

A STUDY OF THE NEED FOR A COLLEGIATE MAJOR IN THE FIELD
OF PUBLIC SCHOOL BUSINESS MANAGEMENT

by

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CHAPTER I

INTRODUCTION

Within the memory of a great many persons, and certainly within the span of two generations, this country's schools have passed through such a rapid expansion in enrollment, curricula, and complexity of operation that one might refer to the entire process as revolutionary, rather than evolutionary.

Enrollments, reflecting the general pace of the nation's population in their steady increases, have exhibited spurts in their rate of climb which are remarkable. The most recent of these, beginning in the late 1940's, has been the cause for much concern on the part of educators: (1) on the basis of the resulting multiplicity of problems it has brought to the operation of the school system, and (2) on the basis of the public criticism that the handling of these problems by school administrators has produced.

Expansion of curricula has forced decisions on whether to develop terminal courses of study, college preparatory courses, or some compromise between the two, with little degree of assurance that the optimum had been reached.

Faced with the necessity of reconciling education with limited budgets, administrators have resorted to such measures as offering subjects on alternate years. However, this position has confronted them with the realization that they must either fit the curriculum to the student or be forced to fit the student into the curriculum.

The complexity of operation in the modern school system is compounded not alone by the foregoing educational problems, but also by a multitude of related problems result- in from this situation, the diversity of which may be beyond the scope of the school administrator. Among the many activities which have come to fall within the responsibility of many school administrators are:

- (1) Utilization of proper accounting procedures
- (2) Application of adequate auditing practices
- (3) A professional approach to purchasing
- (4) Accurate interpretation of contracts
- (5) Selection of insurance which affords the best protection to the school system
- (6) Maintenance of plant and equipment
- (7) Establishment of adequate inventory controls
- (8) Prudent investment of school funds.

These activities may be subjected to a layman-concept handling by the superintendent who perhaps is specialized in education alone and who may attempt to deal with them without recourse to the services of a specialist in those fields.

CHAPTER II

STATEMENT OF THE PROBLEM

Recognizing that school administrators often are faced with too large a task in dealing with both the supervision of instruction and the conduct of business affairs to do either efficiently, William Arnold, Dean of the School of Education, University of Pennsylvania, offers the opinion that ¹ "school business management is long overdue in gaining just recognition as a profession. Our professional schools have too long neglected to provide professional training opportunities in this area." It appears that efficient operation of the schools has come to require the services of specialists in business as well as education. The complexity and growth of the schools further suggest formal training for those business specialists who will be assisting the superintendent. The relationship of the dollar investment on schools and the training suggested for business managers is brought into focus by C. W. Hoff, of the University of Omaha ² when he points out that although operation of

¹"Review of 1956," School Executive, Vol. 76 (January 1957), p. 72.

²C. W. Hoff, "Education Program for College Business Managers," School and Society, Vol. 79 (June 12, 1954), pp. 184-6.

educational institutions involve billions of dollars in physical plant assets and annual expenditures, we have failed to provide professional training for business managers. "We have not developed the educational programs, internships, standards, and incentives for attracting, educating, placing and holding qualified college business managers."

Although the existence of such a need is acknowledged, as evidenced by the foregoing information, it remains to be determined if the need exists at the University of Arizona for a major field of study what will offer professional training for those preparing for school business management and make them less dependent upon the carry-over from education and experience in other areas. Therefore, the following statement of the problem was formulated:

According to needs as may be determined by public school superintendents and the duties of those practicing in the field of school business management as may be determined by public school superintendents, a need may be revealed for a collegiate major at the University of Arizona that will effectively prepare those selecting this profession for the responsibilities which they will encounter.

CHAPTER III

DEFINITION OF THE PROBLEM

The role which proper training plays for the business manager reaches even greater significance, if we are to accept Messrs. Bruce's statement³ that "In any school district the appointment of the business manager is, next to the superintendent of schools, the most important task of the board of education." The writers further suggested four criteria by which boards may be guided in making such appointments. It was noteworthy that the second of these was that the individual should have a college education. Additional support is given to this stand by the comptroller of the University of Illinois, Lloyd Morey, who recommends⁴ that business officers should possess a degree and feels that the field should be recognized as a profession in itself, with institutions of higher learning providing suitable training. Morey, who is also a professor of accounting, cautions that

³William C. and William G. Bruce, "Better School Business Personnel in Small Cities," American School Board Journal, Vol. 118 (April 1949), p. 52.

⁴Lloyd Morey, "College Business Management--As a Profession," School and Society, Vol. 76 (October 18, 1952), pp. 241-4.

experience in other fields of business, while valuable, may narrow the indoctrination of a person and lead to stress upon earning or showing a profit. School funds must be spent wisely, but education should not suffer from undue frugality. "Business management exists to serve the educational program by conserving resources, by providing accurate and up-to-date financial data, by actively supervising the auxiliary and service activities, and by shouldering as much as possible of the burden of business administration incident to educational operations."⁵ In short, ". . . the function of business administration is to serve the educational program."⁶

Sources of Data

To plan an effective investigation which would attempt to prove or to disprove the problem as stated, it was felt that much of the findings should have as their source those school officials who are principally responsible for determining the duties and responsibilities of the business manager. It would appear that the superintendents play a large role in determining the standards against which the formal education and occupational experience of applicants for the position of business manager might be measured.

⁵Ibid., pp. 241-4.

⁶Arthur H. Rice, "It leads to False Economies," Nation's Schools, Vol. 60 (October 1957), pp. 49-50.

The data provided by superintendents of Arizona school systems, supplemented by the data derived from superintendents of school systems located in other western states which may be served by the University of Arizona, and augmented by the writings of authorities in the field of school business management may serve as a basis of comparison with existing majors at the University of Arizona to determine if a major field of study is available which meets the needs suggested by the survey.

Delimitation of the Study

It is intended that this investigation should do no more than to indicate whether a need exists at the University of Arizona for a major in school business management. This will necessitate determining who are business managers, what are their duties, when does the school system first require the services of a business manager, why is he an asset to the school administration, and how are his educational and experience backgrounds related to his function as a member of the school administration. These findings then should point toward the solution of the problem as stated.

Values of Study

Although the scope of this thesis is not extensive, it is felt that certain values may arise from the investigation.

Should the results of the investigation produce a negative answer to the statement of the problem, it may at the same time bring forth facts which will be an indication of conditions that may develop in the future. If, on the other hand, the results of the investigation produce an affirmative answer, a step will be accomplished toward better educating students who wish to enter a rapidly growing profession. Conceivably, an improved school administration and better educational facilities at a lowered cost to the taxpayer could result from proper training of specialists in school business management.

Terminology

Throughout this thesis the term business manager will be used repeatedly. The business manager should be considered any employee of a school or school system within whose direct responsibility fall those school affairs which are exclusive of educational activities or instructional functions. He may supervise no other individual, or he may direct the activities of many employees in many departments, depending upon the school population. In most cases he reports directly to the superintendent, although, on occasion, he is directly responsible to the board and shares equal responsibility with the superintendent. A recent survey asked the question, "To whom to you report directly?" The question, one of several,

was directed to 1,758 Class A members of the Association of School Business Officials. Respondents, numbering 996, indicated in 53.3 per cent of the cases that the next higher level of authority was the superintendent. Another 26.4 per cent of the respondents, however, stated that they reported directly to the board, while 23.3 per cent of those who replied reported to both the superintendent and the board.⁷ In evaluating these answers it was pointed out the 17.3 per cent of the sample consisted of superintendents, which may have accounted for the rather high incidence of those business officials reporting directly to the board.

Titles for this official may vary from business manager to superintendent in charge of business affairs, director of non-instructional services, supervisor of business department, or simply the designation, business clerk. The survey quoted above⁸ was also concerned with the various designated titles for the school business official. The results showed that the title most frequently used was assistant superintendent. This was followed closely by the use of the title, business manager.

In this thesis, the term administrator will be used interchangeably with superintendent in reference to that

⁷"Business Officials are Educators," Nation's Schools, Vol. 62 (November 1958), p. 108.

⁸Ibid., p. 108.

school official in final authority who is responsible to the school board. School principals and business managers occasionally may be referred to as administrators, but only in such context as to preclude confusion with the term superintendent.

School population and enrollment will be used synonymously in discussing the number of pupils registered in a school system.

School system and school district are used interchangeably when reference is made to a school or a group of schools functioning as a unit under the control of a superintendent and a board of education.

Educational background refers to formal training received in public schools, business schools, night schools, colleges, universities or special training programs offering course work of quality comparable to that offered by any of the foregoing.

CHAPTER IV

SURVEY OF RELATED LITERATURE

The rate of growth and the complexity of operation of schools need not be judged only empirically. Statistical treatment of the condition has been both intensive and extensive. Literature quoted on the subsequent pages readily lends itself to analysis indicating an accelerated and unprecedented rate increase in school population. Accompanying this growth in enrollment has been an expansion in the administrative duties of superintendents which eventually could tax the capabilities of the most able of the school executives. As a solution, many administrators have sought recourse in specialization. The business manager, with his specialized education and experience, often has relieved the superintendent of much of his administrative burden and has made possible the superintendent's greater attention to instructional activities.

Results of Expanded Enrollments

Although conditions vary among schools, B. R. Oosting, the business manager for the Hinsdale, Illinois public schools and an editor for Nation's Schools, believes ". . . there is usually a point in a school system's population growth when

business affairs become so complicated that, from an economical point of view, it pays to employ a specialist."⁹ He further suggests, "A rule of thumb that may be applicable is that a school district needs a business manager when the enrollment of the district reaches a thousand pupils."¹⁰

Oosting's survey of 235 school systems in the 1,000 to 100,000 range of pupil enrollment where business managers are employed disclosed a median enrollment of 8,192 pupils.¹¹

The survey of J. A. Forner,¹² the assistant superintendent of Walled Lake Consolidated School, Walled Lake, Michigan, was concerned with the amount of time spent by administrators in the performance of business matters for the school. Results of the survey, which enjoyed the return of 93 per cent, or 388 questionnaires out of 416 distributed, indicated the consensus that business matters take too much of the superintendent's time away from educational duties and the supervision of instruction.

It would seem unnecessary to conclude a priori that the capabilities of school executives have limits. Evidence

⁹B. R. Oosting, "When Does a School System Need a Business Manager?" Nation's Schools, Vol. 59 (May 1957), p. 100.

¹⁰Ibid., p. 100.

¹¹Ibid., p. 100.

¹²J. A. Forner, "Medium Sized District Needs a Business Manager," Nation's Schools, Vol. 41 (May 1948), p. 32.

through experience may point to the need for assistance, not only to relieve the superintendent of unwarranted pressures resultant from expanded enrollments, but also to provide the level of administrative efficiency due the public in a tax-supported institution.

