, problems he encounters and his attitude towards his work. The Director of Secondary Education is a line position. He supervises all the secondary principals. He enjoys his job and is well-respected by other staff members.
Monday through Thursday mornings, I was involved with the summer school program. The following were activities I was involved in:

calling parents of students with two or three absences (only three are allowed) - 27 calls were made;
contacting a parent whose daughter should not be on school grounds;
contacting a parent of a student suspended for smoking;
contacting three parents concerning their children's behavior;
holding two parent conferences, one parent was concerned about his son and I suggested professional help, another parent was concerned about the absences of her child;
holding five conferences with students about discipline;
patrolling the halls and parking lot during breaks;
talking to students about an incident concerning a vandalized bike;
talking to a student about late enrollment and registration;
attending a conference about a student involved in a law suit against the school - we must begin keeping anecdotal records;
driving to the PE class at Central to get money and inquire about a student teacher;
mediating a conflict between a teacher and parent about a girl's manner of dress;
preparing items for a staff bulletin.
On Wednesday afternoon, I attended a meeting with Henry Houseman and Mr. Larry Dopp concerning the joint adult high school project they are involved in. The proposal for the D.S.S. program was also finalized. The schedule for the joint adult high school was set up. Henry will get it typed. They are almost ready to begin contacting students and start registration.

On Monday, Tuesday, Thursday afternoons and Friday all day, I was at the Central Administration Building working on the Remedial Gross Motor Skills Clinic. I met with Dr. Harper several times concerning problems or questions I had. I talked with a parent interested in enrolling her child in the Clinic. I referred this to Dr. Harper as the child is severely handicapped. I began making the priority list of children taken from the school recommendations. Also, I prepared for parent phone contacts and worked on a follow-up letter. Because response to the letter to possible registrants is not very great, I have begun calling those on the list for an answer. It appears that enrollment will not be very large at all.
July 2, 1979 - July 6, 1979

In the mornings on Monday, Tuesday and Thursday, I spent my time at the summer school. Some of the activities I was involved in included:

- 93 calls on attendance;
- two calls to parents about children's work;
- four conferences with students about work and attendance;
- two conferences with parents concerning attendance;
- six letters sent to students dropped because of attendance;
- a meeting with Henry and the Assistant Community Education Director from Three-Rivers about procedures Portage uses;
- patrolling halls and parking lot;
- conferences with teachers concerning students' attendance, work and behavior;
- okayed late "failure" notices which went out Friday;
- held several conferences concerning a student coming to us from the Juvenile Home;
- met with Sue Slade, adult high school counselor, about the tests we ordered for the D.S.S. program;
- talked to a parent about a possible extension for her daughter because she is at her limit for absences;
- kept up attendance records.

On Monday afternoon, I met with Dr. Conti. I interviewed him concerning his position, problems involved in his job and his personal background. It was a very valuable discussion.
On Friday, I met with Dick Loney, Career Education Coordinator and Personnel Assistant. He discussed his position and background as well as his goals.

Also, I met with Charlene Foote, Assistant Principal at Portage Northern High School and summer personnel assistant. We had a valuable discussion concerning her position and problems she encounters. This was perhaps the most valuable discussion for me so far because I got the viewpoint of a woman administrator.

The rest of the week, I spent on the Clinic, making calls to possible participants. It appears that enrollment will not be large enough to justify holding it. We may have to cancel this Clinic.
July 9, 1979 - July 13, 1979

In the mornings, I was at Secondary Summer School. Some of the activities engaged in were:

58 calls about attendance;
one call about discipline;
one call about a conflict in a student's schedule;
a number of conferences with teachers about student attendance and discipline;
four conferences with students about behavior and attendance;
suspending a student for smoking for the second time, which means that he will be dropped from the program;
a conference with the Mother of the suspended student;
discussions with teachers about names for failure notices;
phone conferences with several parents about their children's problems in class;
giving a tour to a citizen and her guest from England;
patrolling hallways and the parking lot.

Monday afternoon, I attended two meetings with Henry and Larry Dopp from Comstock. One was with a Channel 41 representative and one with a WKZO representative. The purpose of the meetings was to buy TV ads for adult high schools as part of the SMACE joint project.

Tuesday through Thursday afternoon and Friday morning, I was at the Central Administration Building. I met with Dr. Harper concerning cancelling the clinic because of low enrollment. I called all those
signed up and informed them of this decision. Dr. Harper will send letters to parents of children recommended by the schools.

