A Report of an Internship Experience with the Grand Rapids Public Schools Grand Rapids, Michigan

Upton

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A REPORT OF AN
INTERNSHIP EXPERIENCE
WITH THE GRAND RAPIDS PUBLIC SCHOOLS
GRAND RAPIDS, MICHIGAN

by
William D. Upton

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

Western Michigan University
Kalamazoo, Michigan
December 1977
A REPORT OF AN
INTERNSHIP EXPERIENCE
WITH THE GRAND RAPIDS PUBLIC SCHOOLS
GRAND RAPIDS, MICHIGAN

William D. Upton, Ed.S.
Western Michigan University, 1977

This report describes an internship completed at the Business Affairs Office, Grand Rapids Public Schools, Grand Rapids, Michigan, in the summer of 1977.

An internship in the Business Affairs Office was chosen to enrich the intern's conceptual, human, and technical skills pertaining to school business and finance management. The intern actively participated in the daily activities and responsibilities of each of the nine departments which compose the Business Affairs Office. He had the opportunities to confer and interview the department heads and to observe the daily functions of each department. In addition, the intern assisted in the organization and instruction of Western Michigan University's Continuing Education Class, School Business Management.
ACKNOWLEDGEMENTS

I would like to express appreciation to Dr. James J. Gallagher for an exciting and provocative experience. I would also like to thank the entire staff of the Business Affairs Office who were most helpful throughout my internship. I would like to thank Phillip E. Runkel, Superintendent, for allowing me the opportunity to work in and study the Grand Rapids Public Schools' Business Affairs Office. These individuals made my internship the inspiring and valuable experience that it was.

I would also like to thank Dr. James Davenport for his encouragement and consultation.

Appreciation is also extended to Dr. and Mrs. M.J. VanderBrook for their contributions to the successful completion of this project.

Finally, I would like to add a special thanks to my wife, Marti, for her continued support, encouragement, constructive criticism, love, and understanding.

William D. Upton
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CHAPTER I

INTRODUCTION

Early civilizations transmitted skills and knowledge of crafts from one person to another by direct instruction whereby an experienced person passed his skills and knowledge onto a novice who, after a period of apprenticeship, advanced through varying stages until he too became a master of the trade. The apprenticeship or internship experience has not been restricted to craftsmen. Indeed, it has been the vehicle for instruction in medicine, law, education and other fields. Ancient temples taught religion and art, armies trained soldiers, private schools instructed statesmen, and the industrial class developed an intricate apprenticeship system which has developed into a business social system (Steinmetz, 1966).

The value and importance of such a training experience takes its cue and can be summed up in an old Chinese proverb: I hear and I forget; I see and I remember; I do and I understand.

Under the guidance of Dr. James J. Gallagher, Assistant Superintendent of Business Affairs, Grand Rapids Public Schools, I was afforded an internship experience in a large school district's business office which served
to improve and broaden my conceptual, human, and technical skills pertaining to school business and finance management and to strengthen my educational leadership abilities. The objectives in my prospectus were met and are outlined in detail in the following Specialist Project Paper.
CHAPTER II

PROSPECTUS

SPECIALIST INTERNSHIP

INTERN:
William D. Upton, 376-40-6935

SPONSORING ORGANIZATION:
Grand Rapids Public Schools

FIELD SUPERVISOR:
Dr. James J. Gallagher, Assistant Superintendent,
Business Affairs, Grand Rapids Public Schools

UNIVERSITY ADVISOR:
Dr. James Davenport, Department of Educational
Leadership, Western Michigan University

MAJOR FOCUS OF EXPERIENCE:
An internship in a large school district's central
distance, will serve to improve and broaden conceptual, human,
and technical skills pertaining to school business and
finance management relative to strengthening educational
leadership abilities.

DURATION:
Six weeks, commencing Monday, June 20, 1977

RATIONALE:
The effective public school administrator must have
an extensive knowledge of school business and finance. Ris-
ing inflation, widespread lack of community support for schools, declining enrollments, and diversity of funds all help to contribute to the complexity of the administrator's responsibilities. Thus, he requires an in depth knowledge of school business and finance procedures. Three main aspects of this knowledge should include competency in conceptual, human, and technical skills relative to public school business and finance.

The first aspect, conceptual skills, must include an understanding of the totality of the whole educational system as well as an appreciation for each of its intricate parts. Therefore, he must perceive the goals of the district while maintaining harmonious relationships with different groups and departments within the district. The business administrator must further be able to develop and use ideas effectively.

The second aspect, human skills, includes the ability to work effectively with people and groups, and to understand their needs so as to foster the most productivity from them. The successful business administrator must also be able to communicate satisfactorily with his fellow workers, school staff, and the community.

The third aspect, technical skills, includes specialized knowledge in the following areas: 1) accounting and finance; 2) computer data processing; 3) purchasing and supply management; 4) school operation and
maintainance; 5) school buildings and construction; 6) liability and insurance; 7) foods service; 8) transportation; and 9) basic school law. The success of an administrator, as well as the school district, will be determined largely by the administrator's ability to employ these skills effectively.

One final aspect of the business administrator's training, often overlooked, is his professional conduct. Because the business official represents the school district in his transactions with the community, business firms, other school districts, etc., he must always display high standards of ethical conduct.