Need for Administrative Specialists

"A number of superintendents have been bogged down with added responsibilities and have suddenly found themselves unable to maintain close contact with classroom problems because of their new responsibilities in these other areas of administration."¹³ H. S. Miller, superintendent of Saydel Consolidated Schools of Des Moines, Iowa, continues by commenting about the "Director of Non-Instructional Services" and his background, "In many of his business contacts, educational considerations make it necessary for him [the superintendent] to use the skills of a trained professional person."

Further acknowledgement of the need for specialists to assist the superintendent is voiced by L. B. Ezell of the College of Education, University of Texas and B. T. Penn¹⁴ of the Odessa Public Schools, Odessa, Texas: "Many school

¹³H. S. Miller, "Assistance for the Administrator," American School Board Journal, Vol. 139 (August 1959), p. 19.

¹⁴L. B. Ezell and B. T. Penn, "Business Managers in Texas Schools," School Executive, Vol. 69 (May 1950), pp. 55-6.

systems are now so large and so complex that superintendents no longer have sufficient time to look after voluminous details of school business." However, the one section of Ezell and Penn's survey which bears most heavily upon the problem confronted by this thesis is that in which 45 of the 50 superintendents of Texas school systems, ranging from less than 1,500 to more than 10,000 school population, stated without qualification that the employment of a business manager had resulted in better business practices in their schools, while only two respondents gave negative replies to the question. A second question: "Has the office of business manager justified its cost in your school?" brought 48 positive replies and a single negative return.

Referring to the "sensationally successful" extension of the bounds of knowledge and its application, Arnold J. Toynbee, writing the concluding chapter of Education in the Perspective of History, which recently has been published by Harper and Brothers, is quoted ¹⁵ as counseling, "One of the devices by which these successes have been achieved has been specialization." Toynbee, who planned the volume with its author, Edward D. Meyers, continued by advising that specialization, kept in perspective, is beneficial, but it also is subject to abuses if not properly regulated.

¹⁵"Toynbee Issues a Warning," Phi Delta Kappan, Vol. 41 (June 1960), p. 402.

Toynbee seems to have placed a delimitation upon a splintering of responsibility and authority. An implication may be inferred which may make itself evident to the administrators of school systems: from the extent of the school population and its rate of growth, from the increased demands upon the superintendent's time and his capacity to cope with such demands, from the expansion of school administration with the accompanying increase in its complexity of operation, it becomes apparent that there is a point in the maturation of a school system at which specialization--to the proper degree--is not just practicable, but perhaps is actually necessary for its continued improvement.

Expansion of Duties

From the minimum responsibility and authority delegated to the business clerk, many business managers have assumed a status in school administration approaching that of the superintendent. For this reason, it is believed the importance attached to the appointment of a business manager should not be minimized. William G. and William C. Bruce, editors of The American School Board Journal, propose¹⁶ that in any small or medium sized city, school business has usually the biggest and most far-reaching effect in the community. Recognition that schools are a major financial

¹⁶William C. and William G. Bruce, loc. cit.

undertaking of the community has in the past fostered movements for dual control of the school system.

Indications that this plan of administration, which places the superintendent and the business manager on the same level of authority and each responsible to the board for his particular phase of the conduct of school affairs, is giving way in favor of the unit executive control are cited by R. O. Carlson, Assistant Professor of Education, University of California at Berkeley.¹⁷ Further, there are indications that the role which the business manager plays under this latter plan is growing in importance. According to Professor Carlson, "Often it can be seen that even with unit executive control the business manager is the real superintendent: the man the board is responsive to, the man who initiates action in the board, the man the board can communicate with and best understand." Since most boards are comprised of business and professional men, the trained business manager may be in much better position to communicate successfully with them. In Carlson's terms: "He speaks the boardman's language." Three reasons are given by him for this:

(1) The training of the school board. Over one hundred studies have shown the majority of board members to

¹⁷R. O. Carlson, "Who Speaks the Boardman's Language?" American School Board Journal, Vol. 134 (March 1957), pp. 34-6.

be business men or professional men with an orientation, logically, to a financial outlook.

(2) The paramount reasons for the existence of boards of education in American society are (a) to provide a link between public educational institutions and the public, and (b) to provide a reasonable body for the control of expenditures of public funds.

(3) Superintendents are usually members of a highly mobile group, remaining in one place only a few years, and being referred to as the superintendent of schools, who happens to be John Jones. On the other hand, business managers are usually more stable in the community, forming many personal and business acquaintances over the years, and being referred to as John Jones, who happens to be business manager of the public schools.

Growth of the school population and the accompanying expansion of the business manager's responsibilities is exemplified by Professor Emery Stoops' observation that, "When districts are quite small, the superintendent handles personnel matters. As districts grow, a business manager is employed and is often delegated responsibility for classified personnel." ¹⁸ Such an expansion of responsibilities is not alone in breadth but in depth as well. B. R. Oosting,

¹⁸Emery Stoops, "New Developments in School Personnel Administration," Phi Delta Kappan, Vol. 41 (February 1960), p. 226.

in his article, "How the Business Manager Spends His Day," reports a jury survey by Nation's Schools in which it was found that, "Almost one-fourth (22.6 per cent) of his [the business manager's] attention still is centered on accounting and finance, including budgets and school activity records."¹⁹ Information gathered in the survey was ". . . sought from those to whom the superintendent or school board had delegated the responsibility of business management."²⁰

Reproduced below is a table utilizing information gained from the above survey which shows in greater detail some of the duties found most frequently within the scope of responsibility of the respondents:²¹

PRIMARY RESPONSIBILITIES OF BUSINESS MANAGERS

Work Performed or Supervised	% Who Perform or Supervise This Work
Purchasing and Inventory Control	97.3
Equipping of Plant	94.7
Accounting and Finance	92.1
Personnel	92.1
Architectural Planning and Construction	89.4
Operation and Maintenance of Plant	81.5
Delivery and Warehousing	76.3
Board Meetings, Reports, Minutes	75.0
Cafeteria Operation	65.8
Pupil Transportation	57.9

¹⁹B. R. Oosting, "How the Business Manager Spends His Day," Nation's Schools, Vol. 60 (September 1957), p. 88.

²⁰Ibid., p. 86.

²¹Ibid., p. 88.

In addition to those responsibilities more commonly associated within the assignments of the business manager such as purchasing, inventory control, and accounting, the table reveals other items now within his range of duties such as personnel management, architectural planning and construction, and board meetings.

Increased Need for Technical Knowledge

From current literature within the field, it may be seen that the role of business management in school administration has acquired increased significance. Expanded and diversified responsibilities have placed new emphasis upon the technical skills and knowledge of the business manager. One who is in a position to be well acquainted with school business management is A. C. Hutson, Jr., a member of the editorial advisory group for Nations' Schools. Mr. Hutson, who is the business manager of the Knoxville, Tennessee, public schools, has formulated a comprehensive summary of this new role for the business manager. "School business management," offers Hutson, "involves: (1) coordinating ideas, personnel, materials, equipment, and methods in such areas as fiscal planning, budget control, purchasing, accounting, reporting, school housing, food service, and transportation; and (2) providing tools, materials, and services essential to the entire school operation in order to accomplish

the most desirable educational results in the least time at the lowest possible cost consistent with quality."²²

Indications that responsibilities within the profession have not yet reached a point of complete stability are reported by Oosting.²³ Findings of his survey to determine how the business manager spends his day and how he would spend it ideally reveal that he would prefer to reduce the time which he allots to accounting and finance by 14.6 per cent and spend 7.1 per cent less time for purchasing and inventory control. Duties to which the business manager ideally would devote more time included personnel problems, with a desired increase of 20.2 per cent from the present total; equipping of the plant, with an increase of 14.8 per cent from the present total; and architectural planning and construction, with an increase of 14.3 per cent from the present total.

In 1947, W. E. Rosenstengel, Professor of Education at the University of North Carolina and W. S. Swiers, Principal of West School, Castonia, North Carolina, reported the findings of a survey covering schools in cities ranging in size from 5,000 population to those with a population of

²²A. C. Hutson, Jr., "Team Approach: A New Philosophy of School Business Management," Nation's Schools, Vol. 64 (October 1959), p. 78.

²³Oosting, op. cit., p. 90.

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 500,000 persons. It was their conclusion that the business manager should have training in school finance, budgetary procedure, accounting and cost accounting, plant construction, plant operation and maintenance, insurance, supply management, transportation and transportation management, purchasing equipment, personnel management, payroll accounting, cafeteria management, office management, school law and contractual law. Although the results of the survey were published in 1947, the rapid growth of schools during the intervening period could lend additional credence to that need for professionalized training which is indicated by their findings.

The trend toward better educational backgrounds for school business managers is disclosed by a comparison of the results of Rosenstengel and Swiers' survey with those disclosed in an unpublished doctor's dissertation titled, The Present Status of Business Executives in the Public Schools of the United States in Cities with Twenty-five Thousand or More Inhabitants, by A. L. Heer, at Ohio State University, in 1926.²⁵ Heer found that of the business

²⁴W. E. Rosenstengel and W. S. Swiers, "Business Administration in City Schools," American School Board Journal, Vol. 114 (April 1947), p. 18. Also, "The Public School Business Manager," American School Board Journal, Vol. 115 (August 1947), pp. 32-3.

²⁵Ibid., Vol. 114 (April 1947), p. 18.

managers whom he surveyed only one in three finished college, while twenty-one years later Rosenstengel and Swiers' study showed the figure had increased to one in two for those who had received a degree. Indicative of what may be the composition of a specialized area of college study are figures taken from the latter survey showing the previous experience of those business managers responding. It was revealed that 42.1 per cent had previous business experience, 21 per cent had previous experience in education, and 28.1 per cent had previous experience in both business and education. Since 91.2 per cent of those responding had experience limited to just two fields, or a combination of the two, one might assume that those who select candidates for appointment had found applicants with such backgrounds best suited for the execution of the duties of the office of business manager.

Any attempt to be more specific in stating training requirements would appear to necessitate a more thorough examination of the duties and responsibilities of the office. Such an insight is offered by James F. Redmond, the superintendent of schools in New Orleans, Louisiana, when he outlines the four roles of the business officer:

First Role: Specific Responsibilities

1. To establish a proper accounting system,

²⁶James F. Redmond, "Business Officer Has Four Roles to Play," Nation's Schools, Vol. 53 (June 1954), pp. 82-3.