I met with the Business Manager, Paul Wartner, and with Al Garlick, Director of Secondary Education concerning their areas of responsibilities and problems involved in their jobs.

Mr. Wartner suggested that I work on a project for him. I will be doing a cash flow analysis and investment earnings projection. This should give me a good picture of the financial aspects of running a school system.
July 16, 1979 - July 20, 1979

Monday through Thursday mornings were spent in the summer school. Activities included:

- 63 calls on attendance;
- four conferences with students concerning their behavior;
- two conferences with parents;
- patrolling hallways and the parking lot;
- ten conferences with teachers about students.

In the afternoons and all day Friday, I worked in the business office on the cash flow analysis and investment earnings projection. I began by meeting with the Assistant Business Manager. He suggested that it would be valuable for me to learn the formula for millage, the state aid roll-back formula and the state aid formula and do my own computations rather than just take figures from the proposed budget. I did this and then worked with the head bookkeeper on other sources of revenue and expenditures. The preliminary budget is now being revised to prepare for final presentation to the School Board. The Business Manager is working on the revenue and the Assistant Manager on the expenditures. The head bookkeeper then checks the figures to be sure they balance. This is a tedious and lengthy procedure for all involved. I observed the working relationships between the Business Manager and his Assistant as well as between the Assistant and the other members.

I also was present at a number of informal meetings between the various administrative staff members. This was valuable, as it gave
further indications of their personalities, the relationships that exist and the power structure of the central office staff. Dr. Harper has taken a position at Zeeland as Superintendent. The former principal at Central High School has been chosen to replace him.

This was the final week of summer school. I was involved in this Monday through Thursday mornings. Again, I engaged in the following activities:

- 17 calls on attendance or to inform parents of their child being dropped due to excessive absence;
- two conferences with students who are very close to being dropped due to tardiness;
- a conference with Henry, Frank Gawkowski (Assistant Principal at Central High School), a parent and a student concerning the student's abusive language to Mr. Gawkowski;
- several conferences with teachers concerning students who have exceeded their limit of absences and would like an extension;
- conferences with students caught smoking in the restroom;
- patrolling the halls and parking lot;
- conferences with several citizens, a student and his Mother concerning his bike which was vandalized by a gang of our students whom we could not identify;
- collection of books and final grades;
- preparation of final attendance records.

The afternoons and Friday were devoted to working in the business office. The budget has finally been balanced and final figures set for presentation to the School Board.
I completed my cash flow analysis by the month and met with the Assistant Business Manager concerning what procedures to follow at this point. The next step is to break down the monthly figures into weekly figures so that weekly cash balances can be obtained. Based on this, investment earnings will be calculated using three different methods. This work was done and the results discussed with Rod Annas, the Assistant Business Manager. The projections are about $100,000 lower than the Business Manager's projections. Rod checked this with the school district's investment consultant in Lansing and his projections agreed with my figures.

I interviewed Ted Vliek, Administrative Assistant to the Superintendent, concerning his areas of responsibility, problems encountered in his job and his feelings about his job.

I also interviewed Charles Hammond, the Employee Relations Director. Our discussion was about the same areas as my interviews with the other administrators.

Again, I spent some time observing the central administrators in informal meetings. This continues to give me insight into their personal styles and relationships.
July 30, 1979 - August 1, 1979

On Monday, July 30, I prepared the rough draft of my report for presentation to the Business Manager. I not only included my final figures, but also an explanation of procedures and formulas used to calculate interest. This first copy was presented to Mr. Annas for comments and corrections.

On Wednesday, the rough draft of the report was corrected and a section was added, explaining why interest earnings in 1979-80 would probably be lower than in 1978-79. This information was taken from ledgers recording interest earnings for this year.

I interviewed Judy Steepleton, A-V and Media Director concerning her job and areas of responsibility. We also discussed her unique position as one of only two women on the central administrative staff.

On Tuesday afternoon, I attended a meeting with Henry, Larry Dopp and Sue Slade concerning preparations for the D.S.S. testing program, beginning August 13. Decisions were made as to who would have what areas of responsibility and what the cut-off figures would be for placement in the various classes. We decided to add another section of both remedial reading and math it needed.
July 13, 1979 - July 17, 1979

Tuesday through Friday mornings, I was involved in the testing program for the D.S.S. clients referred to the adult high school program. The clients reported at 8:30 for orientation, testing began at 9:00 and lasted until 11:00 after which the tests were corrected and the clients enrolled in appropriate classes.