With the aforementioned aspects of the business administrator's knowledge in mind, the present internship was structured to: 1) permit the intern to gain an overview of the existing financial situation as it applies in the Grand Rapids Public Schools; 2) enable the intern to develop, broaden, and practice conceptual skills; 3) enable the intern to develop and internalize human skills; 4) enable the intern to develop methods, procedures and an understanding of technical skills of a large school district; and 5) enable the intern to strengthen leadership and decision-making abilities.

In the course of this internship experience, it is expected that the intern will come into direct contact with and acquire a general knowledge of the technical skills
of the business and finance administrator. An internship in a large educational administrative structure such as the Grand Rapids Public Schools will be complemented by many other experiences that will add greatly to the value of the internship.
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<tr>
<td>1. Review information pertaining to the GRPS relative to conceptual, human, &amp; technical skills.</td>
<td>Observe, analyze &amp; discuss skills by working with trained staff members at the GRPS.</td>
<td>Address questions relative to conceptual, human &amp; technical skills.</td>
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<td>2. Acquire increased understanding of the operation of a large school administrative structure, &amp; in particular, of its business administrative operations.</td>
<td>Observe day-to-day working relationships; discuss concerns &amp; operations of various functions with staff members as appropriate.</td>
<td>Identify general administrative structure &amp; line relationships including the Board; discuss functions of a business administrator.</td>
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<td>3. Acquire an increased understanding of the operations of a school district's management-team concept.</td>
<td>Observe day-to-day management-team concept in operation; discuss concerns of management-team concept with staff members.</td>
<td>Discuss general structure of management-team concept &amp; how it functions in a large school.</td>
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<td>4. Acquire increased understanding of the legal status of business administrative operations in a large school.</td>
<td>Observe day-to-day working relationship; discuss concerns &amp; operations with staff members.</td>
<td>Indicate the general structure &amp; the legal status of business administrator.</td>
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<tr>
<td><strong>1. Observe the process of working effectively with people &amp; groups to foster productivity.</strong></td>
<td>Observe &amp; discuss skills on a day-to-day basis with staff members.</td>
<td>Identify the use of effective leadership styles &amp; models relative to working with people.</td>
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<td><strong>2. Improve ability to understand people &amp; how they work together.</strong></td>
<td>Observe &amp; discuss human relationship skills on a day-to-day basis with staff members.</td>
<td>Identify human relationship skills that are effective in working with individuals &amp; groups of people.</td>
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<td><strong>3. Use that understanding of people to motivate them to work as individuals &amp; in groups.</strong></td>
<td>Observe, discuss &amp; practice human relationship skills while participating in the internship experience.</td>
<td>Develop human skills to motivate individuals &amp; group members to work more productively.</td>
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<td><strong>4. Observe communication skills utilized by business administrators in the GRPS.</strong></td>
<td>Analyze behavior of staff in relation with business administrators.</td>
<td>List ways to work most effectively with fellow workers, staff, &amp; community.</td>
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<td><strong>5. Observe professional &amp; ethical conduct of staff.</strong></td>
<td>Observe behavior of staff in relation to professional conduct.</td>
<td>List standards of conduct observed &amp; discussed.</td>
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<tr>
<td>Technical</td>
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<td>1. Develop increased expertise in the use, understanding, &amp; employment of the major technical skills of a business administrator.</td>
<td>Examine annual reports, audit data, budget, &amp; organizational materials; meet &amp; discuss skills with department heads.</td>
<td>Cite experiences &amp; reasonably demonstrate an increased proficiency in technical skills.</td>
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<tr>
<td>2. Develop increased knowledge of methods, procedures, and an understanding of technical skills of a large school district.</td>
<td>Observe the use of methods &amp; procedures of technical skills by staff members.</td>
<td>Discuss knowledge acquired relative to methods, procedures, &amp; understanding of technical skills.</td>
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<td>3. Strengthen leadership &amp; decision-making abilities.</td>
<td>Analyze &amp; internalize technical experiences encountered throughout the internship.</td>
<td>Discuss strengths acquired for leadership &amp; decision-making.</td>
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CHAPTER III

DAILY LOG

This log presents a day by day summary of experiences obtained during the six week internship in the Business Affairs Office of the Grand Rapids Public Schools. Prior to the internship, I met with the Organizational Supervisor several times to determine goals and objectives and to obtain information relevant to the district's business office.

During the course of the internship I worked a regular work day. The internship also provided the opportunity to attend executive functions, including breakfast and luncheon meetings, committee and cabinet meetings, and school board meetings. In addition, I was able to assist in the organization and instruction of Western Michigan University's Continuing Education Class, School Business Management, taught by the Organizational Supervisor.
A REVIEW OF THE FIRST WEEK OF THE INTERNSHIP

(June 20-25, 1977)

During the first week of the internship I was assigned to the Supervisor of Supply and Purchasing to receive an overview of supply operations, purchasing, maintenance, and transportation.

Monday, June 20, 1977

I was introduced to the staff of the Central Warehouse Service Building. My objective for the day was to observe and discuss the process of supply operation.

The supply operation requires adept communication and cooperation for the smooth flow of receiving, accounting, and distributing school supply items. The process is also dependent upon forms such as the supply request, the purchase order, the transfer order, and the received in good order form. Inventory control is maintained by computer. An accurate accounting of minimum and maximum supplies can be determined instantaneously.