2. To establish a budgetary procedure and adequate budget controls,
3. To provide for proper property controls,
4. To insist on adequate auditing procedures,
5. To provide for bonding all school officials,
6. To safeguard school deposits,
7. To instigate and supervise a proper and adequate payroll procedure,
8. To invest school district funds prudently and with financial foresight,
9. To establish efficient office procedure for the school system,

Second Role: To Facilitate the Instructional Program,

1. School housing: heating, lighting, and ventilation,
2. Tools and materials of instruction,
3. Provision for the pay of teachers and others,
4. Repairs and remodeling of school physical plants,
5. Provision for transportation,
6. Provision for food services and supplies,
7. Cleanliness and sanitation of plant,

Third Role: Participation in Determining School Policy

1. In participation with other staff members,

2. Being spokesman and representative of school system in his business contacts in the community,
3. Member of policy determining group with parent and lay-advisory groups,
4. Working closely with state legislators on financial aspects of school administration,

Fourth Role: Close Cooperation with Superintendent on Policy and Operations.

A similar listing of suggested responsibilities for the business manager has been compiled by Morey.²⁷ Categorized into five main groups, this comprehensive list is also an indication of the scope of the educational background which may be expected of the business manager.

I. Financial functions:

1. Assistance in budget preparation,
2. Control of budget operation,
3. Collection of institutional income,
4. Preaudit of expenditures,
5. Accounting and preparation of all financial reports,
6. Internal checks and audits,
7. Inventories of property,

²⁷Morey, loc. cit.

8. Finances of student organizations,
- II. Purchasing and stores:
 1. Supervision and approval of purchasing,
 2. Physical control of supplies,
 - III. Management of Physical plant:
 1. Plant operation and maintenance,
 2. Management of new construction and expansion,
 - IV. Management of non-academic personnel:
 1. Becoming a specialized operation, often under the business manager,
 - V. General business functions:
 1. Insurance,
 2. Security and retirement systems,
 3. Relations with governmental authorities,
 4. Contracts of all kinds,
 5. Financing,
 6. Accidents and damage claims,

A review of the above lists results in the emergence of certain specialized areas of responsibility from which a desirable educational background for the business manager may be inferred. The specialized areas of responsibility suggested would include:

1. Accounting
2. Purchasing
3. Plant management

4. Management of auxiliary activities
 - a. Book store
 - b. Food services
 - c. Transportation
5. Personnel management

Recognition of Need for Professional Training

C. W. Hoff, of the University of Omaha, discusses the positive action taken by his university in establishing summer workshops for additional training for those in, or interested in, the field of school business management. Headed by John Dale Russell, the workshop in 1953 presented material in subject areas which included basic lectures in business management; budget preparation and control; philosophy of purchasing, its objectives and techniques; problems dealing with non-academic personnel; current national affairs affecting higher education; philosophy of higher education; practical accounting and reporting; research techniques; building and grounds administration; and legal aspects of business management. Areas which are planned for consideration during later workshops included casualty insurance, fidelity bonds, and institutional planning of buildings and landscaping. Interest in this specialized sort of work was exhibited by the attendance of 131 college administrators

²⁸Hoff, loc. cit.

(business managers, accountants, purchasing agents--and seven presidents) from 32 states. Similarly, in 1953, the University of Kentucky's summer workshop drew the attendance of 50 administrators of southern colleges.

Criticism of Sources

An analysis of the preceding sources of information reveals some inadequacies and some points of strength. Five of the works quoted, Arnold, Bruce, Carlson, Morey, and Redmond, while being scholarly written and basing much of their presentation on primary sources of information, may be said to lack some degree of objectivity in that their findings are not reducible to the numerical basis which is usually associated with a survey. However, when consideration was given to these writers' professional background and experience, their writings were felt to be acceptable references. Hoff, a member of the staff at the University of Omaha, reported directly from the activities of that university's workshop.

The findings of Ezell and Penn, Forner, and Rosenstengel and Swiers were derived through surveys. While the possible shortcomings of this method are recognized, nevertheless, the degree of objectivity of an investigation may be enhanced by a numerical approach. The respective percentages of returns on their survey questionnaires were 90 per cent,

93 per cent and 62 per cent. Although the comparatively low percentage of responses may reflect to some extent upon their findings, the report of Rosenstengel and Swiers was felt to be exceptional in its comprehensiveness.

In only one instance was a source used in reporting current literature in the field which was felt to be of questionable value. This article, appearing in the American School Board Journal, contained only information of a general nature, and because it was not quoted directly, and because of the integrity of the publication, such limited use was felt acceptable.

Periodicals comprise the bulk of the references used herein rather than treatises published in book form which often provide the basis for orientation in the field of related literature. Criticism may be leveled at this procedure as placing limitations upon the scope of the reported literature. On the other hand, the procedure may be regarded as justifiable when it is considered that, in a relatively new area, literature of a more current nature may more nearly reflect the nature of its tenets recently established by authorities in the field.

Summary

Several points emerge from the presentation of related literature which are worthy of consideration:

1. In size, population, and complexity, the schools appear to have experienced an increase in their rate of growth during the last several years.
2. The increased enrollments and complexity of operation in the modern school often has overreached the span of ability of the school administrator in many but the smallest school.
3. In order to compensate for the limitations upon the natural span of his ability, the school administrator often has found it to be sound practice to seek the assistance of specialists to handle the business affairs of the school, while he is released and able to devote more time to his primary function, the supervision of instruction.
4. Accompanying the growth of the schools, an increasing emphasis upon the importance of the office of the business manager and an expansion of the duties of that office is indicated.
5. The increased importance of the office of business manager appears to have led to the need for an increase in the technical knowledge and skills of that school executive.

6. It appears a need for professional training for those who enter the field of school business management is becoming generally recognized.

CHAPTER V

METHOD OF INVESTIGATION

To determine if a need exists at the University of Arizona for a collegiate major that will effectively prepare those selecting school business management as their field of endeavor for the responsibilities which they will encounter, the following method was selected.

Interviews were sought with school business managers and superintendents in Central Arizona, particularly in the Tucson and Phoenix areas. It was believed that with information gained from these school officials it might be determined primarily what were the functions of business managers in Arizona schools.

Working with this base of information, a questionnaire then was formulated which attempted to ascertain who was the business manager, what were his duties, and what was his place within the framework of school administration. The questionnaire was sent to superintendents of Arizona school systems and to superintendents of selected school systems in other western states. Distribution, while including cities showing a wide range of population, was limited to those western states which may be served by the University of

Arizona. A concentration of sampling was planned within the State of Arizona, while incidental sampling was used to select the cities in other western states to supplement information derived from superintendents of Arizona school systems.

The results were tabulated, in part, for frequency in two major groups: (1) schools with business manager, and (2) schools without business managers. Frequencies then were converted to a percentage of each total to afford some measure of comparison.

CHAPTER VI

THE QUESTIONNAIRE

A major purpose of the questionnaire was to determine the duties of the business manager--both those that are in actual practice performed by him and those which the administrators of public school systems believe he should perform.

Superintendents were asked to complete the questionnaire on the basis of the qualifications which they would desire to find in an applicant and to consider the educational and experience standards which they would seek to maintain for the office of business manager. The questionnaire's instructions stated, "While in actual practice the qualifications of available applicants may not always meet these established standards, please indicate the levels you seek--or would seek--to maintain."

Construction

The questionnaire has as its basis four primary questions:

- (1) What is the general background of the school system in relation to the establishment of the office of business manager, either in the past or in the future?

- (2) What are--or what would be--the duties and responsibilities which are encompassed in the routine of the business manager?
- (3) What are--or what would be--the levels of education and experience established as a criteria to determine the degree of acceptability of applicants for the position?
- (4) What are--or what would be--the skills, knowledges and abilities established as the criteria to ascertain the degree of acceptability of applicants for the position?

Each of the above areas was then expanded to seek out the individual school system's requirements as they would bear on the qualifications of available applicants.

Weaknesses

The inherent difficulty of establishing accurate communication between the writer and those who read his copy exists although precautions were exercised to prevent inaccuracies. To keep this possibility at a minimum, the questionnaire was subjected to a critical examination by Mr. Lon Adams, Superintendent of Schools at Marana, Arizona; Dr. T. C. Johnston of the University of Arizona, who had done research of a related nature in this area; and the late Mr. Joseph Magee, the Business Manager of Tucson School District #1 and members of his staff. Modifications were

then made according to their recommendations.

The length of the questionnaire may have acted as a deterrent to some who might have responded to a more abbreviated version. While a less extensive inquiry may have been less time consuming to the respondent, it was believed that the limited information thus gained would have been insufficient to accomplish the purpose of this thesis.

While the percentage of those responding to the questionnaire was considered sufficient to lend validity to the analysis of their answers, the response was not as high as had been anticipated or desired. This possibly was due to the time of year during which the questionnaire was released. Distribution was made during May. A follow-up letter (See Appendix C) served to bring in an additional group of returns, however, with the end of the school year approaching many of the superintendents may not have completed the questionnaire because of the demands upon their time. Offsetting this disadvantage was the wide range of enrollments represented in the replies of the superintendents.

Table 1 is presented to illustrate the geographical distribution and the number of returns for the questionnaire used in the study. Also in the tabulation will be found the enrollments of those systems sampled. Distribution in the State of Arizona represented 64 of the 90 questionnaires sent to public school superintendents, with the remaining 26

questionnaires distributed to the selected school systems in the other western states. The proportion for distribution for these two areas was approximately two to one. Returns from respondents in Arizona represented 43 responses of the total 61 returns, with the remaining 18 responses representing the selected school systems in the other western states. Again, the proportion for returns from these two areas was approximately two to one.

However, when these returns were broken down into two of the categories used for discussing the responses in this thesis, a difference in proportion was disclosed. The responses from Arizona school superintendents were divided on the basis of 16 returns for schools with a business manager and 26 returns for schools without a business manager. On the other hand, the responses from superintendents of the selected school systems in the other western states were divided on the basis of 16 returns for schools with a business manager and 2 returns for schools without a business manager.

It was felt to be worth while to examine the dissimilarity of proportion and the possibility of a bias toward the opinions of superintendents of school systems with business managers in the other western states. Because of this disparity of proportions, it occurred to the writer that in consideration of correct statistical procedures it might be indicated that the survey findings received from

superintendents of the selected school systems in the other western states be deleted entirely. Along with this critical viewpoint, the following assumptions were drawn.

- (1) The survey was limited to public school superintendents because it was believed that, as a group, they were qualified to provide the stated requirements for the office of business manager, the duties and responsibilities which would be assigned to him, the formal educational and experience backgrounds which they would desire him to possess, and the special skills and knowledge which they would seek in an applicant for that position.
- (2) Further, it was believed that as a group, public school superintendents would conform to a general pattern of responses with variations in these responses evidenced only in a comparatively minor degree. It was felt that these responses would, for the most part, be free from differences arising from geographical location.

