

BRIDGE LEADERSHIP IN SCHOOL RESOURCE MANAGEMENT:
SCHOOL BUSINESS ADMINISTRATOR PERSPECTIVES

A Dissertation by

James K. (J.K.) Campbell

Bachelor of Arts/Education, Wichita State University, 1986

Masters of Educational Administration & Supervision, Wichita State University, 1999

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The following faculty members have examined the full copy of this dissertation for form and content, and recommend that it be accepted in partial fulfillment of the requirement for the degree of Doctor of Education with a major in Educational Leadership.

Jean Patterson, Committee Chair

Jo Bennett, Committee Member

Randy Ellsworth, Committee Member

Nancy McCarthy Snyder, Committee Member

Patrick Terry, Committee Member

Accepted for the College of Education

Sharon Iorio, Dean

Accepted for the Graduate School

J. David McDonald, Dean

ABSTRACT

Understanding technical skills of financial resource management is clearly one of the most important aspects of the school business administrator's job. Less clear is their understanding of the collaborative role played in addressing issues of equity and low achievement of marginalized students, and how decisions made about use of resources advances social justice and equity or perpetuates oppression within the school setting. This study examines the perceptions of school business administrators about how they can work most effectively with school leadership teams to leverage district funds to best support student achievement and equitable educational practices, while minimizing the detrimental effects of nationwide budget cuts. Emergent research is necessary to connect the position of the school business administrator to resource management practices supporting equal opportunity for all learners, advance issues of social injustice and inequities within school systems, and establish the school business administrator's knowledge of resource allocation in the context of social justice and equity.

The theoretical framework for this qualitative study merges social critical theory, leadership for social justice theory, and the construct of bridge leadership to elevate the leadership role a school business administrator can play in contributing to the overall effectiveness of education and instruction. The researcher interviewed 14 school business administrators across the U.S. and used the constant comparative method to analyze data. Implications from the research include the need to better connect leadership to required school business official technical skills and improve SBO training and professional development.

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CHAPTER 1

INTRODUCTION

There has been an abundance of literature written on educational leadership and the qualities most likely to bring about success as an educational leader (Copland, 2003; Day, Sammons, Hopkins, Leithwood, & Kington, 2008; Leithwood & Jantzi, 2008; Penlington, Kington, & Day, 2008; Printy, 2008; Thompson, 2008). Less literature is available connecting the practices of the successful school business administrator to a district's goal of meeting the educational needs of an increasingly challenging and diverse clientele. According to authors McClain and King (2009), school business officials (SBOs) viewed technical skills as more essential to their positions than leadership skills. When surveyed, SBOs determined ten technical skills most essential. Seven of the highest-rated technical skills fell within the area of financial resource management (McClain Jr & King, 2009). Results of the survey might indicate, when compared to other district administrative roles, SBOs appeared to be the least concerned with issues of instruction and equity in spite of the changing environment of schools and a substantial focus on educating all students to high standards (Borman, Hewes, Overman, & Brown, 2003; Darling-Hammond, 1997; Haycock, 2001; Levy & Murnane, 2001; Resnick, 2006). Without diminishing important technical skills, the school business official may need to develop additional skill sets required of all school administrators that enhance leadership traits focused on collaboration and student achievement. Recognizing the important role a person in this position can play in contributing to the overall effectiveness of education and instruction, this study has two related purposes. The first is to examine the perceptions of school business administrators about their role in relation to student achievement and equitable educational practices. The

second examines perceptions about best practices in resource allocation when faced with significant budget reductions.

Research Problem

Districts across the country face many challenges in meeting assessment targets outlined by federal No Child Left Behind (NCLB) and state legislation (Kansas State Department of Education, 2008; U.S. Department of Education, 2002). This has become even more apparent with recent and profound cuts to district budgets due to declining State revenues, and an inability of many states to appropriately fund public education and provide necessary resources to public school districts. Always on the forefront, educational finance systems that meet state constitutional requirements and provide all school districts with the resources needed to meet high performance standards is clearly information the SBO is required to know; a topic full of litigation. Much of the litigation and the literature on school finance centers on the debate of equity and adequacy. Problematic issues to financing public education include an inability to provide high-quality education that is equitable to all students despite the consequences of individual differences, place of residence, or degree of parental affluence, while providing adequate funding with maximum fairness to taxpayers (Burrup, Brimley, & Garfield, 1996; Grubb, 2009; Karp, Lowe, Miner, & Peterson, 1997; Maiden & Stearns, 2007; Yinger, 2004).

No Child Left Behind (NCLB) legislation elevated the equity in education debate even further with the requirement of connecting resources to achievement. Public school districts more than ever are responsible for allocating resources to close the achievement gap between disadvantaged and minority students and their peers, and the legislated act “calls for equity” (McKenzie & Scheurich, 2004, p. 602). However, the pressure to produce better results and meet the goal of all students achieving with fewer and fewer resources has become more acute.

States across the nation have experienced drastic cuts in dollars available to fund public education as a result of declining revenues and difficult economic conditions. Unfortunately, this economic recession occurred at a time when costs for public schools have significantly increased to meet the mandates of NCLB. Likewise, reductions in school budgets have resulted in the elimination of teachers, programs, and best practice strategies which directly support the learning and high achievement of all students (Kansas Association of School Boards, 2010). It has become especially important in times of economic downturn to harness funding and resources to provide all students with appropriate and equitable learning opportunities. Given the ambiguity inherent in defining and discussing equity in school finance (Glenn, 2009; Vesely, Crampton, Obiakor, & Sapp, 2008), it has also become necessary for the school business leader to serve the larger administrative team in interpreting financial resource management and in applying skills of socially just resource management within an ever changing context.

As established, school business administrators are responsible for allocating and managing resources. This is clearly one of the most important aspects of the SBO's job. Less clear is their understanding of the collaborative role played in addressing issues of equity and low achievement of marginalized students, and how decisions made about use of resources advances social justice and equity or perpetuates oppression in the school setting. Separating oppression in the education setting from the economy and connected economic factors is not easily accomplished (Kincheloe & McLaren, 2002).

Purpose of the Study and Research Questions

The purpose of this study was to examine the perceptions of a sample of U.S. school business administrators about how they work most effectively with school leadership teams to leverage district funds that best support student achievement and equitable educational practices,

while minimizing the detrimental effects of nationwide budget cuts. The following questions guided this study:

What do school business administrators consider best practices when faced with significant budget reductions?

How do school business administrators describe their role in relation to student achievement and equitable educational practices?

Most research focuses on the role of superintendents, teachers, and students in the public school arena, leaving a definite void or gap in shaping critical aspects specific to the work of the SBO. Also conspicuously absent in both literature and public practice “is an alternative or a reconceptualized role or function of school business administration, along with a description of the implications for an implementing process and for practice” (Ray, Hack, & Candoli, 2001, p. viii). If this reconceptualized role is to link with school improvement, equitable opportunity, and all students achieving, then emergent research is needed to establish the SBOs knowledge and perspectives related to best practices in resource management in the context of social justice and equity, even more compelling during periods requiring budget reductions.

CHAPTER 2

THEORETICAL FRAMEWORK AND LITERATURE REVIEW

The following chapter describes the theoretical framework used to authenticate this study; the lens or perspective from which this study was analyzed. It is followed by a review of empirical literature and other literature related to the research problem.

The theoretical framework substantiating this study is multi-layered. The framework relies on frequently conflated aspects of the critical social perspective (Crotty, 2007; Frederickson, 1990; Merriam, 1998), leadership for social justice theory (Bogotch, 2002; Marshall & Oliva, 2006; Theoharis, 2007), and the assumptions underlying what is described in a growing body of literature as bridge leadership (Brooks, Jean-Marie, Normore, & Hodgins, 2007; Merchant & Shoho, 2006). Bridge leadership elevates leaders focused on issues of social justice and those who play a significant role in improving access and opportunity for all children in the public school setting.

The critical social perspective provides an overarching, macro context. This perspective has been largely ignored in public administration (Frederickson, 1990), a workforce focused on efficiencies and closely aligned in context to the work of school business administrators. Public administration, like school business administration, is more often concerned with micro implementation over macro societal context, resulting in administrators avoiding the questioning of socially just practices such as oppression or inequitable structure. When considering equality and power structures at the macro-level within public education, the researcher closely considers institutional procedures, decisions leading to school management and curricular processes, as well as policy development and implementation (Lynch & Baker, 2005). There is reason to

believe the critical social perspective applied to public administration, as well as school business administration, can promote the study of those conditions that shape and constrain social change, and elevate awareness among this workforce about oppressive elements within the larger society and within public and educational policy (Box, 2005).

The second layer of the framework, leadership for social justice theory, evolves from the broader perspective of critical social theory and equally applies to school business administration. Social justice discourse in education, steeped in the critical social perspective, is not easily separated from this larger theory. It critiques educational experiences that promote inequity in achievement and economic outcomes and calls for sweeping and fundamental changes to address educational and social inequity (Furman & Gruenewald, 2004). Often, the educational system reproduces existing power structures and maintains the status quo. Social justice in the field of educational leadership, less defined among educational researchers, addresses myriad issues centered on equity and equality of opportunity, informing subjects such as human rights, poverty, racism, sexism, and homophobia as well as others (Grogan, 2010; North, 2008). Regardless of definition, the debate and discussion centered on any or all of these issues can allow the school business leader to better understand concepts of social justice and the role school business leadership decisions play in providing appropriate resources to disrupt inequitable practices.