The computer also stores information on vendors and their qualifications. A vendor must be a financially responsible business organization offering equipment, supplies, or services required by the school system. The address, telephone, last purchase, and cost of the last purchase are stored in the computer for instant use on the
vendor file list.

After touring the warehouse and talking with different personnel, I spent the remainder of the day reviewing instructions for ordering supplies.

Tuesday, June 21, 1977

I met with Dr. Gallagher at his office to be introduced to his staff. A work schedule of my internship was distributed among his staff members. The previous Board of Education decisions relating to the Business Affairs Office was also discussed at the meeting.

Following the business meeting was a negotiations meeting involving the Grand Rapids Public Schools' Employees' Benefit Association's new three year contract. This is one of five collective bargaining units in the Grand Rapids Public Schools.

Next I met with the Director of Supply. We discussed the computer procedures relative to stocking, ordering, and requesting supplies from the central warehouse. We also discussed reliability and how it has improved with the incorporation of the computer into the central warehousing procedures. And finally, we discussed the problem of the local vendors and their pressures on the Grand Rapids Public Schools to buy their merchandise.

After lunch I met with the Director of Maintenance and Operations. We discussed short and long range plan-
ning, budgets, recordkeeping, and types of building repairs. We further discussed school fire safety and methods of preventing school property damage.

Wednesday, June 22, 1977

The Director of Maintenance and Operations and I met to discuss and observe construction sites for swimming pools, buildings and parking lots, and facilities for garbage pick up.

A topic of considerable discussion was the procedures and financing of new school construction. We also discussed Grand Rapids Public Schools' eight year capitol improvement program and the sources of funding. We discussed the citation report for the Union Senior High School from the Michigan Department of Labor Bureau of Safety and Regulations.

Another topic of discussion was energy saving techniques utilized by the Grand Rapids Public Schools. A full energy consumption report was presented at the July 5, 1977 Board of Education meeting.

Thursday, June 23, 1977

Today I visited the Gerold Ford Physical Education Center completed in 1977. Some work was completed by the Grand Rapids Public Schools' Maintenance Department such as the cabinet making. Also, I visited the new
Lincoln Center Building to inspect a leak in the swimming pool.

I attended a meeting with the chief officer of Operational Support Services to discuss results of negotiations for the Grand Rapids Public Schools' Employees' Benefit Association.

Next I met with the Director of Operational Supply to discuss the Operational Department's responsibilities such as custodians, grounds personnel, sanitation, building cleanliness and appearances, heating plant operation, building security, and distribution of supplies and equipment.

Friday, June 24, 1977

I spent the day with the Supervisor of Transportation. We discussed and observed the transportation process and management. We discussed training, equipment, school bus driver problems, handling of special education children, bus communications, bus maintenance, vandalism, and bus drivers. I was provided with a Handbook for School Bus Drivers, and other data.
A REVIEW OF THE SECOND WEEK OF THE INTERNSHIP

(June 27-July 1, 1977)

The schedule for the second week included assignments to food services, central office purchasing, and insurance.

Monday, June 27, 1977

This morning I met with Dr. Gallagher to discuss the law concerning employee unemployment, comparisons between large and small school districts, and the political atmosphere in the school system.

Next I was to meet with the Director of Food Service. However, the director was delayed because of a personnel problem, so I read materials on Class A lunches and job descriptions until he arrived.

Upon his arrival we discussed his responsibilities and training, menu development, employee evaluations, special function requests, vendors, bidding, and legislation for lunch and milk programs.

In the afternoon I surveyed some professional literature used by the Director of Food Services.

Tuesday, June 28, 1977

I spent the morning observing the preparation of 2200 lunches for the summer school program. It was a Type A
cold lunch composed of a sandwich, potato sticks, fruit cocktail and milk. Each lunch was individually loaded and wrapped by thirteen employees. The lunches were placed in baskets and distributed to individual elementary park schools. The process required tremendous teamwork among the employees. After observing the lunches being distributed to the elementary schools, I returned to the food service director's office where we engaged in discussions about the yearly contract with the State Department of Education, program organization and management, and the financial cost of the food service operation.

6:30 - 9:00 PM School Business Management Class

This evening Dr. Gallagher began instructing a class for Western Michigan University in School Business Management in which I volunteered to assist. He outlined some characteristics of a successful business manager. Some of his main points included the importance of the business manager to: 1) share ideas; 2) have integrity; 3) set the overall example; 4) enjoy the job; and 5) have a good retrieval system for storage of information.

The evaluation process and the Michigan property tax were also discussed. Many useful handouts were distributed to the class on subjects pertaining to business management.

Wednesday, June 29, 1977
I spent the morning at a finance committee meeting. The agenda included budget transfers, long term disability update, Board of Education agenda, purchases of instructional supplies and equipment, support materials, and supply inventory.

Next I met with the Director of Purchasing. There I became acquainted with his staff, observed reprographics and word processing, and learned of the organizational structure of the entire Purchasing Department.

Thursday, June 30, 1977

I spent the day with the Director of Purchasing observing and discussing bidding procedures, purchase orders, job responsibilities, local supplies, conflict of interests, motor pool, car fleet, and the use of computers.