It was decided to distribute the questionnaire most heavily in the State of Arizona because of the ease of distribution and the possible advantages that proximity would lend toward obtaining a higher percentage of responses. Another factor leading to this decision was the information gained

from the Office of the Registrar at the University of Arizona that enrollment consisted of approximately 76 per cent students graduated from Arizona high schools. It was assumed that students who had graduated from high schools in other western states would represent a rather large portion of the university's out-of-state enrollment. Accordingly, six other western states were chosen and from this area, several cities and towns were selected by incidental sampling. These 26 selections, representing a wide range of population scaled between the extremes as shown by Table 2, were made without prior knowledge of the enrollments of their school systems or whether or not the system employed a business manager.

It was felt that responses from superintendents of these selected school systems would provide information which would supplement and give additional depth to the greater bulk of information obtained from superintendents of Arizona school systems. Later, a comparison of the questionnaire responses suggested that the views of school superintendents in the other western states were endemic and not distinctly different from those held by Arizona administrators. Because of this, an arbitrary geographical division of the results to compensate for the disproportion in out-of-state returns would not seem to enhance or modify the findings of the survey to an appreciable degree.

TABLE 1

DISTRIBUTION AND RETURNS OF QUESTIONNAIRES SHOWN GEOGRAPHICALLY

		<u>Number of Returns According to Enrollments</u>										<u>Totals</u>	
		<u>1,000 and under</u>		<u>2,000 to 5,000</u>		<u>6,000 to 10,000</u>		<u>11,000 to 20,000</u>		<u>21,000 and above</u>			
<u>State</u>	<u>No. Distr</u>	<u>With BM</u>	<u>W/O BM</u>	<u>With BM</u>	<u>W/O BM</u>	<u>With BM</u>	<u>W/O BM</u>	<u>With BM</u>	<u>W/O BM</u>	<u>With BM</u>	<u>W/O BM</u>	<u>With BM</u>	<u>W/O BM</u>
California	12	1	--	1	--	1	--	--	--	5	--	8	--
Nevada	3	--	--	1	--	--	--	1	--	1	--	3	--
New Mexico	3	--	--	--	--	2	--	--	--	1	--	3	--
Oregon	3	--	--	--	--	--	1	--	--	--	--	--	1
Utah	2	--	--	--	--	--	--	--	1	--	--	--	1
Washington	3	--	--	--	--	1	--	--	--	1	--	2	--
<u>Subtotal</u>	<u>26</u>	<u>1</u>	<u>--</u>	<u>2</u>	<u>--</u>	<u>4</u>	<u>1</u>	<u>1</u>	<u>1</u>	<u>8</u>	<u>--</u>	<u>16</u>	<u>2</u>
Arizona	<u>64</u>	<u>5</u>	<u>21</u>	<u>5</u>	<u>5</u>	<u>3</u>	<u>--</u>	<u>1</u>	<u>--</u>	<u>2</u>	<u>--</u>	<u>16</u>	<u>27^a</u>
<u>Total</u>	90	6	21	7	5	7	1	2	1	10	--	32	29

^aEnrollment for one Arizona school system without a business manager not reported.

TABLE 2
CITY POPULATIONS IN SELECTED WESTERN STATES

City	City Population ^a	School Enrollment	Bus Mgr Yes	Bus Mgr No	Did Not Respond
Seattle, Wash.	560,000	97,000	x		
San Diego, Cal.	494,201	112,996	x		
Oakland, Cal.	405,000	65,000	x		
Salt Lake City, Utah	207,000				x
Spokane, Wash.	185,000				x
Sacramento, Cal.	158,000				x
Albuquerque, N. M.	152,000	49,852	x		
Pasadena, Cal.	118,000	32,783	x		
San Bernardino, Cal.	83,145	32,000	x		
Riverside, Cal.	75,673	24,000	x		
Ogden, Utah	67,000	17,100		x	
San Mateo, Cal.	65,999				x
Reno, Nevada	48,000	15,305	x		
Las Vegas, Nevada	47,500	24,100	x		
Eugene, Oregon	46,000				x
Santa Fe, N. M.	28,500	6,637	x		
Medford, Ore.	22,000	7,600		x	
La Mesa, Cal.	21,000	9,600	x		
Clovis, N. M.	19,500	6,000	x		
Klamath Falls, Ore.	19,000				x
Olympia, Wash.	17,300	6,000	x		
Redding, Cal.	12,216				x
Barstow, Cal.	10,017	5,054	x		
Elko, Nevada	6,700	3,050	x		
Susanville, Cal.	5,338				x
Needles, Cal.	4,776	1,600	x		

^a1957 estimated population.

CHAPTER VII

DISTRIBUTION OF THE QUESTIONNAIRE

Distribution of the questionnaire was made to superintendents of school systems in the states of Arizona, California, Nevada, New Mexico, Oregon, Utah and Washington. The heaviest concentration of this distribution fell within the State of Arizona and sought a wide range of enrollments. Distribution in the balance of the states was made on the basis of incidental sampling. It was hoped by seeking the information from schools showing such a range of enrollments that the needs of both those schools with business managers as well as those without business managers would be reflected. As well, it was believed that conditions on which the respondents based their replies would be indicative of conditions throughout the field of public education in the Western United States. The concentration of the distribution of questionnaires throughout Arizona was based on the belief that the majority of students who might seek admittance to the University of Arizona for study in the field of public school business management would have been graduated from Arizona high schools and, after completing such a course of study at the university, they primarily would seek employment within

the state. It was for this reason, then, that questionnaires were sent to sixty-four superintendents of the seventy-one school systems which included one or more secondary schools listed in the Arizona Educational Directory.²⁹

Accompanying the questionnaire was a covering letter (see Appendix A) which introduced the questionnaire (see Appendix B) and gave a brief resume of its intent. In addition, a self-addressed stamped envelope was enclosed for the convenience of those answering the questionnaire. Following the distribution of the questionnaire by six weeks was a follow-up letter (see Appendix C) designed to remind and stimulate those who had not already responded.

Table 3, as shown on page 44, shows the number of questionnaires and the percentage of the total distributed among the various states included in this survey. The table, as well, shows the number of questionnaires returned and the per cent of the total that the number represents.³⁰

²⁹Arizona Educational Directory, School Year 1957-1958, State Department of Public Instruction (1957), Phoenix, Arizona.

³⁰The figures comprising the tables in Chapter VIII have been carried out to .01 per cent, then rounded off to .1 per cent. In order to obtain columnar totals of an even 100.0 per cent, it was, in a few instances, necessary to adjust figures within the columns by .1 per cent.

CHAPTER VIII

RESULTS OF THE SURVEY

Distribution and Returns of the Questionnaire

Ninety copies of the questionnaire were distributed, with 61 copies returned for a response of 67.8 per cent. It will be noted that of the 61 returns, 32, or 52.5 per cent, were from school systems with business managers, while the remaining 29 returns, or 47.5 per cent, were from school systems without business managers. In four, or 13.8 per cent, of the 29 systems without business managers, the establishment of that office was being contemplated, while in one, or 3.5 per cent, the administrator indicated that such a step in his system was in doubt. The balance of 24, or 82.7 per cent, of the superintendents replied that the establishment of such an office was not being considered at present.

In total, 90 copies of the questionnaire were distributed throughout the western part of the United States. Of this total, 64, or 71.1 per cent, were distributed throughout Arizona. Of the 61 returns, 43, or 70.5 per cent, were from Arizona. The next greatest number of questionnaires were distributed throughout California. Returns from that state were also second in volume. The percentage of returns

from California school systems closely parallels that from Arizona systems.

TABLE 3
DISTRIBUTION OF QUESTIONNAIRES

<u>State</u>	<u>Number Sent</u>	<u>Per cent Of Total</u>	<u>Number Returned</u>	<u>Per cent Of Total</u>
Arizona	64	71.1%	43	70.5%
California	12	13.4	8	13.2
Nevada	3	3.3	3	4.9
New Mexico	3	3.3	3	4.9
Oregon	3	3.3	1	1.6
Utah	2	2.3	1	1.6
Washington	<u>3</u>	<u>3.3</u>	<u>2</u>	<u>3.3</u>
Totals	90	100.0%	61	100.0%

Time in Operation

While Table 4 shows a wide range in the length of time during which the offices of business managers have been in operation, it should be noted that almost 10 per cent of these offices have been created within the one year preceding the survey, and 28.1 per cent in the five years preceding the survey. No less than 71.8 per cent of the offices reported to be in operation have been created within the last 16 years; this, in spite of the fact that one office was created more than 40 years ago.

Further examination would indicate that the establishment of business managers offices in the school systems surveyed has been on an accelerated basis during the last twenty years.

TABLE 4

LENGTH OF TIME BUSINESS MANAGERS' OFFICES IN OPERATION

<u>Years in Operation</u>	<u>Number of Bus Mgrs Offices</u>	<u>Per cent of Total</u>
Less than 1 year	3	9.4
1-5	9	28.1
6-10	7	21.8
11-15	4	12.5
16-20	2	6.3
21-25	-	--
26-30	2	6.3
31-35	-	--
36-40	3	9.4
40 +	1	3.1
Unknown	<u>1</u>	<u>3.1</u>
Total	32	100.0

Current Enrollments

A comparison of current enrollments (Table 5) for those school systems in which a business managers office has been established varies considerably. From a low enrollment of 500 students at Agua Fria Union High School, Avondale,

Arizona, the enrollment reached a high of 112,996 students at San Diego Unified School District, San Diego, California. School systems in the 600 to 10,000 range of enrollments reached 59.4 per cent of the greatest concentration of business managers of the total reported. However, this should not be construed to mean necessarily that systems reporting higher enrollments show a lesser concentration to their total. Rather, it should be considered that schools in the higher ranges of enrollment are simply less frequently found than those in the middle range of pupil population.

Considering those schools without a business manager, Table 5 covers a range of enrollments from 60 students at Maricopa, Arizona, to 17,100 students at Ogden, Utah. Within the range of enrollments 250 to 5,000 students, the concentration of school systems without business managers reached 86.1 per cent of their total.

It is interesting to note that of the 32 school systems reporting business managers, 10 (31.2 per cent) show enrollments exceeding the maximum enrollment of 17,100 students for those systems without business managers. As it may be expected, the concentration of those schools without business managers is centered around those schools with the lower enrollments, while those systems which have instituted the office of business manager appear to be fairly well distributed in the range of enrollments starting with

approximately 1,000 students and continuing with a growing concentration among the schools with higher enrollments.