Moving outside abstract conceptualization and paying close attention to concrete, real world practices, the third layer authenticates those who give meaning and purpose to the greater and overarching theories through bridge leadership. This final layer facilitates understanding the nature of social justice and more importantly, the ways in which social justice might be eventually realized (Cribb & Gewirtz, 2005), by conveying actions, daily practices, and the

language of leaders who work as bridge people. Bridge leaders connect theory to practice.

Tooms and Boske (2010) substantiate bridge leadership is seen in the leader who “understands that the core of her or his work is rooted in traversing spaces between people. These spaces cut across a gamut of parameters that include equity, opportunity, and productivity. Furthermore, the spaces are not bound by time or geography” (p. xviii). This understanding may be found within public administration and school business leaders committed to consistent, every day and ordinary practices (Tooms & Boske, 2010), seeking and providing necessary resources in fair and equitable fashion. In order to better understand the application of critical social theory and leadership for social justice theory to bridge leadership, the precepts of each of these theories is considered.

Critical Theory Defined

One of the earliest critical theorists, Max Horkheimer, determined traditional theory only reflects the current situation, while critical theory acts to change the situation (Crotty, 2007). While researchers find it hard to agree upon a precise definition of critical theory, Bogdan and Biklen (2007) characterized it in the context of social organization, emphasizing those conditions which privilege some while stifling others. They considered critical theory to be a group of theories, all with similar features and all especially interested in issues of gender, race, class, and in the ways in which power is differentiated in society. Critical theorists saw this research tool as political, for the purpose of changing educational and social inequalities. Some employed critical research to challenge colorblindness and meritocracy, and to explore racial thinking (Bernal, 2002) and most utilized it as a means to advocate for equity (McKenzie & Scheurich, 2004). It has been common for the critical theorist to challenge existing power structures and the policies guiding educational practices (Beswick, Sloat, & Willms, 2008; Merriam & Associates, 2002),

especially for the purpose of empowering those marginalized in society and transforming inequalities and social injustices apparent in public education (Bogdan & Biklen, 2007). Well established, critical social theory substantiates the reality that most institutions perpetuate and reproduce inequitable power structures through policies and practices (Dantley & Tillman, 2006).

Application of this critical perspective to public education has allowed researchers to consider education as an institution created for the purpose of social and cultural reproduction, and call for its transformation. This perspective has been viewed as “an ideological critique of power, privilege, and oppression in areas of educational practice” (Merriam, 1998, p. 4), allowing research to establish why and how some educational institutions reproduce inequities while others transform practices which benefit every sector of society. Likewise, the critical theorist has been especially suspicious of constructed meanings handed down through time within cultures, such as educational institutions, because they tend to serve hegemonic interests. Socially constructed meanings, often a by-product of a particular culture, arise to further the purposes of those with the most power. It is within these constructed meanings where power structures are sustained, where oppression becomes the norm, and where efforts to overcome inequities are most often squelched (Crotty, 2007).

In keeping with the earliest critical theorists’ intent, critical theory should seek to change a situation. Critical perspectives were designed to empower human beings to overcome constraints such as racism, classism, and gender inequities (Creswell, 2007). Derived from critical social theory and equally affecting change, current literature provides extensive connections of leadership for social justice theory to the concepts of marginalization and

exclusionary practices as well (Brooks, et al., 2007; Jean-Marie, 2008; Marshall & Oliva, 2006; Theoharis, 2009; Theoharis & Causton-Theoharis, 2008).

Leadership for Social Justice Theory

Issues of social justice linked to leadership in education have become more evident in scholarly literature (Larson & Murtadha, 2002; Theoharis, 2009), and it is important to recognize how social justice is understood by current theorists. Much like critical social theory, Bogotch (2002) suggested social justice cannot be defined, rather the construct of social justice takes on a shared meaning within a given time period. McKenzie & Scheurich (2004) supported the premise that one meaning for social justice cannot “be universally applied in every situation, with every marginalized individual, in the same way”(p. 114). Responding to this lack of definition, Grogan (2010) asserted the concept or definition of social justice should not be limited or too narrowly ascribed as this may suppress the quality and quantity of research necessary to eliminate inequitable policies and practices.

There appears to be interest among researchers to connect everyday practices of school leaders to the theories underlying social justice perspectives (Larson & Murtadha, 2002). However, applying a critical lens does not necessarily empower or transform (Cannella & Lincoln, 2009), and embracing the language of social justice research is not substantial in and of itself (Larson & Murtadha, 2002). Considered a commendable goal for research in public education, “most of this research fails to articulate or advance these principles within the theories, frameworks, or methodologies employed” (Larson & Murtadha, 2002, p. 135). In light of this, social justice cannot be separated from the daily practices of the school leader. Theoharis (2007) defined principals who enact social justice leadership as those who “make issues of race, class, gender, disability, sexual orientation, and other historically and currently marginalizing

conditions in the United States central to their advocacy, leadership, practice, and vision” (p. 214). Regardless of the definition or lack thereof, there has been agreement educational leaders must understand social justice issues especially necessary to meet the achievement of all learners (Capper, Theoharis, & Sebastian, 2006; Furman & Gruenewald, 2004; Theoharis, 2009). Connecting bridge leadership to critical social theory and leadership for social justice theory allows the critical researcher to do more than simply critique what exists. As in the example provided by Theoharis (2007), the construct of bridge people provides a direct connection between theory and practice and advances the principles of social justice and critical social theory through example.

Bridge People and Leadership

Bridge leadership points to positive examples of a more just and better world. Borrowing a phrase from an interview participant, Merchant and Shoho (2006) define bridge people as civic and educational leaders who incorporate thinking about issues of social justice into their daily practice, those who are “committed to creating a bridge between themselves and others, for the purpose of improving the lives of all those with whom they worked”(p. 86). Their study determined leaders who are committed to issues of social justice and equity often share common characteristics. These include a strong orientation toward social justice and equity instilled in their early years; a strong sense of purpose and belief to help them overcome obstacles; powerful experiences of marginalization which shaped their determination to fight against injustices for all; and an awareness of the influence of the sociopolitical movements of the 1950s and 1960s (Merchant & Shoho, 2006).

Researchers have further connected the construct of bridge people to educational leaders and services (Brooks, et al., 2007). Educational leaders who are bridge people focus on an

agenda for social justice that includes decreasing the achievement gap, increasing the quality of schools for all students, and providing necessary resources. These school leaders personify social justice in everyday work, affecting policies, practices, issues of equity and increased student achievement. Brooks, et al (2007) ultimately connected the practices of bridge people to the work of the school business administrator by stating, “Mobilizing and generating resources to strengthen initiatives that contribute to achieving social justice is an essential part of effective leadership” (p. 383). He suggested 21st century educational leaders face many challenges which include “closing the achievement gap, ensuring student safety, hiring and developing high quality teachers, and stretching allocated funds to operate schools”(p. 382). Whereas all of these important issues carry social justice to educational settings, it is important to recognize the mantra of the social justice agenda is about achieving equity and excellence in education for all children, regardless of race, culture, or background (Brooks, et al., 2007; Marshall & Oliva, 2006).

Researchers have shown school leaders who work as bridge leaders focus on the conditions that have perpetuated historical inequities in schools and work to change the institutional practices and the culture of schools that support inequities affecting marginalized students (Cambron-McCabe & McCarthy, 2005; Gadsen, 2009; Lallas & Morgan, 2006; McKenzie & Scheurich, 2004; McMahon, 2007). These leaders understand and incorporate elements of social justice into every aspect of leadership. They resist implementing incremental reforms which only add more layers to an already complex system, and focus on the necessity of reconstructing “roles and relationships at the school level around a vibrant core purpose focused on social justice and directed at improving student learning” (Cambron-McCabe & McCarthy, 2005, p. 216). Likewise, bridge leadership practices provide high quality instructional skills and

high quality professional development to support learning of both students and adults in the school setting. These school leaders question policies and practices and taken-for-granted structures and norms that weaken or completely remove the opportunities many students have to achieve academic success and to have equitable learning experiences. Most importantly, researchers have advocated for a new kind of leadership within public schools, bridge leadership, which considers the learning of every student more important than common management practices and daily operations (Cambron-McCabe & McCarthy, 2005). McKenzie & Scheurich (2004) further advocated for school leaders to participate in constantly asking questions from a critical perspective.

What are we doing? Why are we doing it? What do we value? Why do we value what we do? How are our values evident or not evident in our practice? How is what we're doing affecting students? Is what we're doing privileging one group over another? Is what we're doing working for all students, why or why not? Are our practices transparent? Is our leadership transparent? (pp. 213-214).

This same principal of critical questioning has been applied to the field of public administration (Frederickson, 1990). "To say that a service may be well managed and that a service may be efficient and economical, still begs these questions: Well managed for whom? Efficient for whom? Economical for whom?" (p. 228). It would appear these critical and reflective questions that support promoting social justice and equity would be appropriate for leadership in all sectors, at all levels, and may be considered as vital in the work of the school business administrator in providing bridge leadership.