In the afternoon I priced and ordered photographic technology equipment for the Junior College.

6:30 - 9:00 PM School Business Management Class

Tonight's class was mostly lecture describing the historical and philosophical setting and areas of responsibility of the Michigan property tax.

Friday, July 1, 1977

Today I met with the Supervisor of Insurance and Employee Benefits to discuss and observe information on workmen's compensation, job descriptions, insurance pre-
miums, accidents to employees, payroll deductions, insurance
bid specifications on long term disability and life insur-
ance, and parking ramp operations. I learned that the
Grand Rapids Public Schools attempts to self insure when-
ever possible and rehabilitate its workers.
A REVIEW OF THE THIRD WEEK OF THE INTERNSHIP

(July 5-8, 1977)

The third week of the internship I was scheduled to work with the Supervisor of Payroll.

Tuesday, July 5, 1977

Today was considered a variable holiday for most employees. However, the Business Affairs Office was scheduled to work. I attended a cabinet meeting made up of the Superintendent and his assistants.

In the evening the School Business Management Class met at the Board of Education meeting. The order of business was election of officers, presentation from the floor, reports from the Superintendent, the secretary's report, presentations from employee groups, etc.

Wednesday, July 6, 1977

The remainder of the week I was scheduled to work in the Payroll Department. This morning I reported to the Supervisor of Payroll to discuss and observe the payroll process which included: 1) procedures and time schedules; 2) employee time reports; 3) payroll recap reports; and 4) other information. Also discussed were changes in federal income tax withholding and changes in the newly settled Employee Benefits Association contract relative to payroll.
Thursday, July 7, 1977

Today I learned of the computer's value in the Payroll Department, as a payroll period results with the issuing of some 7,000 checks. The computer is also used for determining employees' sick leave and vacation time, and stop payments. I also discussed with the Payroll Supervisor the management and supportive staff salaries and the process of double checking on payroll checks.

6:30 - 9:00 PM School Business Management Class

The class reviewed the July 5 Board of Education Meeting. We also discussed the role of the school business administrator. Organizational structure was another topic of discussion.

Friday, July 8, 1977

Today was payday, and I was able to observe the individuals who had complaints concerning their payroll checks. Typical problems included incorrect amounts or nonpayment of checks. The teleprocessor proved to be of great assistance because of its ability to recall stored payroll information.

I attended a luncheon meeting with the Michigan Department of Education Title I officers and the Grand Rapids Public School officers at Sunny Brooke Country Club.
A REVIEW OF THE FOURTH WEEK OF THE INTERNSHIP

(July 11-15, 1977)

The fourth week of the internship I was scheduled to work in the General Accounting and Special Fund Accounting Departments.

Monday, July 11, 1977

This morning I observed the negotiation process for the secretaries. The Assistant Superintendent of Employee Relations negotiated for the Grand Rapids Public Schools while the secretaries had a lawyer representing their interests. A tentative agreement was reached by both parties by noon.

The remainder of the day I spent with the Director of General Accounting to discuss general fund accounts.

Tuesday, July 12, 1977

Today I attended a meeting to discuss the rotation of auditors. Some thoughts and ideas relative to the advantages and disadvantages of the process were presented. Following the meeting, I reported to the General Fund Accounting Department where we discussed evaluation of secretaries, calendars, contracts, and the use of school buildings.

Later in the day the Assistant Superintendent of
Business Affairs arrived requiring accurate information concerning cost factors for the secretaries who recently settled their contract. The Director of General Accounting and myself figured the salary increase.

I attended an afternoon meeting in the Assistant Superintendent of Business Affairs' office to discuss Michigan State Aid and Section #53.

6:30 - 9:00 PM School Business Management Class
The topics of discussion for the evening included school consolidation, investments, planning, and budgeting.

Wednesday, July 13, 1977
I met with the Director of General Accounting and Payroll Operations again today. We discussed the new #1022 code system for general fund accounting which he helped develop. We also discussed terminology and the dual 'T' accounting system used in school finance.

In the afternoon I met with the Assistant Superintendent for Business Affairs to discuss the previous nights class.

Thursday, July 14, 1977
This morning I met with the Supervisor of Special Funds. He has the responsibility of 120 state and federally funded programs.

In the afternoon we met with the administrative
teams to discuss compensations and level changes for the ensuing year. The administrative teams do not believe in automatic raises for administrators.

6:30 - 9:00 PM  School Business Management Class

We discussed the following: 1) assessment rolls; 2) definition of terms; 3) millage rates; and 4) property taxes for funding education.

Friday, July 15, 1977

Today the Supervisor of Special Funds and I discussed the importance of keeping current with the many government programs. He recommends a membership in the "Michigan Association of State and Federal Program Specialists", which supplies current information at regular intervals. We also discussed C.E.T.A., Chapter III funds, and Title I.
A REVIEW OF THE FIFTH WEEK OF THE INTERNSHIP

(July 18-22, 1977)

The fifth week of the internship I was assigned to work in Investments and Data Processing.

Monday, July 18, 1977

This morning I met with the Supervisor of Accounts Payable, Investments and Internal School Accounts. We discussed instruments of the money market such as commercial paper, treasury bills, repurchase agreements, and certificates of deposit. We also discussed: 1) school policies of regulating investments; 2) school code of safe keeping of public monies; 3) record keeping; 4) buying, selling, and loaning investments; 5) checking accounts; 6) safe keeping receipts; and 7) accounts payable.

