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A vision for school business management: A reflective essay

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A vision for school business management: A reflective essay

Abstract

I started work as Board Secretary for the Mar-Mac Community School District on August 8, 1978. This happened to be the same school district I graduated from eight years earlier. The size of the district, enrollment about 300, did not warrant a professional business manager. That was a fortunate thing for me, as my undergraduate major was in psychology, not in a business related field. Throughout my career, I have always considered this lack of a business background to be a personal weakness. On the other hand, the psychology background has proven to be a personal strength due to the people-oriented nature of public schools.

A VISION FOR SCHOOL BUSINESS MANAGEMENT
A REFLECTIVE ESSAY

A Research Paper
Presented to
The Department of Educational Administration
and Counseling
University of Northern Iowa

In Partial Fulfillment
of the Requirements for the Degree
Master of Arts in Education

by
Jon E. Miller
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This Research Paper by: Jon E. Miller

Entitled: A VISION FOR SCHOOL BUSINESS MANAGEMENT:

A REFLECTIVE ESSAY

has been approved as meeting the research paper requirements
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I started work as Board Secretary for the Mar-Mac Community School District on August 8, 1978. This happened to be the same school district I graduated from eight years earlier. The size of the district, enrollment about 300, did not warrant a professional business manager. That was a fortunate thing for me, as my undergraduate major was in psychology, not in a business related field. Throughout my career, I have always considered this lack of a business background to be a personal weakness. On the other hand, the psychology background has proven to be a personal strength due to the people-oriented nature of public schools.

The real impetus for starting an advanced degree program stemmed from a bad work environment. I worked with a superintendent who constantly kept our district in disharmony with his dictatorial leadership style and attitude. I would assume that he took a course in School and Community Relations somewhere along the line, but apparently he either did not pay much attention or chose to ignore the subject completely. "In systems where desirable administration-employee relations are found, the superintendent is usually a capable executive who possesses a dynamic and pleasing personality, a deep respect for human values, and an ability to work democratically with people" (Kindred, p. 98). Unfortunately, this particular superintendent showed little

respect for human values and was far from democratic. During his tenure I considered quitting my job, borrowing the necessary money to go to school full-time and taking my chances in the job market after graduation. Fortunately, he left the district before any of that happened. Through all of the negative experiences encountered in this work environment came some positive outcomes. First and foremost, it reinforced the importance of good interpersonal skills and the belief in treating people in a fair and reasonable manner. This superintendent was very skilled in school finance and was also good in other important areas such as curriculum and operation of the physical plant, but no one really cared about those abilities because of his poor people skills. The superintendent of the 21st century

will possess a strong self-respect and respect for others and will have a high boiling point and high tolerance for ambiguity and uncertainty. He/she will work in a much flatter organization and be comfortable with equal empowerment to others in the school setting. He/she will have strong skills in persuasion and will have earned equal status with other community leaders. He/she will model

integrity and honesty, find joy in the schools, be health conscious, and find humor in himself and in others. (Lewis, p. 231)

These same characteristics will be necessary for the successful school business manager. It might be trite, but the old saying that "nobody cares how much you know until they know how much you care" will, in my opinion, always hold water in the public school setting. Education is a service oriented profession and there is no room for the selfish or self-centered.

An Indiana study conducted in 1993 identified nineteen critical success factors of a school business manager's job that had to be executed correctly in order for that person to be perceived as successful.

These critical success factors were ranked in the following order from high to low: human interaction skills, overall general business management skills; oral communication skills; written communication skills, resourcefulness; integrating the district budget with its obligations; ability to sell administrative recommendations; educating board members; persuading others to understand the bottom line; compliance with regulatory agencies; ability to adapt to various leadership styles and situations;

labor relations; employee benefits administration; knowledge of insurance issues; facilities, school construction and architectural issues; accounting and/or inventory of supplies, materials and assets; public relations; computer literacy, and transportation. (Snyder, pp. 18 & 19)

Human interaction skills were further defined as the ability to get along with, work with, understand, appreciate, respect, negotiate, empathize, disagree with and enjoy others. The importance of good interpersonal skills is, in my opinion, absolutely critical in the field of public education. Our reliance on the community for support and funding dictates a need to be responsive in a positive way to that same community. Not to do so would be professional suicide, as exemplified by the aforementioned superintendent.