TABLE 5
COMPARISON OF CURRENT ENROLLMENTS

<u>Enrollment</u>	<u>Schools With Bus Mgrs</u>		<u>Schools W/O Bus Mgrs</u>	
	<u>Number</u>	<u>Per cent</u>	<u>Number</u>	<u>Per cent</u>
Less than 250	-	--	1	3.5
250-500	1	3.1	3	10.3
600-1,000	5	15.6	17	58.6
2,000-5,000	7	21.9	5	17.2
6,000-10,000	7	21.9	1	3.5
11,000-15,000	2	6.3	-	--
16,000-20,000	-	--	1	3.5
21,000-30,000	3	9.4	-	--
31,000-40,000	3	9.4	-	--
41,000-50,000	1	3.1	-	--
51,000-75,000	1	3.1	-	--
76,000-100,000	1	3.1	-	--
101,000-125,000	1	3.1	-	--
Not reported	-	--	1	3.4
Totals	32	100.0	29	100.0

Influence of Enrollments

It becomes apparent in Table 6 that schools of larger enrollments have had their business managers' offices in operation for greater lengths of time than have the schools of

lower enrollments. For example, three of the total number of schools having business managers fell within the 21,000 to 30,000 range of enrollments at the time of the establishment of the business managers' offices. This was 9.4 per cent of the total of schools with business managers. The average number of years that the office of business manager had been established for this group of schools was 19.7 years. The two schools in the 31,000 to 50,000 range of enrollments each reported the establishment of their business managers office for as long as 40 years.

On the other hand, the schools of lower enrollments showed a markedly lower number of years during which the office of business manager had been in operation. For example, the 20 schools shown in the 250 to 5,000 range of enrollments, which constituted 62.5 per cent of the total number of schools with business managers, showed an average length of time in operation of less than eight years.

TABLE 6

ENROLLMENTS AT TIME OFFICES OF BUSINESS MANAGERS CREATED

<u>Enrollments</u>	<u>Number of Schools</u>	<u>Per cent of Total</u>	<u>Av No Yrs BM Office Establ'd</u>
250-1,000	9	28.1	7.7
2,000-5,000	11	34.4	7.8
6,000-10,000	1	3.1	10.0
11,000-15,000	3	9.4	11.3

(Continued)

TABLE 6 (CONTINUED)

<u>Enrollments</u>	<u>Number of Schools</u>	<u>Per cent of Total</u>	<u>Av No Yrs BM Office Establ'd</u>
16,000-20,000	1	3.1	3.0
21,000-30,000	3	9.4	19.7
31,000-40,000	1	3.1	40.0
41,000-50,000	1	3.1	40.0

Reasons for Establishment

Again, as might be expected, increased enrollments were cited in Table 7 as one of the principal reasons for the establishment of the office of business manager. Of the total number of respondents, 29, or 90.6 per cent, indicated the reason for establishment of the office of business manager was increased enrollments. Following this, the next most often cited reason was expanded curricula. This was cited by 26, or 84.4 per cent, of the total respondents.

A need for a business management specialist was the next most often cited reason, with 26, or 81.3 per cent, of the respondents giving this as a reason. Ranking high also among the number of times items were cited was the reason, additional time needed for supervision of instruction. Of the total number of respondents, 24, or 75.0 per cent, cited this reason. Administrators also felt important such reasons as a need to facilitate communication between schools and local businesses, pressures brought about by an accelerated building

program, a need to promote favorable public relations, and increased purchasing activities. Again, many of these items may be related directly to increased enrollments.

TABLE 7

REASONS AS STATED BY SUPERINTENDENTS LEADING TO
ESTABLISHMENT OF BUSINESS MANAGERS' OFFICES

<u>Stated Reasons</u>	<u>Times Cited</u>	<u>Per cent of Respondents</u>
Increased enrollments	29	90.6%
Expanded curricula	27	84.4
Need for business management specialist	26	81.3
Additional time for supervision of instruction	24	75.0
Facilitate communication between schools and local businesses	14	43.8
Accelerated building program	7	21.9
Promote favorable public relations	5	15.6
Increased purchasing activities	4	12.5
Additional federal activities	3	9.4
More complex budget	2	6.3
Recruitment of new teachers	2	6.3
Expanded accounting activities	1	3.1
Augmented guidance services	1	3.1
Increased personnel administration	1	3.1
Bond issues	1	3.1

Levels of Responsibility

In this section the questionnaire again sought the views of both the superintendents of school systems with business managers and the opinions of superintendents of school systems without business managers. An interesting disparity can be noted here. Of the 32 schools which have business managers, 25, or 78.1 per cent, indicated that it was felt the business manager should be placed on the upper level of administration holding the title assistant superintendent or associate superintendent. Only five, or 15.6 per cent, of this group felt that he should appear in the middle level of administration as a department or division head, while only two, or 6.3 per cent, of this group indicated an opinion that the business manager should be placed on a clerical level where supervision of no other individual would be necessary.

These views are in contrast with the views held by the superintendents of schools without business managers. Only three, or 10.3 per cent, of their total felt that the business manager should be placed on the upper level of administration as an assistant or associate superintendent. In further contrast, 20, or 69.0 per cent of this group, believed that the business manager should be placed in the middle level of administration as a department or division head, while only one, or 3.4 per cent, of the group stated

that the business manager should be placed on a clerical level and supervise no other individual. Five, or 17.3 per cent of this group, stated no opinion as to the administrative level on which the business manager should be placed.

The contrasting views held by superintendents of schools with business managers and the superintendents of schools without business managers was felt to be especially interesting. It will be noted that superintendents of school systems with business managers in the majority felt that the business manager should be placed on the upper level of administration and given the title of assistant or associate superintendent. Only a small portion of superintendents who supervise a business manager felt that he should be placed on a lower level of administration. The percentages of superintendents holding these opinions are in almost inverse proportion to the percentages of the opinions held by superintendents of schools without business managers.

TABLE 8

LEVELS OF ADMINISTRATION FOR BUSINESS MANAGERS
AS SUGGESTED BY SUPERINTENDENTS

<u>Level of Responsibility</u>	<u>Schools W/Bus Mgr</u>		<u>Schools W/O Bus Mgr</u>	
	<u>No.</u>	<u>%</u>	<u>No.</u>	<u>%</u>
Upper level of administration (asst or assoc superintendent)	25	78.1	3	10.3
Middle level of administration (dept or div head)	5	15.6	20	69.0

TABLE 8 (CONTINUED)

<u>Level of Responsibility</u>	<u>Schools W/Bus Mgr</u> <u>No.</u>	<u>%</u>	<u>Schools W/O Bus Mgr</u> <u>No.</u>	<u>%</u>
Clerical (supervises no other individual)	2	6.3	1	3.4
No opinion stated	-	--	5	17.3
Totals	32	100.0	29	100.0

Reasons for Non-Appointment

In response to the inquiry for the reasons the office of business manager had not been established, the item most frequently cited was enrollment. Twenty-two, or 75.9 per cent, of the administrators felt that enrollment had not reached a level to require that degree of specialization within their system. Twelve, or 41.4 per cent, of the administrators felt that the curriculum had not expanded sufficiently to require the exclusion of business affairs from the superintendent's office. The lack of available funds was also cited nine times by the administrators, 31.0 per cent of the total, making it the third most frequently cited reason for the office of business manager not being established.

TABLE 9

REASONS AS STATED BY SUPERINTENDENTS WHY
OFFICE OF BUSINESS MANAGER NOT ESTABLISHED

<u>Stated Reasons</u>	<u>Times Cited</u>	<u>Per cent of Respondents</u>
Enrollment has not reached level to require this degree of specialization	22	75.9%
Curriculum has not expanded sufficiently to require exclusion of business affairs from superintendent's routine	12	41.4
Funds not available	9	31.0
Lack of trained personnel	1	3.4
Community does not favor	1	3.4

Duties of Business Managers

In this section superintendents were asked to indicate "the duties and responsibilities which are--or would be--encompassed in the routine of the business manager." They were further asked to add any items which had been omitted in the questionnaire. Here again the replies were broken down into two major categories: (1) replies from superintendents in schools with business managers, (2) replies from superintendents in schools without business managers. It was felt in this way that both assigned and advocated duties of business managers would be presented. As it is indicated in Table 10, superintendents of school systems in which the office of business manager is in operation feel that a

rather high degree of training would be desirable for a business manager. In addition, those same school superintendents have indicated in Table 8 that a rather high degree of responsibility would be placed upon the business manager. For example, 32, or 84.4 per cent, of the superintendents who were assisted by business managers replied that they felt the business manager should direct the business and financial program of the school system. Other responsibilities which a high percentage of the school superintendents felt should be placed upon the school business manager were: supervision of the departments of purchasing and comptroller, direction of the school insurance program, supervision of the telephone and communication services, supervision of the control of surplus property, preparation of the budget, supervision of budget control, preparation of financial reports, direction of the preparation of the payroll, and finally two responsibilities, which are indicative of the key position in which the superintendents would place the business manager: (1) assist the superintendent in formulating policies and directives which effect the business and financial program of the school system (2) upon request of the school board provide counsel relating to school business affairs. In all of the foregoing, superintendents who are assisted by business managers agreed by better than 80 per cent that these duties should be within the business manager's

scope of responsibilities. In only one instance--supervision of the bookstore--did the proportion of superintendents who felt that the business manager should be given this responsibility fall below 50 per cent. Coincidentally, 40.6 per cent of "No Response" for this item was unusually high.

In contrast with the rather high degree of responsibility placed upon the business managers by the superintendents of schools in which that office is in operation, the superintendents of schools without business managers showed a possible reluctance to designate the responsibilities which would be delegated to the business manager. Percentages in the "No Response" column ranged from a low of 27.6 per cent to a high of 37.9 per cent for this section. While this may have reduced the validity for this section, nevertheless, percentages of those replying in this section manifested within this group of administrators a rather strong degree of concurrence for most items.

Differences of opinions were evidenced, however, with such items as "supervision of buildings and grounds" (yes 31.1 per cent, no 37.9 per cent); "supervision of transportation services" (yes 34.5 per cent, no 34.5 per cent); "working in conjunction with the school system's attorney in legal matters" (yes 34.5 per cent, no 31.0 per cent); and "evaluates plans for proposed buildings, additions and

improvements to existing school sites" (yes 31.0 per cent, no 34.5 per cent).

While superintendents without business managers were, in the main, in agreement that responsibility should be delegated to the business manager for the items appearing in this section, nevertheless, there were some items the responsibility for which the administrators apparently did not wish to delegate. The following items fell in this category: "makes decisions on the use of funds from the capital outlay section of the budget" (yes 20.7 per cent, no 44.8 per cent); and "supervise the use of transportation equipment" (yes 24.1 per cent, no 41.4 per cent). Responses for the balance of the items indicated a willingness to delegate responsibility, and in some cases, this willingness extended to the point where no dissenting opinions were received. For example: "prepare financial reports" (yes 69.0 per cent, no 0 per cent); "directs the preparation of the payroll" (yes 69.0 per cent, no 0 per cent); and "assist the superintendent in formulating policies and directives which affect the business and financial program of the school system" (yes 65.5 per cent, no 0 per cent).