A good investor can stretch tax payers' money considerably. The Grand Rapids Public Schools averages approximately two additional mills per year through the use of wise investments.

Tuesday, July 19, 1977

This morning we discussed the 400 activity accounts and the computer's role in aiding investments. We also discussed: 1) the supervisor's training and his responsibilities; 2) the necessity of reading the Wall Street
Journal for information on money rates; 3) the 1975-76 audit report; 4) problem areas in accounts payable and investments; and 5) internal school auditing.

Later in the morning there was a meeting with the Assistant Superintendent of Business Affairs to discuss a discrepancy in an internal school account. According to the School Code Law #750.40, there was a case of improper use of school funds.

The afternoon was spent investigating the advantages and disadvantages of decentralized accounts in the elementary schools and the safe guarding of public funds.

6:30 -9:00 School Business Management Class

There were presentations given to the class by:
1) The Director of Accounts and Pay Operations; 2) The Director of Purchasing; 3) The Supervisor of Insurance and Employee Benefits; and 4) The Supervisor of Special Funds. Each person reviewed his speciality position in the Grand Rapids Public Schools.

Wednesday, July 20, 1977

This morning I met with the Assistant Director of Systems and Programming of the Data Center. We discussed his responsibilities and training. We also talked about the computer and teleprocesser operations. The computer is an IBM 370 System, Model 145, with a Cambridge memory. The original system has add-on capabilities.
Later this morning a meeting in the Data Center was scheduled to discuss data word processing services for special education students.

In the afternoon I attended a meeting at the Kent Intermediate School District to discuss the pricing of accounting procedures for other service districts.

Thursday, July 21, 1977

Today I met with the Assistant Director of Data Operations. We discussed: 1) technical training; 2) capabilities of data processing; 3) operational requirements of the technology; 4) coordination and planning; 5) computer limitations; 6) selling and cost of services; and 7) computer forms.

In the afternoon I attended a meeting with the Assistant Superintendent of Business Affairs to discuss the adoption of the 1022 computer system for the Grand Rapids Public Schools.

6:30 - 9:00 PM School Business Management Class

The following topics were discussed: 1) providing transportation for administrators; 2) planning for personnel administration; 3) negotiations; 4) auditing and reporting; 5) insurance planning; 6) purchase inventory control and distribution; and 7) conquering the panic of change.
Friday, July 22, 1977

Today I met with the Data Base Auditor. We discussed the purpose of internal auditing which is a relatively new field for public schools. We also discussed security, justification, threatening, and the hazards of independent audit and control. The internal auditor is the check and balance control for budget and management. The office also reports improper reporting, funds handling, use of school insurance, worker compensation, etc.
A REVIEW OF THE SIXTH WEEK OF THE INTERNSHIP

(July 25-29, 1977)

The final week of the internship was spent entirely in the Office of the Assistant Superintendent of Business Affairs.

Monday, July 25, 1977

This morning I met with the Assistant Superintendent of Business Affairs. We discussed his responsibilities and office arrangement. We also discussed the cost allocation plan for the Grand Rapids Public Schools and time saving devices.

Next we attended the Superintendent's cabinet meeting. Topics of discussion included: 1) employee relations; 2) the upcoming Board of Education Meeting agenda; 3) construction of school buildings; 4) operations; and 5) business affairs.

Later I attended a planning meeting with the Assistant Superintendent of Business Affairs to prepare for the upcoming finance committee meeting.

Tuesday, July 26, 1977

This morning we met first with the finance committee to discuss Board of Education agenda items and to determine future meeting dates. This was the first meeting of the
new finance committee since the election of the new Board of Education members.

We then met with the Assistant Superintendent for Instruction to discuss the 1977-78 budget.

Next we met with the Superintendent of Schools to discuss property sale and the resignation of an employee. Then we met with the Affirmative Action Committee to discuss an upcoming luncheon with minority contractors. The next meeting was with the Administrative Assistant to check phone calls, meeting schedules, and planning.

Finally we met to discuss the divisional budget request for 1977-78. We attended subsequent meetings to discuss planning department budgets and divisional budget requests for 1977-78.

6:30 - 9:00 PM  School Business Management Class

We listened to reports on: 1) accounting procedures; 2) preparation of budgets; and 3) financing public education.

Wednesday, July 27, 1977

The Assistant Superintendent of Business Affairs and I met to review the Grand Rapids Public Schools' State Aid Financial Status Report as of June, 1977, and the budget workbook.

Next we drove to Kalamazoo to meet with Western Michigan University's Educational Leadership Department
Head for lunch to discuss the progress of the School Business Management class.

The remainder of the day I read, Public School Fund Accounting Principles and Procedures.

Thursday, July 28, 1977

This morning I attended a breakfast meeting to discuss the resignation of an employee. Next I attended a business affairs staff meeting. Topics of discussion included: 1) teleprocessing equipment for the Junior College; 2) data processing cost distribution, 1976-77; 3) data center hourly salary plan; 4) update on governmental service programs; and 5) briefing for the School Business Management Class, July 28.

Next we met in the Board Library for a Minority Businessmen's Luncheon. Introduction of staff, presentations, and questions were on the agenda.