When this superintendent left, the district first utilized the services of an interim superintendent and then entered into a shared superintendent arrangement with a neighboring district. Both of these experiences proved to be professional growth opportunities as more responsibility fell on my shoulders. The sharing arrangement had one ultimate purpose - to reorganize the two districts into one. This potential uncertainty for my personal employment led me to look at other districts and I ended up in Carlisle. This

district was four times the size of Mar-Mac. I gained immense confidence and a great deal of personal satisfaction from being able to go into a district where I knew absolutely no one and to be successful strictly on my own merit and hard work. While at Carlisle the opportunity for higher education was much greater with Drake University only twenty minutes away. At Drake I took a course in Collective Bargaining from Dr. Barry Steim. In reviewing notes from that class I find it interesting that Dr. Steim states, "win/win is nonsense, neither side wins, the best agreement is one where both parties are unhappy" (B. Steim, personal communication, November, 1988). This is in marked contrast to an article written only five years later. "In the past few years many labor relations experts and others have advocated a "win/win" approach as an alternative to the traditional adversarial style of bargaining. This new style of bargaining relies on trust and consensus building instead of mistrust and confrontation" (Harris, p. 6). I can certainly say that the bargaining process has matured dramatically over the eighteen years that I have been in school business management. I can recall an incident at Mar-Mac where our school board negotiator placed his index finger on his own chin and challenged the teacher's union representative person to "let him have it" during a rather heated exchange. I think this

incident symbolized some of management's anger with the collective bargaining process in the earlier years. Management's loss of total control over the employee was difficult to accept at first. Even though I sit on the management side of the table, we need to realize that it was in part due to our own treatment of employees that caused them to organize in the first place.

From Carlisle I moved to Independence in October, 1988. This was when I started the program at UNI. The first class I took was School Finance. This class covered a wide range of issues from the economics of education, taxation, equality vs. equity, roles of the local, state and federal governments to the origin and development of state financing formulas (Burrup, Brimley & Garfield, 1988). This was truly one of the more interesting courses I took through the entire program as it really cut to the heart of what school business management is all about. Taxation is certainly a sensitive issue in rural Iowa and this course helped with understanding its basic principles. Reviewing basic school funding formulas and better understanding Iowa's finance formula were very helpful in the operation of my own district. In fact, the first budget that I ever completed from beginning to end was done during the time that I was taking this course and the timing could not have been better.

School and Community Relations is a very important component of this degree program. Jackie Mitchell, professor at Iowa State University, states "school public relations is effective, two-way communication that provides quality information, is inclusive rather than exclusive and is motivated by a serving interest" (J. Mitchell, personal communication, May 19, 1993). The Indiana study cited earlier indicates the high level of importance of communication. Keeping people informed and aware is extremely important in the public schools. After all, they are "public", and should be treated as such. Schools are open systems, supported by the general public through tax dollars and this same public has the right to know how their tax dollars are being spent and what return they are getting for their investment. Accountability is more than just an educational buzzword. Support of public schools seems to be waning as less people have children in school which lends itself for them to be less connected to the school. Positive communication is a necessary tool to help maintain support for the schools. The textbook discussions of communication with our internal and external publics was very beneficial. To my way of thinking, communication is second only to human relations in importance and, in reality, is a large part of the human relations skill.

Another lesson from this class was the importance of becoming involved in the community. If we are willing to draw a salary from tax dollars generated by the community, I do not think it is unreasonable that we should give something back to that same community in the way of involvement in civic organizations, church activities, volunteer work or whatever one might choose to become involved. The whole notion of being service oriented is reinforced through this type of involvement.

The whole arena of open enrollment also dictates the need for good public relations with our community. We no longer have a captive audience trapped by school boundary lines. The freedom of choice through open enrollment empowers parents to have an impact on the operation of their school district. Unfortunately, the freedom of choice through open enrollment has really turned out to be the freedom of convenience as evidenced by the table on page 9.

School law was intriguing, but at the same time, somewhat overwhelming. This could be, and certainly is, an entire career track for some individuals. This historical review of some of the landmark cases such as Brown v. Board of Education of Topeka (Alexander, p. 409) and Plessy v. Ferguson (Alexander, p. 406) was interesting enough, but the real benefit of the class, in my opinion, was the briefs that

Table 1

Parents' Reasons for Using Open Enrollment in the
1991-92 School Year:

Reason	Percent
1. Proximity	19.6
2. Educational benefits	21.7
3. Activities	1.4
4. Ethnic/student composition	0.7
5. Family convenience	29.0
6. Peer group	8.6
7. Scholastic atmosphere/values	7.7
8. Conflict - staff/students	2.9
9. Other	8.5

Source: Iowa Department of Education

Note. Proximity and family convenience account for nearly half of the requests for open enrollment.

we were assigned to do. These were real cases that we could easily find ourselves involved in and reviewing them could possibly keep us out of trouble. Everyone has an opinion about the law, but in our profession we would be well advised to consult with professional legal counsel before charging

too far ahead into the unknown. It seems that very complicated cases can have relatively simple beginnings. Jamie Ferrare, Human Resources Director at the West Des Moines Community School District, states "we do not stumble over mountains, we stumble over molehills" (J. Ferrare, personal communication, May 18, 1994). School law will continue to emerge as a more important part of school business management as our "blameless" society continues to expect the school to do more and more. The school should not be expected to take on the role of the family, but unfortunately I think that is happening more and more.