TABLE 10

ASSIGNED AND ADVOCATED DUTIES OF BUSINESS MANAGERS
REPORTED BY SUPERINTENDENTS

<u>Duties</u>	<u>32 Schools With Business Managers</u>			<u>29 Schools Without Business Managers</u>		
	<u>%</u>	<u>%</u>	<u>% No</u>	<u>%</u>	<u>%</u>	<u>% No</u>
	<u>Yes</u>	<u>No</u>	<u>Resp</u>	<u>Yes</u>	<u>No</u>	<u>Resp</u>
Directs the business and financial program of the school system	84.4	12.5	3.1	41.4	24.1	34.5
Supervises the departments of:						
purchasing	87.5	9.4	3.1	58.6	10.4	31.0
comptroller	87.5	6.3	6.2	62.1	6.9	31.0
buildings and grounds	59.4	37.5	3.1	31.1	37.9	31.0
school lunch	71.9	25.0	3.1	48.3	20.7	31.0
transportation services	56.3	37.5	6.2	34.5	34.5	31.0
bookstore	43.8	15.6	40.6	51.7	17.3	31.0
cashier	59.4	3.1	37.5	62.2	3.4	34.4
Directs the school insurance program	81.3	12.5	6.2	55.2	13.8	31.0
Works in conjunction with the school system's attorney in legal matters	71.9	21.9	6.2	34.5	31.0	34.5
Supervises the leasing or renting of school property	75.0	18.8	6.2	37.9	24.2	37.9
Supervises telephone and communication services	84.4	9.4	6.2	51.7	17.3	31.0

TABLE 10 (CONTINUED)

<u>Duties</u>	<u>32 Schools With Business Managers</u>			<u>29 Schools Without Business Managers</u>		
	<u>% yes</u>	<u>% no</u>	<u>% No Resp</u>	<u>% yes</u>	<u>% no</u>	<u>% No Resp</u>
Supervises the control of surplus property	81.3	15.6	3.1	55.2	13.8	31.0
Prepares the budget	84.4	12.5	3.1	41.4	31.0	27.6
Supervises budget control	93.8	3.1	3.1	58.6	10.4	31.0
Prepares financial reports	87.5	9.4	3.1	69.0	----	31.0
Makes decisions on the use of funds from the capital outlay section of the budget	53.1	37.5	9.4	20.7	44.8	34.5
Directs the preparation of the payroll	93.8	3.1	3.1	69.0	----	31.0
Directs the personnel program for employees within his area of responsibility	71.9	25.0	3.1	44.8	24.2	31.0
Supervises the use of transportation equipment	53.1	37.5	9.4	24.1	41.4	34.5
Supervises the collection and disbursement of student activity funds	75.0	18.8	6.2	58.6	10.4	31.0
Evaluates plans for proposed buildings, additions and improvements to existing school sites	53.1	43.8	3.1	31.0	34.5	34.5

TABLE 10 (CONTINUED)

<u>Duties</u>	<u>32 Schools With Business Managers</u>			<u>29 Schools Without Business Managers</u>		
	<u>%</u>	<u>%</u>	<u>% No</u>	<u>%</u>	<u>%</u>	<u>% No</u>
	<u>Yes</u>	<u>No</u>	<u>Resp</u>	<u>Yes</u>	<u>No</u>	<u>Resp</u>
Assists the super- intendent in formu- lating policies and directives which affect the business and financial program of the school system	93.8	3.1	3.1	65.5	----	34.5
Formulates policies and directives, with only final approval from the superintend- ent, which affect the business and financial program of the school system	78.1	15.6	6.3	37.9	24.2	27.9
Assists the super- intendent in formu- lating policies and directives which, upon occasion, may affect the entire school system	78.1	15.6	6.3	48.3	17.2	34.5
Upon request of the school board, provides counsel relating to school business affairs	90.6	6.3	3.1	51.7	13.8	34.5
Attends board meet- ings and participates in discussions re- lated to business and financial affairs of the school system	81.3	15.6	3.1	44.8	17.3	37.9

Education and Experience

Respondents were advised that this section of the questionnaire attempted to determine the levels of education and experience which have been established, or would be established, as criteria to determine the degree of acceptability of applicants for the position of business manager. Further, it was pointed out that while in actual practice the qualifications of available applicants might not always meet these standards, the respondent should indicate the level of education and experience he would seek to maintain. Of the 32 schools with business managers, 59.4 per cent of the superintendents reported that a high school education would be required of applicants seeking the position of business manager. In addition, 31.3 per cent of the superintendents in this group indicated that they would require some type of post high school education such as course work at a college, junior college, business college, night school, or other special training courses related to the field of school business management. While the percentages were lower for those who would require a college degree, nevertheless, some emphasis was placed upon such requirements as college degrees in business education (25.0 per cent of the total), accounting (15.6 per cent of the total), and a specially designed major for school business management (12.5 per cent of the total). In considering work on the

college level, the superintendents indicated preference for requirements in the following areas: education supported by a bachelor's degree in business (15.6 per cent of the total), business supported by a bachelor's degree in education (9.4 per cent of the total), or a specially designed major for school business management (9.4 per cent of the total).

College degrees were felt to be desirable, but not required, in a specially designed major for school business management (53.1 per cent of the total), accounting (46.9 per cent of the total), and business education (34.4 per cent of the total). The superintendents of school systems with a business manager also indicated that they would not require, but felt to be desirable: (1) graduate work in a specially designed major for school business management (43.8 per cent of the total), (2) education supported by a bachelor's degree in business (37.5 per cent of the total), (3) business supported by a bachelor's degree in education (34.4 per cent of the total).

Superintendents of school systems without business managers emphasized the following educational requirements. Of their total, 44.8 per cent indicated that some post high school education would be required. Others of this group emphasized degree requirements in business education (27.6 per cent of the total), accounting (24.2 per cent of the total), and a specially designed major for school business management (20.7 per cent of the total). In considering

graduate work on the college level, preference was given to a specially designed major for school business management (27.6 per cent of the total).

This same group of superintendents, in whose school system the office of business manager has not been instituted, indicated by a figure of 34.5 per cent that a college degree in a specially designed major for school business management would not be required but would be desirable. In considering graduate work on the college level on the basis of desirability, rather than as a requirement, this group favored graduate work in education supported by a bachelors degree in business (24.1 per cent of the total), graduate work in a specially designed major for school business management (24.1 per cent of the total), and graduate work in business supported by a bachelors degree in education (20.7 per cent of the total).

An interesting comparison presents itself when experience requirements are considered as stated by the superintendents of school systems without business managers. Of the former group, 18.8 per cent felt a limited amount of experience within the department or similar organization should be required, while members of the latter group indicated by 44.8 per cent that this qualification should be a requirement. In considering other experience, both groups of respondents tended to parallel their preferences, giving

particular emphasis toward seeking persons who had had experience in management, purchasing and accounting in the field of business. In considering experience which would be desirable but not required, superintendents of school systems with business managers placed particular emphasis upon experience within the field of public school business management. While not placing as much emphasis upon this type of experience, school administrators from those systems without business managers evidenced in their reply that such experience was felt to be valuable.

In both groups of school administrators, weight was given to the desirability of experience in the field of education. However, there was a divergence of opinion between the two groups in considering the desirability of experience in the field of business. Administrators from those school systems with business managers placed much greater weight upon the desirability of experience in accounting, purchasing and management. This is not to say, however, that those superintendents in school systems without business managers ignored the value of this type of experience.

TABLE 11

EDUCATIONAL BACKGROUND AND EXPERIENCE OF BUSINESS MANAGERS REPORTED BY SUPERINTENDENTS
(Requirements and Recommendations)

	32 Schools With Business Managers				29 Schools Without Business Managers			
	Required	Not Required	Not Required, But Desirable	No Response	Required	Not Required	Not Required But desirable	No Response
Part A: <u>Education</u>								
High School education	59.4	3.1	3.1	34.4	24.1	----	----	75.9
Post high school education (course work at a college, junior college, business college, night school, or other special training courses related to the field of school business management)	31.3	6.3	9.4	53.0	44.8	----	----	55.2
College degree in:								
accounting	15.6	15.6	46.9	21.9	24.2	3.4	13.8	58.6
business education	25.0	12.5	34.4	28.1	27.6	3.4	17.3	51.7
government service	3.1	46.9	9.4	40.6	----	27.6	6.9	65.5
specially designed major for school business management	12.5	9.4	53.1	25.0	20.7	3.4	34.5	41.4

(Continued)

TABLE 11 (CONTINUED)

	32 Schools With Business Managers				29 Schools Without Business Managers			
	Required	Not Required	Not Required But Desirable	No Response	Required	Not Required	Not Required But Desirable	No Response
<u>Part A: Education (Continued)</u>								
Graduate work on the college level:								
in education supported by a bachelor's degree in business	15.6	25.0	37.5	21.9	10.3	10.3	24.1	55.2
in business supported by a bachelor's degree in education	9.4	18.9	34.4	37.5	10.3	6.9	20.7	62.1
in education supported by a bachelor's degree in any field	3.1	40.6	6.3	50.0	----	24.1	6.9	69.0
in business supported by a bachelor's degree in any field	6.3	34.4	3.1	56.2	----	20.7	10.3	69.0
in specially designed major for school business management	9.4	15.6	43.8	31.2	27.6	6.9	24.1	41.4

Part B: Experience

In the field of public school business
management:

TABLE 11 (CONTINUED)

	32 Schools With Business Managers				29 Schools Without Business Managers			
	Required	Not Required	Not Required But Desirable	No Response	Required	Not Required	Not Required But Desirable	No Response
<u>Part B: Experience (Continued)</u>								
limited amount of experience within the department or in a similar organization	18.8	18.8	21.9	40.5	44.8	----	3.4	51.7
several years of experience on lower levels of responsibility within the department or in a similar organization	21.9	12.5	43.7	21.9	17.3	3.4	27.6	51.7
broad experience on the next lower level of responsibility in a similar organization	6.3	12.5	40.6	40.6	6.9	10.3	27.6	55.2
broad experience on the next lower level of responsibility within the department	3.1	15.6	37.5	43.8	6.9	6.9	20.7	65.5
several years experience on a comparable level of responsibility and in a comparable school system	9.4	12.5	46.9	31.2	10.3	6.9	27.6	55.2

TABLE 11 (CONTINUED)

	32 Schools With Business Managers				29 Schools Without Business Managers			
	Required	Not Required	Not Required But Desirable	No Response	Required	Not Required	Not Required But Desirable	No Response
<u>Part B: Experience (Continued)</u>								
In the field of education:								
teaching, business education	12.5	37.5	18.8	31.2	10.3	6.9	20.7	62.1
teaching, other areas	15.6	25.0	12.5	46.9	3.4	10.4	13.8	72.4
administration	21.9	25.0	18.8	34.3	10.3	3.4	34.5	51.7
clerical	12.5	37.5	12.5	37.5	10.4	3.4	20.7	65.5
In the field of business:								
accounting	31.3	3.1	56.3	9.3	31.0	6.9	24.1	38.0
purchasing	25.0	3.1	56.3	15.6	31.0	3.4	27.6	38.0
management	28.1	3.1	53.2	15.6	31.0	3.4	31.0	34.6

Skills

In this section the respondent was asked to indicate the skills and knowledge which had been established--or would be established--as criteria to ascertain the degree of acceptability of applicants for the position of business manager in their school systems. In the 32 school systems with business managers, superintendents placed a high emphasis upon the ability to read and interpret financial statements (96.9 per cent of the total), balance sheets (93.8 per cent of the total), trial balances (87.5 per cent of the total), purchasing procedures (87.5 per cent of the total), contracts (81.3 per cent of the total), accounting (78.1 per cent of the total), school finance (78.1 per cent of the total), school law (75.0 per cent of the total), and personnel management (65.6 per cent of the total). On one item only in the "skills" section did the administrators indicate any divergence of opinion. Within the group who have business managers, 40.6 per cent felt that reading and interpreting blue prints was a required skill, while 37.5 per cent indicated that this skill, while desirable, was not required.