In the afternoon the Assistant Superintendent of Business Affairs and I met in general discussion concerning: 1) differences between a manager and an administrator; 2) centralized/decentralized management; 3) differences between administrators and managers; 4) internships; and 5) level of management salary range.

6:30 - 9:00 PM School Business Management Class

I filled in for the Assistant Superintendent of Business Affairs who had an out of town business meeting.
The data center project managers presented materials concerning: 1) historical information; 2) teleprocessing; and 3) computer operations. We also had a demonstration of the teleprocessor and a tour of the computer room.

**Friday, July 29, 1977**

Today was the final day of the internship. I had an opportunity to ask some final questions, collect information, and express my appreciation to the Assistant Superintendent of Business Affairs and his staff.
CHAPTER IV

LEARNING AND SKILLS DEVELOPED

Objective A-1: To review information pertaining to the Grand Rapids Public Schools relative to conceptual, human, and technical skills.

I was provided with the opportunity to observe, analyze, and discuss conceptual, human, and technical skills with trained specialists at the Grand Rapids Public Schools' Business Affairs Office. To enable myself to address questions relative to conceptual, human, and technical skills at Grand Rapids Public Schools, I participated in management meetings, and I collected and read various reports, budgets, and policies connected with the Grand Rapids Public Schools.

The extent of this paper will be to reveal the information gained pertaining to the conceptual, human, and technical skills while interning at Grand Rapids Public Schools.

Objective A-2: To acquire an increased understanding of the operation of a large district's administrative structure, and in particular, of its business administrative operations.
Throughout the internship I was in contact with various administrative staff including each of the nine department heads which compose the Business Affairs Office. I also attended Board of Education meetings. This allowed me to identify the administrative structure and line relationships. Furthermore, the organizational chart of the Business Affairs Office, class discussions, and readings significantly aided me in obtaining this objective. (See Appendix A)

The nine directors and supervisors report directly to the Assistant Superintendent of Business Affairs. He, in turn, reports directly to the Superintendent of Schools. Although the organizational chart has limitations, it still presents a graphic view of functions, relationships, position levels, and responsibilities within the Business Affairs Office. The main purpose of the organizational chart is to clarify structure. (See Appendix A)

The Grand Rapids Public Schools is a second class school district whose board consists of nine members elected from the school district at large. The members do not receive compensation. A reorganizational meeting is held in July to elect officers. The Grand Rapids Board of Education further consists of several committees: 1) The Executive Committee; 2) The Community Relations-Junior College Committee; 3) The Education Committee; 4) The finance Committee; and 5) The Joint Conferences with the City Commis-
sion: Executive Committee. (See Appendix B) The Committee is where the majority of the policy making is conducted. The meetings are open to the public and press for those who wish to attend.

The function of the business administrator is extensive and is partially illustrated in the organizational chart. (See Appendix A) The responsibilities often associated with the business administrator are financial planning, accounting, auditing, purchasing and supply management, school plant planning and construction, maintenance of plant, real estate management, permanent property records and custody of legal papers, food service operations, insurance, cost analysis, reporting, data processing, Board policies and administrative procedures as related to fiscal and noninstructional matters, elections and bond referrals, school assessment, and levy and tax collection procedures as may be set by law. The responsibilities vary from district to district. Another important function of the business administrator is to predict the economic future and anticipate the outcomes based on estimated facts. The major administrative processes include planning, leading, controlling, and organizing. The business administrator retains a high level of responsibility within a school district.

The business administrator requires conceptual, human, and technical skills to be successful. He performs as a
line officer for the superintendent which makes the principals directly responsible to him for business affairs in their individual schools. He acts as an advisor for technical assistance and establishing business procedures.

The business administrator is obliged to provide information and consultation to other groups such as the Board of Education, certain committees, teacher groups, community groups, and the community at large.

The business administrator's responsibilities to the superintendent include: 1) advice concerning revenues and expenses; 2) recommendations of policy and procedures; 3) control of budget; 4) leadership for the finance committee; and 5) evaluation of programs and procedures.

Objective A-3: To acquire an increased understanding of the operations of a school district's team-management concept.

The team-management concept in the Grand Rapids Public Schools promotes for a democratic operation of schools and the involvement of staff in administrative recommendations and decisions. A successful team-management program involves decision-making and is dependent upon close working relationships. My day to day observations revealed that team-management is an asset to the superintendent in a school district the size of the Grand Rapids Public Schools.

The Assistant Superintendent of Business Affairs en-
courages team-management among his staff. I attended several meetings in which he gained valuable information from his staff which he used to arrive at decisions. I observed its use in the purchase of data center equipment, the misuse of public funds, and in budget reviews.

A successful team-management process is dependent upon thorough planning, a sound organizational structure, and a trusting relationship. The resulting factor is the efficient, effective, quality decisions that are derived from the process.

Objective A-4: To acquire an increased understanding of the legal status of business administrative operations in a large school district.

The legal status of the business manager is determined by state statutes and Board approved policies and regulations. The school board, according to Michigan statutes for second class districts, may appoint a person and designate to him the responsibility of management and control of purchases, contracts, and other business matters.