Terms such as social justice and equity are not necessarily part of the language of school business administrators. Perhaps critical issues concerning equity and privilege should be

acknowledged and addressed within leadership involving the SBO in support of collective responsibility for school improvement. These practices and resources are not only potentially supported by the work of the SBO, but they call upon the school business leader to participate in professional growth experiences that help promote understanding the connection marginalization and inequity within public education has to their own work. If this is so, then one must first understand how socially just practices are understood in the current standards and work of the school business official.

Review of the Research and Related Literature

The following literature review provides information and highlights previous research to help extend understanding and knowledge of the complexities of school finance, and the field of school business administration. It also connects the pervasive issue of social injustice in public education to the context of the school business administrator's work. SBO accepted practices guided by the Association of School Business Officials International (ASBO) are reviewed to help the reader understand the current perspective of the SBO. A review of the literature associated with school finance and historical fiscal inequities is followed by a section which elevates disparities in student achievement and resources between dominant and non-dominant groups. The final section of literature review establishes emerging practices in school resource management intended to better address issues of social justice and achievement.

ASBO Professional Standards

Professional standards for school district leaders help clarify roles and responsibilities in areas of organizational, public and instructional leadership, as well as provide guidance on ethical behavior, minimum qualifications, and relevant state regulations. Professional leadership standards are increasingly connected to student system-wide achievement (Task Force on School

District Leadership, 2001). As with other professions, school business administrators have been guided by professional standards. These standards support the work of the current school business professional and provide a framework for pre-service and professional development experiences. They also provide accreditation standards for higher education training and certification standards for the profession. In March 2006, ASBO released its 2nd edition of the International School Business Management Professional Standards and Code of Ethics, which detailed nearly 200 professional standards and a 28-point ethical code that included standards, conduct, and expectations of personal and professional integrity (See Appendix A for the complete list of standards). These standards address both technical and leadership skills directly related to the work of SBOs (Association of School Business Officials International, 2006).

Reconsidering the Role of the SBO

Just as expectations for public education have substantially changed over several decades, so have expectations for SBO roles and responsibilities. Preparing, analyzing, and reporting budgets and financial statements, conventional control functions that have long dominated the field of school business administration, are now being infused with essential leadership skills (Association of School Business Officials International, 2006; McClain Jr & King, 2009). SBOs have become vital members of district leadership teams and can often provide a strong voice in strategic planning and district-level decision-making, and not just those concerned with fiscal management (McClain Jr & King, 2009; Ray, et al., 2001; Task Force on School District Leadership, 2001). Likewise, SBOs are now called upon to better understand issues connecting resource management to student achievement and social justice (Cambron-McCabe & McCarthy, 2005; Lallas & Morgan, 2006; Marshall & Oliva, 2006).

Marshall and Oliva (2006) supported rethinking the role of the SBO. They conveyed leaders in education, with technical and managerial skills alone, would fail to meet the realities of contemporary challenges in education. Recognizing everyone involved in better management of schools should be aware of issues of equity and the achievement gap, these authors stated “to get to the heart and spirit of the matter, we need to move beyond the technical” (p. xv).

Cambron-McCabe & McCarthy (2005) believed the focus of educating school leaders has more often addressed technical effectiveness and efficiency as well. While technical expertise is valid, these authors suggested ignoring the skill sets necessary for administrators to better understand values, attitudes, and behaviors evident in the school community could undermine efforts to substantially affect issues of educational injustices. Similarly, higher education faculty who train educational leaders are more than ever called to integrate important technical skills with “beliefs that emphasize educational justice, ethical values, equity, care and respect” (Lalas & Morgan, 2006, p. 23).

Survey results reported in a recent article published in the *ASBO School Business Affairs Journal* (McClain & King, 2009) indicate, however, SBOs clearly value control functions and technical aspects of their job over leadership. Most agreed budget, financial resource management, administration, and compliance are their most essential job functions, and they ranked technical skills more highly than leadership skills (McClain Jr & King, 2009). McClain and King’s (2009) study was designed to elicit SBOs perceptions of whether or not leadership skills are important to the evolving role of the school business official. The online survey asked participants to identify the degree to which specified technical and leadership skills were necessary in fulfilling job responsibilities. Fifteen performance roles composed the leadership skill set in the survey, along with 33 technical skills, all listed in ASBO professional standards.

Based on survey results, SBOs determined ten of the thirty-three technical skills were most essential. Highest rated technical and control function skills on the survey were as follows: analyze and manage budgets; gather and organize information; prepare, analyze and report financial information; present financial data; solve problems and resolve conflicts; know and apply ethical frameworks; forecast revenue sources; develop an operational plan; prepare a budget calendar; and interpret school finance funding models. Seven of the highest-rated technical skills addressed job functions specific to the area of financial resource management. The authors stated, “All ten of the technical skills listed were more highly rated than the highest-ranked leadership skills” (McClain Jr & King, 2009, p. 10).

Highest ranked leadership skills on the survey included modeling core organizational values and personal principles; developing change-friendly culture; supporting organizational purpose and vision; employing a client focus; restructuring the organization; and involving everyone in productive change. McClain and King (2009) concluded SBOs view technical skills as more essential than leadership skills in their positions, and suggested “Because SBOs are critical members of districts’ leadership teams, and because they need to have an effective voice in making strategic decisions, we believe ASBO should make leadership skills a stronger component of the professional standards” (p. 11).

These survey results, however, contrasted sharply with what the ASBO organization and literature portray as emergent and necessary roles in school business administration. ASBO has recognized researchers, as well as the general public, are more attentive to the relationship between a school or district’s sound business practices and the quality of education provided its students. Additionally, this organization has established school districts should operate within an efficient and effective business and financial framework in order to successfully meet the needs

of diverse and challenging populations of students (Association of School Business Officials International, 2006).

Political forces have also significantly changed the nature and character of school business administration. More than ever, this specialized group of administrators has been asked to understand and contribute to instructional effectiveness, to collaborate with key decision makers, and to maximize financial resources in order to best achieve educational goals tied to student achievement (Ray, et al., 2001). An emphasis on collaboration becomes even more important in times of crippling budget cuts to public schools, especially given the historical environment of fiscal inequities in public education. Although members of the administrative team often dialogue about district issues, many view this role as required to protect one's interest, even more so when lose of dollars are at stake. Levenson (2010) states, "Running a school district is a team sport, despite the long tradition of silos, walls, and isolation" (p. 243). He suggests districts would do well to invest in professional development to improve and facilitate teamwork so the leadership team can maximize collaboration and planning. Experienced as a district superintendent, Levenson (2010) applied this teaming approach to budget development. He states, "Developing the budget as a team also saved the district millions of dollars and allowed our most effective programs to continue despite a shrinking budget" (p. 243).

Education Finance

School finance in the 21st century faces a complex and challenging task: how to best use resources within the financing system to promote high student achievement with all groups of students (Glenn, 2006; Ladd & Hansen, 1999; Wong & Casing, 2010). The goal of ensuring all students learn and achieve to high standards no longer allows the school business administrator

to conduct business as usual because it connects school finance and the work of the SBO directly to the intent and purpose of education. Likewise, the use and distribution of resources becomes even more essential when considering the goal of improving achievement for all learners (Ladd & Hansen, 1999; Odden & Archibald, 2001; Ramsey, 2001). Conversely, Ladd and Hanson (1999) stated, “There are, however, no easy solutions to this challenge, because values are in conflict, conditions vary widely from place to place, and knowledge about the link between resources and learning is incomplete” (p. 1). In fact, many problems related to financing education remain unsolved.

One of the most glaring concerns is the continued and significant difficulty in providing a high-quality education that is equitable to all students. The inequitable and inadequate distribution of educational resources and the persistent achievement gap between middle class whites and other categories of students is well established (Burrup, et al., 1996; Figlio, 2004; Glenn, 2009; Ladd, Chalk, & Hansen, 1999; Lee & Wong, 2004; Lukemeyer, 2004; Maidens & Stearns, 2007; Oakes & Lipton, 2002). Researchers and policymakers have agreed additional resources must be provided to those students who come from poor or disadvantaged backgrounds, as well as for students with handicapping conditions, in order to reduce the well documented disparity in achievement (Cambron-McCabe & McCarthy, 2005; Glenn, 2006; Lukemeyer, 2004; Maidens & Stearns, 2007; Oakes & Lipton, 2002; Ryan, 1999; Verstegen & Jordan, 2009; Vesely, et al., 2008). Even as inequalities in educating all students to high standards has resulted in contentious debate, so have historical discussions centered on how best to fund schooling to meet that same goal. Springer, Houck, and Guthrie (2007) stated, “Much of modern education finance policy is rooted in questions that have persisted over 100 years” (p. 3).

Financing education has always been considered complex and muddled because of the lack of standardization across districts, states, and the nation. Although federal, state, and local government have all played a significant role in political and financial support for public education, the function of each level specific to generating revenue and distributing resources has varied across time and from state to state. Largely considered a task of the state by the U.S. Supreme Court, researchers have also recognized each state has its own system of finance to fund public education (Burrup, et al., 1996; Springer, et al., 2007). Initially, many states supported local tax efforts to operate schools but this was quickly recognized as problematic as public school systems grew in size. Still unresolved today, Burrup, Brimley, & Garfield (1996) stated,

Extremely wide differences in local taxpaying ability to meet the costs of education in hundreds of school districts in a state make a mockery of the theory of equality of educational opportunity for all school pupils, unless the state does something to help financially weak districts (p. 175).