The Principles of School Business Management was perhaps the most practical course taken throughout the program, along with School Finance. This course hit a lot of the day-to-day operations of the district. The text outlined seven major functions of school business management: "planning, organizing, staffing, directing, controlling, decision-making and evaluating" (Wood, pp. 16 & 17). Management theories, organizational structure, budgeting systems, purchasing, construction, risk management, cash management, personnel management and support services were all issues covered in detail during this course. For the practitioner, this is the class that brought a lot of things together. It gave the

opportunity to compare what I was actually doing to recommended procedures and was a good reminder of all the hats that we wear.

The personnel course was another one that hit home closely to the daily operation of the district. The personnel function is divided into 11 areas: "planning, bargaining, recruitment, selection, induction, appraisal, development, compensation, justice, community and information" (Castetter, p. 5). I see an unsettling trend emerging in the selection process of the personnel function. It seems we cannot ask pertinent, specific questions for fear of infringing upon someone's personal rights or freedoms. Also, when checking references it seems more and more difficult to get an honest answer, especially if there have been any previous problems, which is exactly why the reference check is being made in the first place. The previous employer is afraid to say anything negative about an employee for fear of legal reprisal by the employee if they do not get the new job. It is very disturbing to think that a sub-par employee can move from district to district simply because open and honest answers are not given. The scenario that would be more difficult would be someone who would deliberately lie or leave out information just to get rid of a bad employee. Another aspect of the personnel function

that could stand to be overhauled is the appraisal, or evaluation system. "Weaknesses in traditional appraisal systems, after nearly a half-century of experience, appear to be legion" (Castetter, p. 255). "The idea of evaluating all competent teachers every year according to a common set of performance standards that, at best, represent minimum or basic expectations is little short of an institutionalized insult" (Duke, p. 703). It seems to me administrators spend an inordinate amount of time performing a mundane function that accomplishes little other than meeting a policy or contractual requirement. This "accountability" component of the typical evaluation system really gets in the way of any real improvement of the teaching process.

I've often asked myself the inevitable question of why I would pursue a Master's Degree in a field that I practiced on a day-to-day basis for the past eighteen years. Self-improvement has been the consistent answer throughout the years. Professional advancement was certainly another reason. I also truly enjoyed taking the classes and meeting new people, so I guess I enjoyed a social benefit as well. The opportunity for employment in other states was a consideration at one time, though not anymore. Surprisingly, money was a very small motivating force. The program itself seemed at times almost a test in perseverance. Seven,

actually eight, years is a long time from start to finish and many things changed, both personally and professionally. The recent death of my father has had a profound impact. I no longer take the workaholic approach and make a point to spend more time at home with my children.

Many good things happened over these past years. A strong network of peers was established. Let's face it, not many of us are going to reinvent the wheel. If something is working, there is no reason it can not be modified to fit another district, certainly not everything, but many things. I think the coursework reinforced many of the things I was already doing. The importance of good communication and interpersonal skills cannot be overemphasized. School business management is clearly people oriented. I think the establishment of trust is a key element of the successful school business manager. In order to establish this trust, we might have to take the first step. Cynics might view this trust idea as a character weakness, setting ourselves up for a big fall, but I think trust should be viewed as a definite strength.

Other personal characteristics that I think are very important are honesty, integrity, understanding and a true concern for other people. Professional characteristics would include accountability, responsibility, ethical behavior and,

again, honesty. We need to realize that we do have an impact on the education of students and need to take that very seriously. Our whole existence is to support the education of the children in our school districts. I think we need to be certain that people feel they are a part of the decision-making process in issues that affect them. They need to feel ownership in the process, not to mention the fact that they have first hand knowledge of what will work and what will not.

The school business manager needs to have a small ego that is fed by the satisfaction of a job well done. We are certainly in a position of influence, but must be careful to use that influence properly. We need to help facilitate change and be proactive leaders in our schools. Our jobs are becoming more political in nature. This is not necessarily a good thing, because sometimes politics will get in the way of sound educational practices, but is something we have to deal with nonetheless.

Of all the things I learned or reviewed, the one that stands out most to me is the exposure I've had to the classroom teacher throughout this program. I have gained a perspective that I never had before. I still have not exactly "walked in their shoes", but feel I now have a better understanding of some of their concerns. I think this will

will carry forward and help me in the years to come. The demands on the public schools continue to grow, but are not paralleled with a willingness to financially support these same demands. The resourcefulness of the school business manager will be tested as time goes on, particularly if the current conservative movement in our country continues.

There is one thing that all school business managers would be well advised to remember: We deal with two things that are very dear to people, their children and their money, and we best never lose sight of that fact.

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