A business manager acts as an agent for the Board of Education, and his authority is limited to certain bounds. The Board of Education may authorize the administrator to expend the appropriate amounts, and limit amounts to be expended to a specified sum by policy or definition.
The Grand Rapids Public Schools has adopted the "Davies-Brickle System", by Croft Educational Services, Inc., 1970, to guide their policies and regulations relative to school business management.

**Objective B-1:** To observe the process of working effectively with people to foster productivity.

The Assistant Superintendent of Business Affairs is an extremely dedicated, hard working, ambitious individual who enjoys his work. Apparently, he feels that his work is a source of stimulation and challenge. Prior to coming to the Grand Rapids Public Schools, he spent 25 years at a private company as a manager and accountant. He has been in education for only seven years. He has combined industrial management and educational management techniques which has been successful for him. Educational leaders are basically generalists; private industrial managers tend to be specialists. This comparison is important because it influences the general make up of the Grand Rapids Public Schools' Business Affairs Office. As staff resigned or retired, the Assistant Superintendent of Business Affairs was able to rebuild his staff to his own specifications and expectations in which he felt he would achieve the most productivity. He hired specialists as his supervisors and directors. For example, he hired CPA accountants, investment specialists,
data operators, and system programmers as his department heads.

I observed that the Assistant Superintendent of Business Affairs allowed a reasonable degree of freedom for his department staff in which people worked effectively and efficiently. He provided his staff with opportunities for decision-making. He also made available for his staff the use of the latest technological and electronic equipment. Another aspect that lends to productivity is the organizational structure of the Business Affairs Office. (See Appendix A) The subunit design provides for small units within the business department and allows for personal and meaningful, free-standing work teams. Dr. Gallagher further sets the example for his staff by his dedication and ambition towards his work. I believe these policies allow for a productive climate in the Business Affairs Office.

**Objective B-2:** To improve ability to understand people and how they work together.

The Assistant Superintendent of Business Affairs at Grand Rapids Public Schools has nine directors and supervisors as well as an administrative assistant under his direction. (See Appendix A) Each director and supervisor in turn has several staff members. The ultimate responsibility, of course, belongs to the Assistant Superintendent of Business
Affairs. Such a large staff is dependent upon an efficient, effective manager who also understands his staff. The staff members confided to me that they felt the Business Department was the best organized and operated of all the departments in the school system which indicated satisfaction with the management of the department.

The Assistant Superintendent of Business Affairs believes in being frequently visible to subordinate workers. Some methods he employed to aid in meeting the expectations of his staff were: 1) conducting meetings for luncheons and breakfasts; and 2) frequently working around the department and visiting with staff during breaks. These methods appeared to reinforce the security of the subordinate workers.

Another effective process that is used in the Business Affairs Office is task-grouping. The Assistant Superintendent of Business Affairs visibly used the process at all his staff and committee meetings in which he was the leader. The Superintendent of Schools also utilized this process. I believe this is an effective human relations skill in working with groups of people.

Objective B-3: To use that understanding of people to motivate them to work as individuals and in groups.

An important aspect of the business administrator's
responsibility is to provide a motivating work climate for his staff. Behavioral scientists have learned that rewards are tied to performance (Lawler III, 1977).

The Assistant Superintendent of Business Affairs at the Grand Rapids Public Schools believes that jobs must be meaningful, provide feedback, and that workers must be allowed some degree of freedom in their tasks. He also provides his staff with opportunities to grow and rise within the organization. And finally, he provides his workers with monetary rewards for work accomplishments beyond normal expectations.

Objective B-4: To use communication skills utilized by business administrators in the Grand Rapids Public Schools.

I observed some of these characteristics in the Assistant Superintendent of Business Affairs: 1) the ability to get along well with others; 2) the ability to listen; 3) the ability to render decisions; 4) the ability to accept criticism; 5) the ability to like people and show it; and 5) the ability to be a self starter.

Objective B-5: To observe professional and ethical conduct of staff.

A business administrator represents the school dis-
trict in his transactions with his staff, the community, business firms, and other school districts, etc. He must therefore display high standards of ethical conduct. He must be honest and loyal in his dealings with others. He must be fair, legally and morally right, as well as strive for excellence.

Through my observations, I am convinced that the Assistant Superintendent of Business Affairs at Grand Rapids Public Schools makes every effort to adhere to this professional code of ethics.

Objective C-1: To develop an increased expertise in the use, understanding, & employment of the major technical skills of a business administrator.

The Office of the Assistant Superintendent of Business Affairs is composed of nine departments. During the course of my internship I spent time in each department and observed their operations as follows:

Supply Operations & Central Office Purchasing

The supply operations and purchasing at the Grand Rapids Public Schools is big business. The centralized warehouse concept is an efficient and effective method of handling supplies and purchases in a large district. Furthermore, the Grand Rapids Public Schools uses the bid system, purchasing schedules, list of vendor qualifications,
and written specifications to maintain adequate supplies for the district at a substantial cost savings.

The Director of Purchasing is responsible for bidding procedures, the central warehouse, storage and distribution, centralized purchasing, purchasing schedules, vendor qualifications, conditions of contracts, deliveries, and payment of invoices.

Maintenance and Operation

A large school district requires a high degree of specialization in the Maintenance and Operations Department. A considerable savings is realized from being specialized.

The district uses long range planning techniques for modification and modernization of buildings in budget preparation. The budget is approximately 14% of the total budget, and it governs the extent to which maintenance and operation services can be provided to the district.