Financial support to public schools from the three levels of government was intended to provide revenue stability and has historically insulated schools from economic sway (Guthrie & Peng, 2010). Even as equality of educational opportunity remains an arena for debate, varied theories of financing public schools have evolved over time. However, personal property taxation, which became the key source of revenue in the early 1900s, still remains the primary source of state support for public schools today (Burrup, et al., 1996).

The federal government has also appropriated money throughout the past century to sustain state-generated funding of education, often for the purpose of influencing national priorities in education policy. Expanding access and equity to all public education students with

the passage of Title I of the 1965 Elementary and Secondary Education Act was connected to the civil rights movement and a national concern with poverty (Guthrie, Garms, & Pierce, 1988; Spring, 2005). Considered one of the most important pieces of federal legislation in modern history, the Elementary and Secondary Education Act has, more recently, been reauthorized to advance school reform with the passage of the 1998 Comprehensive School Reform Act and the 2001 No Child Left Behind Act (Springer, et al., 2007). This legislation was fundamentally connected to school finance through the federal appropriation of considerable dollars to state departments of education. Guthrie & Peng (2010) state, “Appropriations from this legislation pumped federal spending all the way to the then unheard of level of 8 percent of total school revenues (p. 33).” Federal funding brought with it a new era of accountability, and vocal support or opposition to this new federal influence. With federal appropriations, Springer, Houck and Guthrie (2007) acknowledged school lawsuits at the state level became much more common, centering on education finance equity in the early 1970s and around issues of adequacy in more recent history. The complexity of school finance has become even more exacerbated in light of the ongoing and highly politicized debate over how best to define equity and adequacy, and the resulting litigation that has occurred in most, if not all, states.

Brown v. Board of Education of Topeka, 347 U.S. 483, 1954 (Hunter, 2009) provided the earliest example of litigation related to contemporary school finance issues. Although this lawsuit focused primarily on the racial context of separate but not equal, segregated schools were notably resource-deprived compared to white middle and upper class schools. In the decade following this historic lawsuit, lawyers moved toward school finance litigation to improve educational opportunities for disadvantaged and impoverished children. This allowed plaintiffs to elevate the issue of disparity of resources between schools. Arguing this difference in

available resources contributed to or even caused obvious achievement gaps, early school finance litigation focused more on economic inequalities than previously litigated racial inequalities (Glenn, 2006; Maidens & Stearns, 2007). Advocates involved in school finance cases endeavored to equalize per pupil funding across districts within a state, removing property wealth from the school funding equation and redistributing equal amounts of funding across those same district (Downes & Stiefel, 2007; Glenn, 2006).

Still resolute in reducing or even eliminating the achievement gap, later school finance cases focused more on adequacy. The concept of adequacy aimed to establish an objective standard or a defined minimum amount of resources required to educate students to meet high standards (Baker & Green, 2007; Downes & Stiefel, 2007). Less concerned with differences between school districts and more concerned with actual and available resources, Glenn (2006) reminded the purpose of this type of litigation is “a social justice result related to a differential improvement in achievement of students living in poverty and children of color. Such an improvement would serve the objective of reducing or ideally, eliminating the achievement gaps that plague the nation” (p. 68). Researchers, however, are not convinced, suggesting a variety of ways in which equity in school funding could be measured and disagreeing on actual meanings of terms such as equity and equality (Espinoza, 2007; Figlio, 2004; Glenn, 2006; Ryan, 1999). Lukemeyer (2004) reminded, “Different people may define school finance equity differently, and different definitions of an equitable school finance system can imply very different distributions of school spending, school resources, and student outcomes” (p. 65).

Contributing as well to the complexity of education finance is discourse suggesting the U.S. education system reproduces existing hierarchies of power in order to

maintain the status quo (Glenn, 2009; Oakes & Lipton, 2002; Rorrer & Lugg, 2006).

Specifically, Apple (2008) stated

Thus, existing structures of economic and cultural power often lead to a situation in which what may have started out in some educators' or legislators' minds as an attempt to make things better, in the end is all too usually transformed into another set of mechanisms for social stratification (p. 344).

Wong (1994) substantiated governing structures played an injurious role in education funding and resource allocation despite an abundance of public policy at every level dealing with issues of equity. According to Wong, policies enacted by three political levels of governance – federal, state, and local – “have largely failed to close the resource gap between rich and poor districts and within districts, between schools in stable neighborhoods and those in poor neighborhoods” (p. 282). Understandably, policy makers at the federal, state, and local level affect resource allocation. Further research has substantiated the impact of these decisions on student achievement.

All Students and Achievement

As established, school financial resources should support improved student achievement. Essentially, school finance provides the funding to support school operations and provides resources to create effective learning environments. Wong and Casing (2010) stated, “The challenge of proper school finance goes beyond a balanced budget to strategies that maximize money power to improve schools and equalize student achievement” (p. xv). However, recent accountability mandates such as No Child Left Behind have discredited historical uses of funding by elevating the increasingly large performance gaps in the achievement of Caucasian students compared to the achievement of African-American, Hispanic, and economically

disadvantaged students (Cambron-McCabe & McCarthy, 2005; Ryan, 1999; Theoharis, 2009). Ample research provides evidence documenting continued discrepancy in accessible education between historically marginalized groups of students and their white middle and upper class peers (Brooks, et al., 2007; Jean-Marie, 2008; Marshall & Oliva, 2006; Theoharis, 2009; Theoharis & Causton-Theoharis, 2008). Researchers have concurred there is also substantial evidence showing Hispanic and other minority student populations in U.S. public schools continue to increase as does the growing achievement gap and drop-out rate in these same populations (Edwards, 2009; Ek, 2008; Gonzalez, 2009; Haycock, 2001; Jodry, 2004; Marx, 2008; Ornstein & Levine, 1989). Research further indicated disabled students and students of poverty, regardless of race, are at a greater risk of academic failure and much lower graduation rates (Vesely, et al., 2008). Cambron-McCabe and McCarthy (2005) suggested these discrepancies exist because of the differences in “curriculum taught, resources spent, how teachers are assigned, and achievement expected” (p. 201). Appropriate leadership and available funding and resource allocation are often the common denominator in whether or not students have access and opportunity to achieve. Wong and Casing (2010) stated, “Educational programs and opportunities are a direct result of the financial support to the schools” (p. 104).

Potentially Effective Leadership Practices in Resource Allocation

A small, but growing base of research has surfaced that connects leadership practices in resource allocation to equalized student achievement. Less research is available to help district leaders know how to do more with less in a difficult economic environment. Hess (2010) states, “Even as we ask district and school leaders to do more with less, we see a research landscape that offers remarkably little analysis or guidance on how they should proceed” (p.12).

Finding resources for reform especially in times of budget reductions requires examination of every dollar and rethinking how a district organizes and uses available resources (Hawley-Mills & Darling-Hammond, 1997). Some researchers have suggested everyone involved in funding decisions should have adequate understanding of improving basic requirements for education to include qualified teachers, adequate facilities, staff professional development, and appropriate class sizes (Rebell & Wardenski, 2004; Slavin, 1997). Likewise, the school business leader can become familiar with the policies, programs, and practices that have the greatest payoff in higher achievement, especially for marginalized students who have potentially suffered from inequitable funding policies. Case (2004) agreed and reminded the school leader to “choose the most effective programs on which to spend educational reform money” and “be completely ethical and correct in the processes that are used in spending public money” (p. 121). Furthermore, leaders should “not squander precious time [or resources] on unproven programs” (Case, 2004, p. 123).

Hawley-Mills and Darling-Hammond (1997) provided research to help schools rethink the use of time and teaching resources. Their research suggests reducing specialized programs to create more generalized roles for teachers and core academic programs in which all students participate. They also promote adapting flexible instructional grouping targeted to individual student needs; reducing the number of students a teacher has responsibility for teaching; providing more common time for teacher planning and learning; establishing longer class periods and flexible scheduling; and developing flexible staff roles and/or job descriptions and work days. Intended to realize more with fewer dollars, less can be accomplished without collaborative and collegial relationships between the SBO, other district level administrators, and the larger staff and community.

Grubb (2009) established the importance of collective and collaborative responsibility for school improvement by suggesting evidence against schools whose participants act in isolation is quite strong, especially in underperforming schools. Of course, the superintendent of schools should administer the budget and the school board has legal authority for adopting the budget. However, Burrup, Brimley and Garfield (1996) reminded the SBO of their involvement as “the superintendent should work with the entire staff in order to provide an instrument [the budget] that reflects the goals and objectives of the district” (p. 298). Likewise, schools are more likely to be successful in the appropriate allocation of resources when a comprehensive vision is in place to include goals for student achievement, educational strategies, and appropriate organization to accomplish stated goals (Hawley-Mills & Darling-Hammond, 1997). Hawley and Darling-Hammond (1997) stated, “resource reallocation and the design of an instructional vision and strategy are inextricably intertwined. Restructuring resources makes no sense without an underlying educational design” (p. 42). Involvement throughout this strategic process can provide further opportunity for SBO collaboration with district leaders and better understanding of district-wide efforts to dissolve inequities and meet the challenges of student diversity.