The Test of Adult Basic Education, reading vocabulary and comprehension and math computation sections were used. This provided an approximate grade level equivalent. Those scoring from third through sixth grade levels were placed in one section of Refresher Reading and Math and those scoring from sixth through ninth grade were placed in another section. Those scoring above ninth grade level were placed in a GED preparation class.

Approximately 40 clients had been scheduled for testing each day. However, our turn-out rate was approximately 30%, meaning some make-up days will have to be arranged. The groups were a mixture of men and women, approximately half black and half white, with a variety of age levels.

Test results indicated that most of these individuals were reading at about the fourth grade level or lower. A very small proportion could be placed in the GED preparation class.
APPENDIX B

PROJECTED INTEREST EARNINGS

FOR

PORTAGE PUBLIC SCHOOLS

1979 - 1980

by

Mary A. Groening
INTRODUCTION

The purpose of this project was to prepare a cash flow analysis of the General Fund of Portage Public Schools in order to estimate the earnings from interest for the 1979 - 1980 school year.

A fund is a sum of money or other resources set aside for specific activities of the school district. There are three funds used to record the transactions related to the educational goal of the school district. The largest fund is the General Fund which is used to record monies received and disbursed in the daily operation of the educational processes of the school district. Another fund is the Building and Site Fund which is used to record transactions relative to the expansion or improvement of the facilities of the school district. The Debt Retirement Fund is used to record the collection and subsequent disbursement of monies earmarked for the retirement of the bonded indebtedness.

Other funds are used to record transactions related to the extracurricular activities under the control of the district. The School Service Fund is used to account for activities when there is a need to determine the results of operations such as in the food service operation or athletics. The other funds are Trust and Agency Funds which are held in trust for student clubs and gifts or bequests for specific purposes.

The Long-Term Debt Accounts are used to record the total long-term debt and to record the fixed assets of the school district.
Property Accounts are used to accumulate the cost of property owned by the school district.

All these monies designated for different purposes are kept in separate bank accounts and are recorded in separate, distinct funds (Clarke, 1978, pp. 1-4). This project deals only with monies in the General Fund.
GENERAL FUND REVENUE

General Fund revenue comes from local sources (primarily taxes), state sources, intermediate school district payments and federal sources.

Local sources

The majority of revenue from local sources comes from property tax. Taxes are now collected twice a year in Portage. One half is collected in the summer and one half in the winter. It is expected that 20% of the summer tax will be received in August, 25% in September, 50% in October and most of the remainder in November. 40% of winter taxes should be received in January, 55% in February and the remainder in March. (see Table I)

State Sources

The major portion of revenue from the state comes from the basic aid grant. In Michigan, state aid is based on the equal yield-flat grant concept. An equal yield formula provides for the distribution of state aid in a way that will guarantee each district the same number of total dollars per pupil for each mill of tax levied locally (Wentrack, 1978, pp. 1-2). The state sets a certain amount of aid per pupil in the state, then local support is deducted and the state provides the difference. State aid is usually received every other month beginning in August. The payments are approximately equal in amount. (see Table II)
Table I

Local Revenue

State equalized valuation: $362,832,861.00

General Fund authorized millage: 32.20

Rollback millage: 31.86

(*78 SEV*) (Inflation factor)

'79 SEV* - Additions + Losses

Tax revenue: $ 11,559,855

- Trailer tax & act 198 10,000
- Interest on investments 400,000
- Interest on delinquent tax 2,000
- Tuition: Elementary 500
- Secondary 2,000
- Sale of equipment 5,000
- Rental of facilities 9,000
- Mini course 1,700
- Athletics: Central High 22,000
- Northern High 22,000
- Discounts earned 5,000
- Misc. - Other 17,000

Total of Other Local Sources 496,200

*SEV - State Equalized Valuation
Table II
State Revenue

Basic aid formula, 1979 - 1980:

$325 per pupil plus
$ 43 per mill up to 30 mills plus
$ 43 per ½ millage over 30 mills

Gross per pupil aid: $ 1,655

Deduction for local support: 37,989

\[
\frac{SEV}{Enrollment} = SEV \text{ per pupil}
\]

\[
SEV \text{ per pupil} \times \text{millage rate} = \text{local support ($1,175 per pupil)}
\]

Net per pupil state aid for Portage: 480

Projected enrollment: 9551

Net basic state aid: $ 4,584,480

Declining enrollment aid:

Last year's enrollment (9,825)
Minus this year's enrollment (9,551)
x 27% (74 pupils)
x gross state aid ($1,655) equals 122,470