Transportation

The Grand Rapids Public Schools has approximately 160 vehicles composed of buses, vans, and station wagons that transport 20,000 children every day during the school year. Proper maintenance is a constant, ongoing process.

Several problems the Grand Rapids Public Schools' Transportation Department face are high absenteeism among bus drivers, bussing handicapped children, and maintaining
discipline on the bus.

**Food Services**

The school business administrator is concerned primarily with three aspects of the food service operation: 1) scope of activities; 2) organizational structure; and 3) maintaining a balanced budget.

In the Grand Rapids Public Schools, food service is big business. During the regular school year the district uses prepackaged and prepared meals with several satellite kitchens in the various school buildings. During the summer meals are provided for the park schools.

Some key factors in the successful operation of school food service programs are: 1) knowledge of community needs; 2) knowledge of legislation affecting financial assistance for food services; 3) knowledge of statutes regulating food service operations; 4) knowledge of Board of Education food service policies; 5) guidelines for organization and management of food service activities; and 6) provisions for adequate facilities and a competent staff.

**Insurance**

There are three basic elements necessary to build a sound insurance program in a school system. They are: 1) a careful determination of the risks to insure against; 2) provisions for maximum coverage at a minimum of cost; and
3) assurance of legal coverages so that premiums paid will guarantee payments. A business administrator should be aware of several areas of insurance: 1) types of insurance for schools; 2) Board policies on insurance; and 3) bidding procedures for insurance.

Insurance programs are becoming very costly for school districts, especially public liability, building, and fleet insurance. A business administrator will attempt to research the best affordable program for the district.

General Fund Accounting & Payroll

The Grand Rapids Public Schools stress the common principles of accounting to operate the general fund. These include: 1) investments of funds in securities; 2) computer posting on a daily schedule; 3) prompt deposit of all revenues; 4) recording incoming cash and checks on a daily basis; 5) reconciliation of general, building and debt fund bank statements; 6) a checklist to file all periodic reports; and 7) knowledge of Michigan's new decodification procedures.

The Payroll Department is the one department that is in contact with each employee every two weeks. The Grand Rapids Public Schools feels this department is a total service department. Responsibilities in this department include: 1) computer knowledge; 2) accuracy of reports and methods; 3) step-by-step check handling routines (security checks); 4)
maintenance of the check log; 5) reconciliation of payroll account; and 6) reviewing forms used in the payroll operation.

Special Fund Accounting

Special funding in the Grand Rapids Public Schools includes a considerable staff to write the program requests, carry out the requests, and collect and distribute funds. The Grand Rapids Public Schools has approximately 120 programs worth about ten million dollars of state and federal monies.

Accounts Payable & Investments

It is the responsibility of the Investments Department to stretch the taxpayers' dollars. Through investments in the money market and the shrewed buying and selling of treasury bills, commercial paper, and repurchase agreements, etc., the district has increased its revenues considerably.

Data Processing

School districts can save time and increase efficiency and accuracy in the use of computer technology. The expense of computer operations can be lowered by neighboring districts sharing the facilities and costs.

Some applications of computer service in the Data Processing Department are: 1) student records; 2) person-
nel records; 3) facilities and equipment; and 4) financial records.

Objective C-2: To develop an increased knowledge of methods, procedures, and an understanding of technical skills of a large school district.

The knowledge to be gained in a large district is not so different from a small district. In fact, the same methods, procedures, and technical skills that are necessary to operate a large district are used in a small district. The main difference in the school operation is the placement of the decimal point in the total budget. The size variable is handled according to the number of affordable personnel. In large districts, more specialists are used, whereas in small districts, workers are generalists; they are expected to assume more jobs. In retrospect, a generalist may have an uncanny perspective of how a school district truly operates because of the exposure to the many facets of running a school district. A specialist is mainly concerned with one or two operations, such as special fund accounting or insurance with virtually little or no exposure to curriculum, instruction, or maintenance.

Objective C-3: To strengthen leadership and decision-making abilities.
The technical experiences encountered throughout the internship will have an everlasting effect upon my personal management responsibilities. The new ideas and knowledge gained can be applied in my present position. I expect improvement in my time-management, efficiency, and effectiveness as a manager. The opportunity to work with such a highly skilled and knowledgeable manager has impressed upon me the need to review and master the basic skills and techniques of management. The intern experience has strengthened my leadership skills and my decision-making process. My level of confidence has gained a new horizon which will allow future progress in acquiring and using management skills to meet prospective challenges.
APPENDIX A

Organization Chart
Business Affairs Department
Grand Rapids Public Schools
APPENDIX B

Committees
Grand Rapids Board of Education
1977-78
Committees
Grand Rapids Board of Education
1977-78

Executive Committee:

Vernis L. Schad - President
Calvin W. Jeter - Vice President
Charles F. Porter - Treasurer

Community Relations - Junior College Committee:

Calvin Jeter, Chairperson
Dorothy Moser
Peter DeBoer

Education Committee:

Lawrence Pojeski, Chairperson
Linda Johnson
Vernis Schad

Finance Committee:

Charles Porter, Chairperson
Rosemary Alland
David Hartman

Joint Conference with the City Commission:

Executive Committee
REFERENCES


RELATED READINGS