With the most recent focus on dire economy and the impact this has on public education, some researchers are calling on school administrators and school business officials to take this opportunity to really evaluate where dollars are best spent. Roza (2010) suggests there may not be easy answers and school leaders cannot “escape the tough thinking that needs to be done about how to do more with less” (p. 95). Most importantly, she believes the goal is to “figure out how to allow students access to those services by spending money in different ways and at reduced costs” (p. 95).

CHAPTER 3

RESEARCH DESIGN AND METHODOLOGY

The researcher conducted the study using a critical qualitative approach. Qualitative research gives power to individual story and allows the researcher to hear the voice of the participants, paying “closer attention to the interpretive nature of inquiry and situating the study within the political, social, and cultural context of the researcher, the participants, and the readers of a study” (Creswell, 2007, p. 37). Understanding comes through analysis of the practices and language used by SBOs in addressing essential functions of the business official, and the professional values represented in those essential functions. Added understanding comes from analyzing SBOs perspectives on issues of collegiality and collaboration, as well as social justice and equity within the context of their jobs, and their understanding of factors that contribute to disparity in achievement when comparing minority and disadvantaged groups of students to white middle and upper class students.

Qualitative Research

Creswell (2007) stated, “Qualitative research begins with assumptions, a worldview, the possible use of a theoretical lens, and the study of research problems inquiring into the meaning individuals or groups ascribe to a social or human problem” (p. 37). Qualitative researchers are interested in constructions and interpretations of reality at a particular point in time and in a particular context or how people make sense of their world and experiences within their world (Bogdan & Biklen, 2007; Merriam, 1998; Merriam & Associates, 2002). Qualitative research seeks to understand the phenomenon of interest from the participants’ perspective where the researcher is the primary instrument for data collection. This type of research usually involves

some type of fieldwork, is inductive by nature, and is richly descriptive (Merriam, 1998). Bogdan and Biklen (2007) suggested five features define all qualitative research in varying degrees to include research taking place in the natural setting, research as descriptive allowing words and pictures to emerge, a concern with process, inductive analysis of data, and a focus on understanding meaning or “how different people make sense of their lives” (p. 7).

The Critical Perspective

Qualitative research paired with the critical perspective allows the researcher to “uncover, examine, and critique the social, cultural, and psychological assumptions that structure and limit our ways of thinking and being in the world” (Merriam & Associates, 2002, p. 9). Critical research is not always defined by one set of methods. The choice of the research project, the research questions, the data collection and interpretation of the data are meant to be guided by the critical theoretical perspective allowing the researcher to elevate societal power structures (Sandlin, 2002). Although the critical theorist comes to research with established and influential ideas about race, gender, and issues of social justice, their theories and ideological views are influenced by the perspectives of their informants (Bogdan & Biklen, 2007). Likewise, the critical perspective generally critiques social structures and power relationships, but “should point to positive possibilities and articulate a better, more just, vision of the world” (Sandlin, 2002, p. 373) Although considered more challenging and often neglected when taking a critical stance, defining positive alternatives is necessary to facilitate change in practices (Sandlin, 2002).

Data Collection Plan

For this qualitative study, the researcher used telephone interviews with follow-up e-mails as needed for clarification for the major source of data collection. One-on-one interviews

via telephone access were conducted with 14 working U.S. school business administrators who are within their first ten years in the field and members of an ASBO Bridges to the Future cohort group, which is described below. School business leaders newer to the field were selected because they are confronted not only by inexperience, but also by increased pressure to provide necessary resources to meet the challenges of NCLB and increased accountability for achievement results.

Participants were selected for telephone interviews using purposeful sampling. According to Creswell (2007), purposeful sampling means “the inquirer selects individuals and sites for study because they can purposefully inform an understanding of the research problem” (p. 125). Bogdan and Biklen (2007) supported this by stating one chooses particular subjects to include in purposeful sampling, “because they are believed to facilitate the expansion of the developing theory” (p. 73). Each research participant was a current member of ASBO and a current or former scholarship recipient of the ASBO Bridges to the Future leadership initiative. These scholarship recipients are school business officials in the profession for five years or less and who are members of ASBO International. Initiated in 2006, the Bridges to the Future program provides twenty scholarships of \$2,000.00 each year for new and aspiring school business leaders to attend the annual convention and leadership conference for the purpose of gaining a network of colleagues, experiencing ASBO professional development, and better understanding the resources available to ASBO members. ASBO membership provides online access to members around the world using detailed search criteria. By querying demographic information, the researcher can search members by characteristics such as school district enrollment, budget size, job classification, and management interests. This provided an initial list allowing the researcher to conduct purposeful sampling from throughout the United States. From this initial

list, the researcher intended to seek maximum diversity in participation when possible. Criteria for diversity included gender, race, location and size of district, and school business officials trained from various fields and/or educational backgrounds. The researcher believed it to be especially important to include school business administrators who come from an accounting or business background, as well as SBOs who come from the field of public education. In the event there were not enough respondents within this select group that specifically work in the area of school finance, the larger ASBO group of school business administrators was available for interview selection. The flexible nature of this research design provided the opportunity for more or fewer participants to be interviewed for the study and data collection was suspended when the point of redundancy was reached. Selecting participants in this manner presented an opportunity to collect rich, descriptive data drawn from the experiences of those newer to the profession, as well as identify areas that may need addressed in SBO training and professional development in order to better prepare present and future school business leaders for challenging work in public education.

Interviews

Interviewing is one of the most common data collection forms in qualitative studies (Merriam, 1998), and telephone interviews was the primary source of data collection in this particular study. It was the intent of the researcher to conduct online interviews through “person-to-person encounter in which one person [the researcher] elicits information from another” (Merriam, 1998, p. 71). Online interviewing in qualitative research has emerged as a data practice within the last ten years as it allows wider geographical access to research participants and is considered conducive to easy dialogue (Ayling & Mewse, 2009; Kitto & Barnett, 2007; Mann & Stewart, 2000). However, the researcher found that most school business officials did

not have access to Skype in their workplace setting. Several selected interviewees were not familiar with Skype or other tools to conduct online interviews. As an alternative method, telephone interviews were conducted with all participants. The researcher determined it best to conduct all interviews using the same method rather than conduct some via online access and others via telephone only. Telephone interviewing has been considered a way to provide the researcher the best source of information when he or she does not have direct access to individuals, as was the case in this study (Creswell, 2007).

The decision to use interviewing as the primary mode of data collection was based on the kind of information required to inform this study. In order to best explore participant thinking, the researcher used a semi-structured interview format, allowing the “researcher to respond to the situation at hand, to the emerging worldview of the respondent, and to new ideas on the topic” (Merriam, 1998, p. 74). Interviews with 14 school business leaders were conducted to gain a wide range of perspectives, as well as data saturation. Approximately ten questions were developed for interviews to guide the telephone conversation and organize the discussion to appropriately engage participants without threatening them. Questions were field-tested with three Kansas school business officials prior to the start of official interviews. Although only one of the individuals was newer to the field of school business and none of those used for field testing were members of a Bridges to the Future cohort, field testing allowed the researcher to determine if original questions prompted respondents to answer in ways that addressed the research questions. After field testing, two additional questions were added along with several prompts seeking clarification or additional information. The researcher asked follow-up question as responses were generated (Krueger, 1998). The researcher, serving as interviewer, ensured all participants had an opportunity to share ideas and opinions. Interviews conducted via the

telephone were recorded and later transcribed. The researcher asked each participant for permission to record the telephone interview prior to starting informal questioning. If follow up e-mails were required for clarification, e-mail responses were saved, dated, and later coded for transcription and data analysis. Interview questions are included in Appendix B. Participants were assured confidentiality and participation in interviews was strictly voluntary. The researcher introduced himself and the study to each participant via a preliminary telephone call. It was during this phone call that the researcher asked if the participant would be part of the study. If participants indicated a willingness to participate in the study, the researcher sent a written consent form providing further information. Prior to the interview, participants were asked to sign and date a consent form and send the signed form back to the researcher by mail, or scan the signed consent form and send it through email to the researcher. Consent forms are included in Appendix C.

Data Analysis

Data emerging from telephone interviews were analyzed using the constant comparative method. The researcher drew upon a particular incident from an interview and compared it with another incident within the same set of data or from another data set (Merriam, 1998; Merriam & Associates, 2002). Continual comparisons of respondents' remarks led to categories and themes, "informed by the study's purpose, the investigator's orientation and knowledge, and the meanings made explicit by the participants themselves" (Merriam, 1998, p. 179). For the purpose of this study, data collected from interviews were transcribed and organized in a data file. The researcher read through transcribed text and made notes to form initial coding. Rich descriptive was drawn from the text as well, such as descriptions of participants, settings, and events. Data was analyzed and codified within categories of themes and patterned regularities (Creswell,

2007). Email responses to follow-up questions were also coded, compared to developing data sets, and merged into themes.