Court placed children 5,000
Vocational education 153,000
Regular transportation 225,000
Driver education 27,150
Reading support 30,000

Total other state sources: 440,150

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Other revenue

Other revenue includes Special Education reimbursement from Kalamazoo Valley Intermediate School District which is usually received in January, February, April and June in equal amounts. Also, there are federal payments, intermediate payments, community school and summer school revenue and other miscellaneous payments. These account for a small percentage of the total and are received on an irregular basis. (see Table III)

Table III
Other Revenue

<table>
<thead>
<tr>
<th>Description</th>
<th>Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>Intermediate Federal</td>
<td>$2,000</td>
</tr>
<tr>
<td>Federal</td>
<td>209,678</td>
</tr>
<tr>
<td>Special education</td>
<td>898,000</td>
</tr>
<tr>
<td>Community school</td>
<td>98,500</td>
</tr>
<tr>
<td>Summer school</td>
<td>29,485</td>
</tr>
<tr>
<td>Miscellaneous</td>
<td>81,500</td>
</tr>
<tr>
<td>TOTAL GENERAL FUND REVENUE</td>
<td>$18,522,318</td>
</tr>
</tbody>
</table>
GENERAL FUND EXPENDITURES

In the general fund, the largest expenditure is for payroll and fringe benefits. Other expenditures of the system are for supplies, transportation, maintenance and operation, administration, unemployment and workers' compensation assessment and interest. Employees are paid every two weeks and the other payments are made throughout the month. (see Table IV)

Table IV

<table>
<thead>
<tr>
<th>Expenditures</th>
<th>Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>Salaries and fringe benefits</td>
<td>$15,347,566</td>
</tr>
<tr>
<td>Other Expenses</td>
<td>3,543,677</td>
</tr>
<tr>
<td>Total general fund expenditures</td>
<td>18,891,243</td>
</tr>
</tbody>
</table>
CASH FLOW ANALYSIS

Figures for projected revenues and expenditures for the year were taken from the proposed budget. These totals were divided into monthly amounts to give a picture of available cash for investment each month. (see Table V)
### Table V

#### Cash Flow Analysis

<table>
<thead>
<tr>
<th></th>
<th>July</th>
<th>August</th>
<th>September</th>
<th>October</th>
<th>November</th>
<th>December</th>
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</thead>
<tbody>
<tr>
<td><strong>Beginning balance</strong></td>
<td>$3,051,649</td>
<td>$1,858,327</td>
<td>$2,320,559</td>
<td>$2,298,937</td>
<td>$4,580,147</td>
<td>$3,402,539</td>
</tr>
<tr>
<td><strong>Estimated revenue</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Local</td>
<td></td>
<td>1,155,985</td>
<td>1,444,982</td>
<td>2,889,964</td>
<td>288,996</td>
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<td>State</td>
<td></td>
<td>857,850</td>
<td>857,850</td>
<td>857,850</td>
<td>857,850</td>
<td></td>
</tr>
<tr>
<td>KVISD</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Other</td>
<td></td>
<td></td>
<td>83,396</td>
<td>83,396</td>
<td>83,396</td>
<td>83,396</td>
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<tr>
<td><strong>Total revenue</strong></td>
<td>$3,051,649</td>
<td>$3,955,559</td>
<td>$3,848,937</td>
<td>$6,130,147</td>
<td>$4,952,539</td>
<td>$4,343,785</td>
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<td><strong>Less estimated expenditures</strong></td>
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<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Payroll deductions</td>
<td>337,962</td>
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<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Payroll</td>
<td>551,752</td>
<td>1,335,000</td>
<td>1,250,000</td>
<td>1,250,000</td>
<td>1,250,000</td>
<td>1,250,000</td>
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<tr>
<td>Board payments</td>
<td>303,608</td>
<td>300,000</td>
<td>300,000</td>
<td>300,000</td>
<td>300,000</td>
<td>300,000</td>
</tr>
<tr>
<td>Other</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Estimated ending balance</strong></td>
<td>$1,858,327</td>
<td>$2,320,559</td>
<td>$2,298,937</td>
<td>$4,580,147</td>
<td>$3,402,539</td>
<td>$2,793,785</td>
</tr>
<tr>
<td></td>
<td>January</td>
<td>February</td>
<td>March</td>
<td>April</td>
<td>May</td>
<td>June</td>
</tr>
<tr>
<td>---------------------</td>
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<td>--------------</td>
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</tr>
<tr>
<td><strong>Beginning balance</strong></td>
<td>$2,793,785</td>
<td>$3,863,652</td>
<td>$6,108,357</td>
<td>$4,930,749</td>
<td>$4,491,495</td>
<td>$3,024,891</td>
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<tr>
<td><strong>Estimated revenue</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Local</td>
<td>2,311,970</td>
<td>3,178,959</td>
<td>288,996</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>State</td>
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<td>857,850</td>
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<td>857,850</td>
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<td>857,850</td>
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<tr>
<td>KVISD</td>
<td>224,500</td>
<td>224,500</td>
<td></td>
<td>224,500</td>
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<td>224,500</td>
</tr>
<tr>
<td>Other</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Total Revenue</strong></td>
<td>$5,413,652</td>
<td>$8,208,357</td>
<td>$6,480,749</td>
<td>$6,096,495</td>
<td>$4,574,891</td>
<td>$4,190,637</td>
</tr>
<tr>
<td><strong>Less estimated expenditures</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Payroll deductions</td>
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<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Payroll</td>
<td>1,250,000</td>
<td>1,800,000</td>
<td>1,250,000</td>
<td>1,250,000</td>
<td>1,250,000</td>
<td>1,250,000</td>
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<tr>
<td>Board payments</td>
<td>300,000</td>
<td>300,000</td>
<td>300,000</td>
<td>300,000</td>
<td>300,000</td>
<td>300,000</td>
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<tr>
<td>Other</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Estimated ending balance</strong></td>
<td>$3,863,652</td>
<td>$6,108,357</td>
<td>$4,930,749</td>
<td>$4,491,495</td>
<td>$3,024,891</td>
<td>$2,640,637</td>
</tr>
</tbody>
</table>
Subject: Investment of School Funds