Replies from the superintendents of the 29 schools without business managers showed a distinct parallel between the experience requirements favored by this group and those indicated by the preceding group. Although the percentages of those favoring such requirements did not reach the

proportion shown by the previous group, the similarity in ranking was striking, even in the response to the skill item "blueprints," which showed 31.0 per cent considering it as a requirement while 31.0 per cent felt it to be desirable but not required. The opinions of the respondents were also fairly equally divided regarding a knowledge of school administration. Of the group, 34.5 per cent believed this should be a requirement, while 31.1 per cent believed this knowledge would be desirable but would not consider it to be a requirement.

TABLE 12

REQUIRED AND RECOMMENDED SKILLS FOR BUSINESS MANAGERS REPORTED BY SUPERINTENDENTS

<u>Skills</u>	<u>32 Schools With Business Managers</u>				<u>29 Schools Without Business Managers</u>			
	<u>Required</u>	<u>Not Required</u>	<u>Not Required But Desirable</u>	<u>No Response</u>	<u>Required</u>	<u>Not Required</u>	<u>Not Required But Desirable</u>	<u>No Response</u>
1. Read and interpret								
a. financial statements	96.9	-----	-----	3.1	72.4	-----	-----	27.6
b. balance sheets	93.8	3.1	-----	3.1	72.4	-----	-----	27.6
c. trial balances	87.5	3.1	6.3	3.1	72.4	-----	-----	27.6
d. blueprints	40.6	15.6	37.5	6.3	31.0	6.9	31.0	31.1
e. contracts	81.3	6.3	6.3	6.1	41.4	-----	27.6	31.0
2. Know								
a. accounting	78.1	3.1	12.5	6.3	65.5	-----	6.9	27.6
b. purchasing procedures	87.5	3.1	3.1	6.3	72.4	-----	-----	27.6
c. personnel management	65.6	15.6	18.8	-----	48.3	3.4	17.3	31.0
d. school administration	46.9	15.6	28.1	9.4	34.5	3.4	31.1	31.0
e. school finance	78.1	6.3	6.3	9.3	69.0	-----	3.4	27.6
f. school law	75.0	6.3	15.6	3.1	65.5	-----	3.4	31.1
3. Use adding machines, calculators and other office machines	59.4	12.5	18.8	9.3	44.8	-----	24.2	31.0

CHAPTER IX

ANALYSIS OF RESPONSES

General Information

In the analyzation of Table 4 a rather definite trend emerges; during the last twenty years the number of school systems creating the office of business manager has indicated a sharp acceleration. In the group of school systems being considered, 6.3 per cent of the superintendents reported the office in operation for 16 to 20 years. Those school systems having the office in operation from 11 to 15 years comprised 12.5 per cent of the total, the group reported in operation from 6 to 10 years consisted of 28.1 per cent of the total. Those systems in which the office of business manager was reported to be in operation less than one year includes almost 10 per cent (9.4 per cent) of the total.

A study of current enrollments as shown in Table 5 appears to indicate a point at which enrollments become a factor in determination of the need for a business manager. Of the schools without business managers, only two, or 7.0 per cent of the total, showed enrollments exceeding 6,000 pupils, while 21, or 72.4 per cent, of the superintendents from schools in this group reported enrollments of 1,000 or less pupils. Inversely, the superintendents of school

systems with business managers reported enrollments of 1,000 or less students in only six, or 18.7 per cent, of the systems, while the balance of the systems, 26 in number, or 81.3 per cent, showed enrollments of 2,000 or more. Superintendents from 20, or 62.5 per cent, of the 32 school systems in which the office of business manager had been created reported the creation of that office by the time enrollment had reached 5,000. It would appear then, that enrollments reaching a certain level give rise to certain conditions which lead to the appointment of business managers.

A point worth examination, which is brought out by Table 6, is the trend toward establishing the offices of business managers in schools of smaller enrollments. As it was noted previously, the smaller schools reported on the average less than eight years during which their office of business manager had been in operation. Yet these same schools in this study comprise almost two-thirds of the total number of schools having a business manager. This would seem to indicate, then, a trend of small schools instituting that office within a more recent span of years, while schools which had larger student enrollments when the office was created have had a business manager functioning for longer periods of time. "A rule of thumb that may be applicable," suggests B. R. Oosting, who is the business manager for the Hinsdale, Illinois, Public Schools, "is that a school

district needs a business manager when the enrollment of the district reaches a thousand pupils."³¹

Superintendents' replies to Table 7 tend to further substantiate the foregoing quotation. Superintendents cited increased enrollments and expanded curricula as the two foremost reasons leading to the establishment of the office of business manager.

Citing the need for a business management specialist, 81.3 per cent of the superintendents (see Table 7), who utilize the post of business manager in their systems, emphasize this is a factor which must be considered. Further, 78.1 per cent of this group of superintendents (see Table 8) would place the business manager on the upper level of administration with the title of assistant or associate superintendent. The implications may be drawn that the superintendents have experienced a need for someone with a high degree of training to whom a high degree of responsibility could be delegated.

Although it may appear that the superintendents of smaller systems are prone to delegate a minimum amount of authority to the business manager, many undoubtedly feel that the enrollment of their systems is such as to require only little more than clerical assistance. However, at some

³¹B. R. Oosting, "When Does a School System Need a Business Manager?" Nation's Schools, Vol. 59 (May 1957), p. 100.

point, enrollment reaches a figure when the superintendent may feel inadequate to cope with the diversity of problems with which he is presented and may recognize the benefits believed to be derived from having a business management specialist who can assume a sufficient degree of authority to relieve him of these tasks and allow him the time needed to deal with educational problems.

Analysis of Duties

While considering the duties which would be performed by the business manager, superintendents stressed functions suggesting a background in business and finance as well as in public school education (see Table 10). To be more fully prepared to perform these assigned duties, it would seem an educational background would be needed in accounting, purchasing, school construction, insurance, school law, communication services, budget and budget control, payroll, personnel, transportation, and school administration.

Educational Background

While the majority of respondents from school systems with business managers favored, as a minimum, a high school education as a requirement for that position, many felt the education requirements should include, not only some post high school education, but, as well, a bachelor's degree and, in some instances, graduate work on the college level.

Percentages for those favoring post high school education or university work as desirable but not required were even higher, indicating a trend favoring advanced education for the business manager.

Respondents from school systems not employing a business manager answered rather strongly in favor of some post high school education as an educational requirement for the business manager. As it was with the previous group of superintendents, this group showed interest in establishing a bachelor's degree in accounting or in business education as a requirement. Graduate work on the college level found favor to approximately the same degree with the superintendents from schools without business managers as with the superintendents reporting in the other group.

Concordant opinions were offered by superintendents of both groups in giving positive consideration to the desirability of a specially designed major for school business management on the college level. This opinion was reflected further when these groups favorably considered the desirability of a specially designed major for school business management on the graduate level of college work. In both cases, the respondents showed almost as great, or in some cases greater, preference for this type of scholastic training than for any other submitted for their consideration or suggested by their group.

Background of Experience

In weighing the experience requirements, superintendents of schools with business managers placed greatest emphasis on accounting in the field of business, followed closely by management and purchasing in that order. Lesser degrees of importance were placed on the requirements for experience in educational administration and several years of experience on lower levels of responsibility within the department or in a similar organization.

The preferences of this group, shown in ranking experience not required but desirable, indicates a marked similarity to the requirements which were selected. Here again, experience in accounting, purchasing, or management in the field of business was given preference over experience within the department or in a similar organization. The latter, in turn, was preferred over experience in the field of education.

In considering experience requirements, superintendents of systems without business managers preferred a limited amount of experience within the department or in a similar organization as the leading requirement. This was followed by experience in accounting, purchasing, or management within the field of business, with greater weight being placed on this type of experience than by superintendents of systems with business managers. Indicating preferences for

experience not required, but desirable, these superintendents gave priority to experience in educational administration followed by experience in management, purchasing, or accounting in the field of business, and experience within the department or in a similar organization.

Skills

In considering requirements regarding specialized skills, superintendents of school systems with business managers favored heavily the ability to read and interpret financial statements, balance sheets, and trial balances. Items also given considerable emphasis were a knowledge of purchasing procedures, the ability to read and interpret contracts, and a knowledge of accounting, school finance, and school law. It was felt to be desirable, but not required, by these administrators that the business manager be able to read and interpret blue prints.

Superintendents of school systems without business managers considering required skills and knowledges, indicated preferences for the ability to read and interpret financial statements, balance sheets and trial balances; also given emphasis was a knowledge of purchasing procedures, school finance and school law. Here, too, superintendents felt the ability to read and interpret blue prints, though not required, would be desirable. A knowledge of school

administration and the ability to read and interpret contracts, though not required, were also felt to be desirable.

CHAPTER X

CONCLUSIONS

What may be a growing trend is indicated by the information reported in Table 4. Not only is there an increase in the number of school systems which have established the office of business manager, but a noticeable acceleration is apparent in this trend during the last twenty years. This acceleration is even more evident during the last five years. It would appear, then, that school administrators in increasing numbers are accepting a theorem for increased efficiency held for many years by industrial management: specialization. It would seem that administrators are becoming more aware of the growing complexity of their executive duties. It is Oosting's contention ". . . there is usually a point in a school system's population growth when business affairs become so complicated that, from an economical point of view, it pays to employ a specialist."³²

Faced with expanding enrollments and increasingly complex curricula, these administrators apparently find that not only are they freed to devote more time to educational problems, but also that the control of the business affairs

³²Ibid., p. 100.

of the system may be more efficiently handled with the appointment of a business manager. These conclusions were further confirmed by Ezell and Penn in their survey of 50 superintendents of Texas school systems. Forty-five of the administrators stated without qualification that the employment of the business manager had resulted in better business practices in their schools. To this question only two respondents gave negative answers. A second question: "Has the office of business manager justified its cost in your school?" brought forty-eight positive replies and a single negative return.