Research Quality

Qualitative studies, as other studies, should be conducted with rigor, present insight, and conclusions that affect practice and/or the theory of education. Application of educational inquiry requires reliable and valid construction of the component parts in qualitative study (Bogdan & Biklen, 2007; Merriam, 1998). The qualitative researcher approaches the “study’s conceptualization and the way in which the data were collected, analyzed, and interpreted, and the way in which the findings are presented” (Merriam, 1998, pp. 199-200) with careful attention. However, different types of research are based upon different assumptions. The researcher’s theoretical perspective may lead to searching for and defending the criteria that best applies to the research study. When the goal is promoting social change, qualitative researchers “engage in dialogue with their informants about their analysis of observed and reported events and activities. They encourage information to gain control over their experiences in their analysis of them” (Bogdan & Biklen, 2007, p. 43). Wolcott (2002) agreed the researcher should strive more for understanding than validity. Regardless, the researcher should remember that in qualitative research, “what is being observed are people’s constructions of reality – how they understand the world” (Merriam, 1998, p. 203). Data collection is derived from people and the researcher interprets their reality through interviews and observations, and through the perspective of the researcher. Merriam (1998) provided six basic strategies to consider when conducting qualitative research to include triangulation of data, member checks, long-term observation, peer examination, participatory or collaborative models of research, and clarification of researcher’s assumptions and biases.

With the exception of long-term observation, this study incorporated each of Merriam's criteria to better promote internal validity. Incorporating more of a holistic approach to ensure validity, research was conducted using multiple perspectives and multiple sources of data to include interviewing 14 school business administrators. Throughout the data collection process, interpretations were taken back to participants to check plausibility of results. Emergent findings were reviewed by peers and university faculty during data collection. Researcher assumptions, biases, and worldviews were incorporated into this study as the researcher also became a participant.

Ethical constructs for qualitative research were followed throughout this study, both in development of the research project and in data collection. Interviewing as a research method provides opportunities for the qualitative researcher to risk ethical violation and care was taken to ensure participant privacy and care in data collection and analysis.

Researcher Positionality

When data are collected and interpreted within a critical social theory framework, the researcher often "takes a strong stand on issues, exposing injustices and naming them for what they are" (Sandlin, 2002, p. 372). It then becomes necessary for the researcher to not assume too much power in the interview process such that participants can provide the phenomenon of interest from their own perspective. I came to this research study with inherent beliefs about practices within school business administration that promote inequities and injustices. Although I am currently a practicing school business administrator and former Bridges to the Future scholarship recipient, my training is through the field of education rather than accounting or business management. Participation in state and national school business organizations allowed access to business officials who were newer to the field of school business administration, and

who should have knowledge of current practices and thinking in school finance, resource allocation, and school business management.

I was interested in this study because I have seen the value of collaborative efforts in helping all students achieve to high standards despite ethnicity, socio-economic status, or exceptionalities. I have recognized the important role the school business administrator can have in working collaboratively with district level leaders to best apply resources and advocate for marginalized students. Likewise, I have seen firsthand the practices and policies in public education that promote and maintain oppression and isolation. The words of Theoharis (2009) reflect my own thinking as he wrote

The need for examples of school leaders who maintain a fierce commitment to issues of equity and social justice, for description of and reflection on what they achieved and the strategies they developed to do so, is critical to fulfillment of our nation's promise to provide the leaders our children deserve (p. xiii).

This description of the school business leader who is collaborative and committed to issues of equity, social justice, and student achievement is missing from the rhetoric, and emergent research promises to provide contribution to what is possible in public education.

CHAPTER 4

FINDINGS: BRIDGES TO THE FUTURE SBOs PERSPECTIVES

Information for this chapter is provided from the codification of participant interviews by identifying essential categories or themes which emerged from discussions with respondents. The categories identified during this process included information about districts represented, diversity within the student population of the district, why the participant became a school business official, most important issues in the SBOs current professional context, SBO perceptions of student achievement within the district, SBOs perception of their connection to student achievement, perceptions of the importance of collaboration, and SBO perceptions of best practices within the field of school business during the difficult economic and political context of public education.

Demographics of ASBO and Bridges to the Future

ASBO International was organized in 1910 for the purpose of providing programs and services to school business officials and support SBOs in professional growth and effective use of educational resources. Bridges to the Future, an ASBO program initiated in 2006, is made up of a select group of newer ASBO members. These scholarship recipients are school business officials in the profession for five years or less and who are members of ASBO International. Scholarship monies allow participants to attend the annual convention and leadership conference for the purpose of gaining a network of colleagues, experiencing ASBO professional development, and better understanding the resources available to ASBO members. Table 1 provides organizational demographics for both ASBO International and the Bridges to the Future subset of ASBO.

TABLE 1
ORGANIZATION AND GROUP DEMOGRAPHICS

Organization or Group	Total Number in Organization or Group	Number of Males	Number of Females	Race or Ethnicity
ASBO	5,074	48%	52%	Predominantly White Caucasian
Bridges to the Future Membership	103	44%	56%	Predominantly White Caucasian

Participant Information

SBOs in this study carried a variety of job titles and are largely responsible for all business related matters in their districts. Participants job titles included Business Director, Chief Financial Officer, Chief School Business Official, Business Manager, Director of Finance and Operations, and District Clerk to name a few. Job responsibilities included, but were not limited to, developing and maintaining school budgets, supervising payroll and accounts payable, and oversight of all ancillary services such as transportation, food service, building and grounds, technology, and human resources. One of the participants, Josh, stated what others implied, “You go through your job description and there are so many things that don’t fit into that.” Drake said, “I’m not sure how it varies across the country, but in the absence of the superintendent, the Director of Business Services basically stands in for the superintendent” and he makes any and all decisions that need to be made.

Respondents often made comment about the wide variety of responsibilities allocated to them in their school business roles. Lana, a District Clerk from a small rural school district of 420 students stated

I was hired as the district clerk. That's what they call us in our state, but in a smaller school like mine, Class C, you end up doing everything. You do all the budgeting. You do all of the Board work. You pretty much share everything. I was blessed to be able to get a payroll clerk, so I don't do that.

Chris, a Chief Financial Officer from another very small district said her job included receipting, overseeing payroll, accounts payable, and all of the revenue functions. She is also responsible for preparing the annual budget, the financial statements, coordinating the audit, preparing grant applications. Additionally, she oversees food service functions and all human resource functions. The responsibilities of Lana and Chris, who represent small rural districts, are contrasted with the job responsibilities of Nikki who serves the largest district represented in this study. Nikki, a Chief Financial Officer from an independent school district stated

I manage payroll, accounts payable, financial accounting, budgeting, procurement, and warehouse services. All financial matters as they relate to the school district; bond authorizations, everything; financial policies, intergovernmental, I pretty much manage those.

Mabel, a Director of Business Services in a suburban district stated "pretty much anything that's not curriculum comes across my desk." After stating all of her responsibilities, Lydia said, "It sounds nice and simple and very neat and it is not."

Table 2 provides an overview of the 14 participants interviewed for this study. They represented urban, suburban, and rural public school districts throughout the U.S. Eight

participants were female, 6 were male, 12 were Caucasian, 1 was Hispanic, and 1 was African American. Eight participants worked in districts within the North Central region of the United States, 4 were located in the Pacific Northwest, 1 from the Northeast, and 1 from South Central U.S. Although the researcher looked for maximum diversity in participants, those in the Bridges to the Future program to date have been primarily Caucasian and, more often than not, from the North Central and North Western regions of the United States. No interviewees were available from the Southeast region of the U.S. For reasons unknown to the researcher, there has been no participation in the Bridges to the Future program from school business officials in that region. In order to protect confidentiality, the participant name is a pseudonym. The race of the participant is assumed by the researcher unless the participant provided the information without researcher questioning or prompt. It should also be noted the Association of School Business Officials International (ASBO) organization is made up of primarily Caucasian members.

TABLE 2
INTERVIEW PARTICIPANT INFORMATION

Participant	Job Title	Race/ Gender	District Size/Type	District Region in U.S.	Student Diversity
Lydia	Business Director	White/ Female	4200 K-12/ Farm or “bedroom” Community	Pacific Northwest	primarily white; growing Russian and Hispanic populations; 60% F/R
Katy	Director of Business Services	White/ Female	902 K-12/Suburban “Commuter” Town; “white collar professionals”	North Central	White; 1% African American and 1% Other; 20% F/R

TABLE 2 (continued)

Participant	Job Title	Race/ Gender	District Size/Type	District Region in U.S.	Student Diversity
Nikki	Chief Financial Officer	African American/ Female	85,000+ K-12/Urban	South Central	60% Hispanic; 9% African American; 25% White; 30% ELL; 63% F/R
Chris	Chief Financial Officer	White/ Female	660 K-12/Rural	North Central	30% Native American; high percentage of SPED and poverty
Delbert	Chief School Business Official	White/ Male	3500 K-8; Suburban	North Central	80% ELL – 60 different languages spoken; 50% F/R
Dan	Director of Finance, Budget, & Community Development	White/ Male	13,350 K-12/Urban	North Central	Primarily white; 20% Native American; 35% F/R; “large homeless population”
Josh	Director of Business Services	White/Male	1,934 K-12/Rural	North Central	93% White; 4% Hispanic; 1% African-American; 36% F/R
Nash	Director of Finance & Operations	White/ Male	5000 K-12/Suburban	Pacific Northwest	Primarily white; 9% Hispanic; 40% F/R
Deanne	Business Manager	White/ Female	2300 K-12/Rural	Pacific Northwest	90% White
Drake	Director of Finance & Operations	White/ Male	1360 K-12/Rural	Northeast	Primarily white; 55% F/R
Ellie	Chief Financial Officer	White/ Female	2900 K-12/Larger Rural	North Central	“minority majority” 80% Hispanic; 5% Somali & Sudanese; 80% F/R
Kim	Business Administrator	White/ Male	13,000 K-12/Suburban	Pacific Northwest	“Lot of ELL issues”; 28% Hispanic; “lot of illegal immigrants”; 48% F/R