The Business Manager is responsible for maximizing interest earnings for the school district. He is authorized to invest debt retirement funds, building and site funds, or general funds of the district. Such investments shall be restricted to the following:

a) Bonds, bills or notes of the United States, or obligations, the principal and interest of which are fully guaranteed by the United States or obligations of the state.

b) Certificates of deposit issued by any state or national bank organized and authorized to operate a bank in this state.

c) Commercial paper rated prime at the time of purchase and maturing not more than 270 days from the date of purchase.
INVESTMENT ANALYSIS

The monthly figures were further broken down into weekly figures to obtain estimated weekly cash balances. Interest was then calculated using three different methods.

**Method one**

Interest was calculated on each end-of-week balance for a seven-day period of investment. This resulted in weekly interest earnings figures. These were then totaled to obtain an annual figure.

\[
\frac{(\text{Week's balance}) \times (\text{Interest rate})}{360} \times 7
\]

An interest rate of 10% was used for July through September, 9 3/4% for October and November, 9 1/2% for December through May and 9 1/4% for June. (see Table VI)

**Method two**

Using each end-of-week balance, an average cash balance for the month was obtained. Interest was calculated on each average monthly balance for a period of 30 days of investment.

\[
\frac{(\text{Average Monthly Balance}) \times (\text{Interest rate})}{360} \times 30
\]

The rate used for July through December was 10 1/4%, for January and February, 9 3/4%, for March through June, 9 1/2%. (see Table VII)

**Method three**

The average monthly cash balances were averaged to obtain an annual average cash balance. Interest was then calculated on the average annual cash balance. The rate used was 9 3/4%. (see Table VIII)

\[
(Average \text{ annual balance} \times 9 \frac{3}{4}%)
\]
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### Table VI

**Method One**

<table>
<thead>
<tr>
<th></th>
<th>Revenue</th>
<th>Expenditures</th>
<th>Balance</th>
<th>Interest</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>July</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Beginning balance</td>
<td>$2,227,856</td>
<td>$1,548</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Ending balance</td>
<td>$1,858,327</td>
<td>$9,000</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Interest earned</td>
<td>$2,320,559</td>
<td>$3,213</td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>August</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Beginning balance</td>
<td>$1,858,327</td>
<td>$4,331</td>
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</tr>
<tr>
<td>Week ending date:</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>3</td>
<td>$874,529</td>
<td>$505,000</td>
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<td>$1,548</td>
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<td>10</td>
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<td>60,000</td>
<td>$2,184,535</td>
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<tr>
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Estimated interest earned

16,637
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<th>Balance</th>
<th>Interest</th>
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</thead>
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<td>Week ending date:</td>
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<td></td>
<td></td>
</tr>
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<td>14,985</td>
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<td><strong>October</strong></td>
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<td>Beginning balance</td>
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<td>Estimated interest earned</td>
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### Table VI (continued)