Without exception, superintendents of schools with business managers replying to this present survey answered in the affirmative when asked, "Is it felt that the establishment of the office of business manager has been (or would be) a factor which has increased (or would increase) the administrative efficiency of the school system?" This unity of opinion seems to emphasize the acceptance of the business manager as an asset to school administration.

The consequence of the business manager within the school administrative system is indicated by the superintendents' stated preferences which place him in the middle level of administration, or even more often, in the upper

³³Ezell and Penn, loc. cit.

level of administration. The delegation of such authority and responsibility lends justification to the belief that the position of business manager is not one of meniality. In addition, administrators indicated in their selection of assigned and advocated duties of the business manager, that such duties could be associated with a high degree of responsibility and authority.

The position taken by superintendents attests to a belief that the execution of the responsibilities of the business manager will achieve a higher measure of efficiency if he has completed specialized course work of an advanced nature beyond the high school level. Further, many indicated a belief that such specialized course work should be completed as graduate work on the college level. Responses were indicative of a favorable view toward a specially designed major for school business management appearing either on the college undergraduate level or on a graduate level.

In viewing the employment background acquired prior to the appointment of a business manager, superintendents generally favored training derived experientially from the field of business.

Interpreting responses from the school administrators, it would appear that business managers' skills and knowledges should be a composite of accounting with a good background

in purchasing coupled with a knowledge of law, particularly school law and contracts. In addition, knowledge of school finance and administration accompanied by personnel management was felt to be indicated of value.

From the foregoing we may conclude:

- (1) There appears to be an accelerated trend toward the establishment of business managers offices.
- (2) There is a point reached by enrollments at which administrators find that the operation of the school system may benefit from the establishment of the office of business manager.
- (3) By the time the enrollment of the school system has passed 1,000 it would seem the need for a business manager has become apparent.
- (4) Increased demands upon the superintendents' time appears to be a prime factor leading to the establishment of business managers' offices.
- (5) The business manager may be vested with a high degree of authority and responsibility.
- (6) The assigned and advocated duties of business managers are encountered as a group, it appears, in no other area of business or in no other area of education.
- (7) The educational background of the business manager may consist of course work, in many

instances, as advanced as graduate work on the college level and, in many of these cases, may include college undergraduate work in a specially designed major for school business management or graduate work on the college level in such a specialized area.

- (8) The business manager's background could be of increased value with experience in both the field of business and the field of public school business management; also desirable is experience in the field of education.
- (9) The business manager, it would appear, should possess certain skills and knowledges which may be peculiar to either the field of business or the field of education.

In view of the foregoing statements, it may be concluded that the increased importance of the office of business manager has come to require an increase in his technical skills, as well as a more professionalized background of education and experience. Data received from public school superintendents would suggest a professional program of study for preparation in public school business management. Such a program might be administered jointly by the College of Business and the College of Education. Replies to the survey indicate a breadth and depth of courses which possibly

would require undergraduate work in one college and graduate work in the other. The value of such professional training for business managers apparently is becoming generally recognized, and since the University of Arizona has not yet initiated a major course of study designed to prepare candidates for the field of school business management, a need for such a major does exist.

It is believed that the establishment of this major field of study will meet the needs of individuals residing within the general geographical area believed to be served by the University of Arizona who wish to enter the field of school business management.

The schools, having available to them the services of professionally trained business managers, may benefit through an efficient division of labor which could provide for the superintendent recourse from the pressures of non-instructional duties.

Finally, the public, through the improved operation of schools that could result from the services of professionally trained specialists, may find itself the ultimate beneficiary.

We may conclude that according to the stated requirements of public school superintendents and the duties of those practicing in the field of school-business management

a need does exist for a collegiate major at the University of Arizona that may effectively prepare those selecting this profession for the responsibilities which they may encounter.

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APPENDIX A

COVERING LETTER FOR THE QUESTIONNAIRE

University of Arizona

TUCSON

COLLEGE OF BUSINESS
AND PUBLIC ADMINISTRATION

May 15, 1959

Superintendent of Schools
Elko Public Schools
Elko, Nevada

Dear Sir:

Enclosed is a questionnaire going to a representative group of public school superintendents throughout the western states. This survey seeks to determine if a need exists for a collegiate major at the University of Arizona for those intending to enter public school business management. Although I am making the survey as a thesis project, this College is interested in the results and has approved the survey.

Public school administrators in this area with whom the problem has been discussed are in general agreement that there appears to be a need for specialized training for school business managers. Therefore, a more comprehensive survey is being undertaken.

It is hoped that your comments may aid in solving one of the urgent administrative problems facing many superintendents--that of finding a qualified business manager. Thank you for your assistance toward this end. If you would be interested in the final results of the survey, jot a note at the bottom of the questionnaire.

Yours very truly,

Robert J. Marshall

APPENDIX B

THE QUESTIONNAIRE

I. GENERAL INFORMATION

1. Name of school system: _____
2. City and state where administrative offices are located: _____, _____
3. Does the school system have a business manager? Yes _____ No _____
4. If the office of business manager has not been created, is the establishment of such a position contemplated? Yes _____ No _____
5. If the office of business manager has been established, approximately what length of time has it been in operation? _____
6. What is the current student enrollment of the school system? _____
7. What was the approximate student enrollment at the time the office of business manager was established? _____
8. How many employees are assigned to the staff of the business manager? _____
9. Is it felt that the establishment of the office of business manager has been (or would be) a factor which has increased (or would increase) the administrative efficiency of the school system? Yes _____ No _____

Answer either question 10 or question 11, whichever is applicable to your school system.

10. The office of business manager was created:
 - a. to relieve the greater demands on the superintendent's time resulting from
 - (1) expanded enrollments. Yes _____ No _____
 - (2) expanded curricula. Yes _____ No _____
 - (3) increases in other administrative duties. Yes _____ No _____
(please list)

I. GENERAL INFORMATION (continued)

b. to provide for the superintendent additional time for the supervision of instruction. Yes _____ No _____

c. because the growing complexity of school business affairs indicated the need for a specialist. Yes _____ No _____

d. to facilitate closer communication between the school and business elements within the community. Yes _____ No _____

e. other reasons (please list)

11. The office of business manager has not been created:

a. because enrollment has not reached the level to require this degree of specialization in the school system's administration. Yes _____ No _____

b. because the curricula have not expanded sufficiently to require the exclusion of the management of business affairs from the superintendent's routine. Yes _____ No _____

c. because funds for the operation of the office are not available. Yes _____ No _____

d. other reasons (please list)

12. On what level of the administration do you feel the business manager should be placed? (please check one)

a. Upper level of administration (assistant or associate superintendent) _____

b. Middle level of administration (department or division head) _____

c. Clerical level (supervises no other individual) _____

II. ANALYSIS OF DUTIES (continued)

	Yes	No	Title of Employee Performing Function
10. Prepare financial reports?.....			
11. Make decisions on the use of funds from the capital outlay section of the budget?.....			
12. Direct the preparation of the payroll?.....			
13. Direct the personnel program for employees within his area of responsibility?.....			
14. Supervise the use of transportation equipment?.....			
15. Supervise the collection and disbursement of student activity funds?.....			
16. Evaluate plans for proposed buildings, additions and improvements to existing school sites?.....			
17. Assist the superintendent in formulating policies and directives which affect the business and financial program of the school system?.....			
18. Formulate policies and directives, with only final approval from the superintendent, which affect the business and financial program of the school system?.....			
19. Assist the superintendent in formulating policies and directives which, upon occasion, may affect the entire school system?.....			
20. Upon request of the school board, provide counsel relating to school business affairs?			

II. ANALYSIS OF DUTIES (continued)

Yes	No	Title of Employee Performing Function
21. Does the business manager attend board meetings and participate in discussions related to business and financial affairs of the school system?.....		
22. Have other duties not listed above? (please list).....		

III. LEVELS OF EDUCATION AND EXPERIENCE

(This section attempts to determine the levels of education and experience which have been established--or would be established--as criteria to determine the degree of acceptability of applicants for the position of business manager in your school system. While in actual practice the qualifications of available applicants may not always meet these standards, please indicate the levels you seek--or would seek--to maintain.)

Required	Not Required	Not Required, But Desirable
A. <u>Education</u>		
1. High school education		
2. Post high school education (Course work at a college, junior college, business college, night school, or other special training courses related to the field of school business management).....		
3. College degree in:		
a. accounting.....		
b. business education.....		

III. LEVELS OF EDUCATION AND EXPERIENCE (continued)

	Required	Not Required	Not Required, But Desirable
c. government service.....			
d. specially designed major for school business management....			
e. other majors desired (please list)			

4. Graduate work on the college level:			
a. in education supported by a bachelor's degree in business.....			
b. in business supported by a bachelor's degree in education.....			
c. in education supported by a bachelor's degree in any field.....			
d. in business supported by a bachelor's degree in any field.....			
e. in specially designed major for school business management.....			
f. other graduate work desired (please list)			

III. LEVELS OF EDUCATION AND EXPERIENCE (continued)

B. Experience

- 1. In the field of public school business management
 - a. limited amount of experience within the department or in a similar organization.....
 - b. several years of experience on lower levels of responsibility within the department or in a similar organization..
 - c. broad experience on the next lower level of responsibility in a similar organization.....
 - d. broad experience on the next lower level of responsibility within the department.....
 - e. several years of experience on a comparable level of responsibility and in a comparable school system.....
- 2. In the field of education
 - a. teaching, business education.....
 - b. teaching, other areas (please list)

 - c. administration.....

Required	Not Required	Not Required, But Desirable

III. LEVELS OF EDUCATION AND EXPERIENCE (continued)

	Required	Not Required	Not Required, But Desirable
d. clerical.....			
e. other experience in the field of education which is desired (please list)			

3. In the field of business			
a. accounting.....			
b. purchasing.....			
c. management.....			
d. other experience in the field of business which is desired (please list)			

4. Other experience in any field which is desired (please list)			

APPENDIX C

FOLLOW-UP LETTER FOR THE QUESTIONNAIRE

University of Arizona

TUCSON

COLLEGE OF BUSINESS
AND PUBLIC ADMINISTRATION

July 3, 1959

Mr. Jack Belzner, Superintendent
Coolidge Public Schools
Coolidge, Arizona

Dear Sir:

In May a questionnaire was sent to you which sought information to be used in determining if a need exists at the University of Arizona for a collegiate major for those entering public school business management. Since the questionnaire was sent only to a representative group of school superintendents, your views and the facts which you can supply about your school system will be of value in bringing the survey to a sound conclusion.

May we expect your completed copy soon? Your assistance will be appreciated.

Yours truly,

Robert J. Marshall