TABLE 2 (continued)

Participant	Job Title	Race/ Gender	District Size/Type	District Region in U.S.	Student Diversity
Lana	District Clerk	Hispanic/ Female	420 K-12/Rural - Indian Reservation	North Central	80% Native American; "my son is the only Hispanic" 5% F/R
Mable	Director of Business Services	White/ Female	3,000 K-12/"kind of suburban"	North Central	Mostly white. "Staff is the same. Our staff is very white"

When asked to describe the school district in which they worked, participants shared various responses. Delbert, a Chief School Business Official, works in a suburban school district located in a large metropolitan area that serves a “very diverse group of communities.” Kim, a Chief Financial Officer, works in a school district located in one of the top five largest cities in a Pacific Northwest state. “We have about 13,000 children attending; total count including special education. Not a growth district. We’re somewhat limited by our boundaries. We’re a college town.” Another Chief Financial Officer, Nikki, works in one of the largest and most progressive public school districts in the south central U.S. She referred to “racial underpinnings that have existed over time as a result of forced integration.” Josh, a Director of School Business from a rural district, focused on the consolidation of buildings due to declining enrollment in his district. He said, “The district itself is two cities and seven other surrounding townships that feed into the district. Two elementary schools had dropped below 100 students and the previous administration had done studies and noted that it just wasn’t financially efficient.” Drake represents a rural district in Southwest New York State. Katy is the Director of Business Services in a suburban, “commuter” town made up of “doctors and other professionals.” Two school business officials, Chris and Lana, work in districts closely connected to large Native American student populations.

Participants worked in a variety of school settings with vast differences in student populations. Student populations in interviewee’s districts ranged from a low of 420 students to a high of approximately 85,000 students. Three participants, Katy, Chris, and Lana, worked in districts with fewer than a thousand students. Eight participants work in districts serving between 1,000 and 10,000 students. They are Lydia, Delbert, Josh, Nash, Deanne, Drake, Ellie, and Mabel. Two participants, Dan and Kim, worked in districts with a student population between 10,000 and 50,000 students, and Nikki works in the largest district serving a student population of over 85,000. Figure 1 provides information about participants and the number of students served in the school district where each interviewee worked.

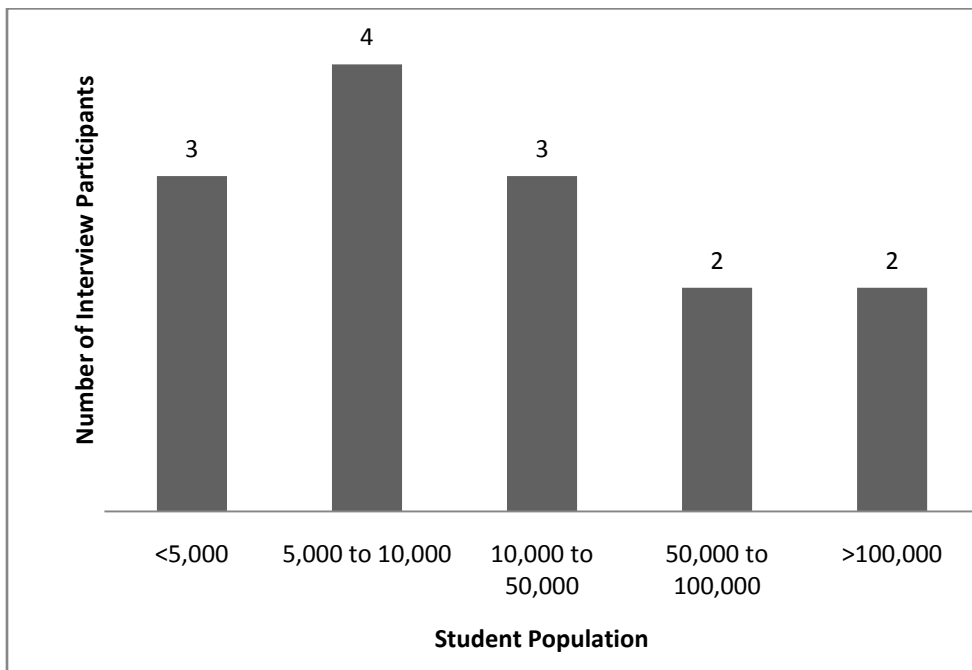


Figure 1: Student population

The size of community or city in which the school districts were located also varied. Participants worked in school districts located in communities ranging from a total population of under 1,000 to over 700,000. Three interviewees worked in school districts located in communities with populations under 1,000 people. Four participants worked in school districts

located in communities with populations between 5,000 and 10,000 people. Two school business officials served in districts located in communities with populations between 50,000 and 100,000 and two participants worked in districts located in cities with well over 100,000 people. Figure 2 provides information about participants and the population of the community or city where the school district is located.

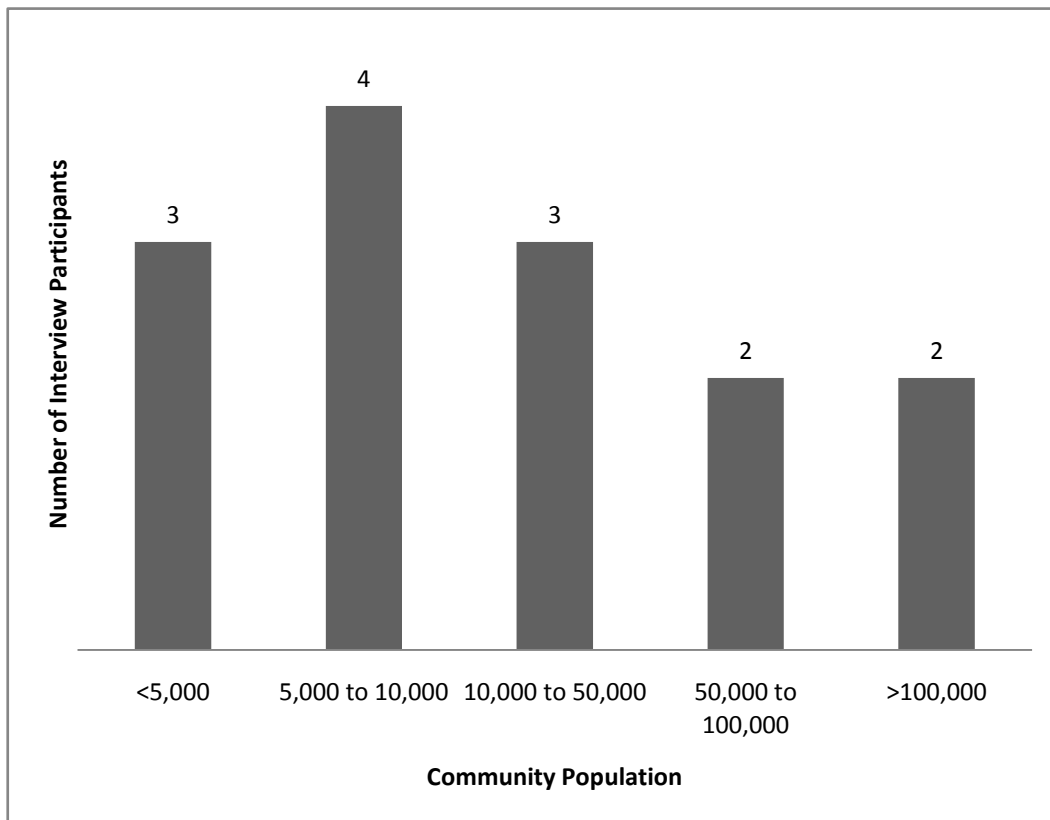


Figure 2: Community population

District Diversity

Participants represented districts with a great deal of diversity, as well as districts with little to no diversity in student or staff populations. Delbert said he worked in a district with a great deal of diversity, stating his district had “quite a large ethnic and cultural diversity.” He stated, “We have approximately 80% of our students speaking a language other than English at home. We have somewhere around 60 different languages spoken by our students in the district.”

Chris said that due to a high number of Native American students, “we have a high percentage of high needs students.” Lana, a district clerk, referenced a 25-30% Native American population in her district, stating, “so we deal with a lot of kids coming from the Indian reservations.”

Several SBOs said they had an increasing population of ELL students; “it has grown quite a bit over the past few years.” Kim, a white male business administrator working in a Pacific Northwest district, stated, “You know, a lot of times they [Hispanics] will come with a third grade education as a junior or something; a lot further behind, so we have a lot of those issues.” He said his largest minority population was about 28% Hispanic, “a lot of illegal immigrants” because “this area encourages them and treats them well so they tend to migrate here. As such we have a lot of ESL issues.” He thought the large number of illegal immigrants might be due to missionaries “converting them and they might come here.” He went on to say, “We have the second highest federal funds rate in our state because of that; because of the disadvantaged.” Ellie stated, “Our student population is majority-minority; about 80% minority students.” She said the district’s Hispanic students come from Mexico and Guatemala, and then “we also have in recent years an influx of Somali and Sudanese populations.” A beef packing plant draws this diverse population to the community and school district.