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<tr>
<th>Week ending date</th>
<th>Revenue</th>
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<th>Balance</th>
<th>Interest</th>
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</tr>
<tr>
<td>Beginning balance</td>
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<td>Week ending date:</td>
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</table>

<p>| Week ending date:|         |              |                |          |
| December         |         |              |                |          |
| Beginning balance|         |              | 3,402,539      |          |
| Week ending date:|         |              |                |          |
| 7                | 878,699 | 700,000      | 3,581,237      | 6,285    |
| 14               | 20,849  | 75,000       | 3,527,086      | 6,615    |
| 21               | 20,849  | 700,000      | 2,847,935      | 6,515    |
| 28               | 20,849  | 75,000       | 2,793,785      | 5,260    |
| Estimated interest earned |         |              |                | 24,675   |</p>
<table>
<thead>
<tr>
<th>Date</th>
<th>Beginning Balance</th>
<th>Week Ending Date</th>
<th>Estimated Interest Earned</th>
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<td>$7,533</td>
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<td>$6,264</td>
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<td>$6,184</td>
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<td>$34,571</td>
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<td>Revenue</td>
<td>Expenditures</td>
<td>Balance</td>
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<tr>
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<td>---------</td>
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**Estimated interest earned**

<table>
<thead>
<tr>
<th>Week ending date</th>
<th>Revenue</th>
<th>Expenditures</th>
<th>Balance</th>
<th>Interest</th>
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</thead>
<tbody>
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**Estimated interest earned**

36,429
Table VI (continued)

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<th>May</th>
<th>Revenue</th>
<th>Expenditures</th>
<th>Balance</th>
<th>Interest</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>$</td>
<td>$</td>
<td>$</td>
<td>$</td>
</tr>
<tr>
<td>Beginning balance</td>
<td>4,491,495</td>
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</tr>
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<td>685,000</td>
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<td></td>
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<table>
<thead>
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<th>Revenue</th>
<th>Expenditures</th>
<th>Balance</th>
<th>Interest</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>$</td>
<td>$</td>
<td>$</td>
<td>$</td>
</tr>
<tr>
<td>Beginning balance</td>
<td>3,024,891</td>
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<td></td>
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<tr>
<td>6</td>
<td>878,699</td>
<td>700,000</td>
<td>3,203,590</td>
<td>5,440</td>
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<td>3,149,439</td>
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<td>Month</td>
<td>Average Cash Balance</td>
<td>Interest Earnings</td>
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<tr>
<td>----------</td>
<td>----------------------</td>
<td>-------------------</td>
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<tr>
<td>July</td>
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<tr>
<td>August</td>
<td>2,016,411</td>
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<tr>
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<td>3,118,900</td>
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<tr>
<td>November</td>
<td>3,757,983</td>
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<tr>
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<td>3,187,510</td>
<td>27,226</td>
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<tr>
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<tr>
<td>February</td>
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<td>4,820,596</td>
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<tr>
<td>May</td>
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<td><strong>Total estimated interest earnings</strong></td>
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Table VIII

Method Three

<table>
<thead>
<tr>
<th>Annual Average Cash Balance</th>
<th>$3,260,513</th>
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<tr>
<td>Formula: Average annual balance x 9 3/4%</td>
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</tr>
<tr>
<td>Estimated interest earnings</td>
<td>$317,900</td>
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</tbody>
</table>
SUMMARY

The projected annual interest earnings of Portage Public Schools for the 1979-1980 school year are:

Method One - $308,000
Method Two - $314,000
Method Three - $318,000

It is possible, depending upon actual rates available during the coming year, that anywhere from $300,000 to $325,000 could be earned in 1979-1980 from interest.

In the 1978-1979 school year, $401,470 were earned in interest. In July through October of 1978, the interest rates were from 7% to 8%. In November, interest rates began climbing and by January and February, the rates were from 10% to 11%. The school district had the largest amounts of cash to invest during January and February due to tax collections. For example: $2,017,425 was invested at 10.552% on January 19, earning $10,000; $2,027,478 was invested at 10.546% on February 5, earning $8,900; $2,100,000 was invested at 11.18% on February 20, 1979, earning $84,000. These high earnings resulted in large total earnings in January and February ($178,221) from interest. Interest rates remained at 10% to 11% until June.

It is projected that interest rates in the coming year will begin dropping from 10% to around 9% by June, 1980. This drop in interest rates accounts for the lower earnings on investment projected for 1979-1980.
REFERENCES