Students of poverty, another group often marginalized in mainstream public education, were generally referenced in terms of the number of students qualifying for free and reduced lunch by federal income guidelines. Student populations in interviewees’ districts qualifying for free and reduced lunch services ranged from a low of 20% in one district to a high of 80% in another. In all but one district, the percentage of students qualifying for free and reduced lunch has increased. Dan, a white male Director of Finance, Budget, and Community Development said

We have about 35% free and reduced lunch population district-wide and that's growing. I think the economy has caused families that prior to this have actually qualified for free and reduced lunch but didn't fill out the form now figure, "I'd better fill out the form."

Lydia, a white female business director in the Pacific Northwest stated, "We are high poverty. We're over 60% poverty level. All of our schools qualify for Title I funding except our middle school and high school." Nash stated, "Our poverty level based on our free and reduced is about 40% and when I started in this district in '07, it was 32 to 33%. It's gone up quite a bit in the last four years."

Other SBOs spoke of other issues of diversity including homeless populations, high student mobility, and large numbers of Native American students and the challenges they bring to the district. Dan stated, "We have a large homeless population. Our homeless coordinator is constantly out. We receive some pretty good money, McKinney-Vinto money, for our homeless." Lydia discussed the issue of high student mobility. She said because the district was "a cheaper bedroom community," a couple of the schools could "expect a 70% turnover within a year." She said the district is surrounded by "really low housing and apartments and they just come in and out and we'll have all these families just bouncing back and forth" between her district and surrounding districts. Several SBOs referenced the challenges of having a large number of Native American students in their districts. Chris stated, "So we deal with a lot of kids coming from the Indian Reservations, and we have a high percentage of high needs students." Lana said her district was located directly on an Indian Reservation. Referring to the Native American community, she stated, "Getting the community involved in their kids' education is a difficult thing. It's one of my superintendent's biggest problems." She went on to say, "I'm not

sure why the academic is not being pushed in that setting. And I can't say it's not in all families. In the majority I would say that it is, and I don't understand why."

A couple of participants considered their districts to be "very white." Mabel stated, "We are not a very diverse community. The majority of our population is white with almost the same ethnic background. Our staff is the same. Our staff is very white." Deanne said

Our state is still primarily a Caucasian state; I guess is the best way to put that.

We are starting to see an African-American population and a few Asian

Americans in the area, but still overwhelmingly Caucasian and not substantial

enough. As a matter of fact, in most of those categories we struggle meeting the minimum quotient to enter them in the AYP data.

Only one SBO indicated she was working in a wealthy district. Katy said, "We have a lake in town too, so we have a lot of properties that are owned by people that live in [State] that come up just for the summers." She described the population of the community as a lot of university professors with "our share of doctors," and "mostly professionals."

Why SBO?

Participants interviewed came from backgrounds representing both the private sector and education and stated various motivations for becoming school business officials. Important to the findings of this study is the fact that only two of the 14 participants moved into the business office from an education background. The other 12 became school business officials after working in and being influenced by the private business and finance sector. Katy and Drake were educators. They had trained and worked as teachers before they moved into administrative positions in their districts. Katy stated, "I was a teacher, a business ed teacher at the high school level. My mentor teacher encouraged me to get my masters in something other than teaching,

because, you know, just to diversify.” Drake was a science teacher at both the middle and high school for six years and then the assistant principal of the high school for two years. He said, “I was moving from an assistant principal to a district office position so it was a promotion and I wanted to do that...had an interest in doing it.” Mabel and Lydia indicated they wanted to become teachers or were strongly encouraged to become teachers when they went to college, but chose a different path and ended up in the private business sector. Mabel stated

I’ve always been interested in education, but I started out wanting to be a CPA.

My senior year in college I realized I really wanted to be a teacher, but I figured it was too late so I stayed in the business field.

Three SBOs were tightly connected to their public school districts even though they did not have undergraduate degrees in education or prior professional experience as educators. Lydia served the local public school system for twenty-three years by volunteering or working in jobs associated with the school system before becoming an employee of the district. This business director first volunteered in the schools when her oldest son, diagnosed with Down’s syndrome, started going to pre-school. Although not employed by the school district, she also worked in areas of grant management and healthcare access for students who were under-insured or uninsured. She had oversight of a grant providing an after-school mentoring – tutoring program for high school students, and also volunteered on the district’s community budget committee for eleven years. After working in various jobs and volunteering in the school district, she decided to finish the college degree she started before her first child was born. She said, “The current superintendent strongly encouraged me to go into teaching just because I’m kind of a people person.” However, she chose a different path, stating, “I think I’m going to major in business. I’d have more sellable skills!”

Dan, a Director of Finance, Budget, and Community Development served a three-year term on the local school board and resigned from the board when he was offered the school business position. “The business manager had been here 35 years, retired.” The administration “didn’t like any of the candidates they had interviewed.” He said he was going to leave the school board because he had too many obligations with the bank where he was employed. He was asked to apply for the position and even though he had been in banking for 20 years “was silly enough to do it, I guess. Imagine that, I got the job and have been doing this five years.” Nash, the Director of Finance and Operations in his school system, had previously been the food service supervisor. He had a degree in business management and thought he would have a career in food service, but when the Executive Director of Business Services retired, he was offered the position. He said, “My superintendent asked me if it was a challenge I was willing to try and naively I said yes.”

Twelve SBOs interviewed came to the school business position from the private sector, having attained college degrees and or work experience in fields other than education. Mabel and Ellie were certified public accountants. Dan, Kim, and Josh had undergraduate degrees in finance. Lana had training as a legal assistant, but had been a stay-at-home mom for twenty-eight years prior to taking the district’s Clerk of the Board/Business position. She said, “It was just a fluke.” She asked her husband if she should apply and he told her the job was “way over her head.” Lana said she looked at her husband and said, “Well, now of course I’m going to apply.” Deanne took the school business manager position after retiring from a previous job stating, “I had retired from my previous job and then took a couple of years off. When they were doing a search, the superintendent approached me about applying for the job. It fell in my lap.” Coming from the private sector, Delbert was in search of a more fulfilling career. He stated

While I helped make some people some money and helped improve working conditions for people, and so forth, I really didn't feel like I was making that big of a difference in people's lives, in contributing to society. I wanted to switch to something that I thought would really make a difference and where I really believed in the product that being produced. That led me to education.

Josh, finishing his undergraduate degree in finance, said he went on a golf outing with the Dean of the Business School and she suggested school finance kind of comingled two of his primary interests, politics and math, and that he might enjoy it. Because of that conversation, he went back to the graduate program, "finished the Masters and got an administrator's license and now I'm just finishing my fourth year as a business official."

The SBOs Most Important Role

Participants in this study were asked what they considered to be the primary or most important role of the school business leader. Responses varied, but generally addressed one of three areas including providing financial and operational leadership, effective communication of budget issues, and running the business side of schooling as efficiently and effectively as possible. Delbert stated, "I think to provide financial and operational leadership for the district is the most important role." Addressing financial leadership, Delbert said, "It's in providing leadership and direction at the same time," and "how we go about providing the right resources at the right time" to meet our vision and educational goals. Delbert also expressed how critical it was to provide operational leadership to ensure ancillary services are doing what they are suppose to do in the best way possible "in supporting the educational process." Katy stated her most important role is "to align financial resources with our school's vision." She believes it is

especially critical to look at the budget and make sure the resources meet the goals identified in the strategic plan. Mary said she believes her role “is to develop and manage the budget.”

Communicating the budget and supplying good information to other administrators and the board was a common role participants expressed as most important. Lydia said she saw her role as trying to be an educator, helping administration and the Board of Education understand the current financial situation and the long-term impact “and how those decisions are going to be made.” Lana, a District Clerk working on a reservation, believes she “stays on top of the current budget issues and watches legislative turns.” She believes this is most important because “it gives me the best information to inform my board about what’s going on.” Chris said it was important to “know our financial information” and her “number one role is giving them [superintendent and other administrators] good information.” Ellie expressed the importance of communicating the budget “in a way that administrators, board, and community can understand.” Josh also agreed his most important role was “to be an effective communicator.” He addressed the importance of effective communication especially important during tough economic times. Ultimately, he understood his role was to “make some tough decisions.” Nash also communicated the importance of “being confident in the information that you share with the board and to constituents and to administration about what’s really going to happen” with the budget and impending budget reductions.

Kim said his role was often discussed very openly in cabinet meetings with the schools’ superintendent. “My job, of course, is to do our best to run most efficiently and effectively our support programs so we are able to direct funds to support academic achievement.” Drake agreed, stating, “running an efficient program in order to be able to provide those [educational] services.”

Technical and Managerial

Thinking about their role in school business, participants were asked to respond to the notion that leaders in education, with technical and managerial skills alone, would fail to meet the realities of contemporary challenges in education, as suggested by Marshall & Oliva (2006). The researcher found six respondents who agreed with the statement and five respondents who disagreed. Two interviewees had mixed feelings about it, and one refused to make a response about the quote.

Those respondents who agreed often connected their responses general leadership practices rather than to issues of student achievement and equity. Drake agreed with the quote and said

I think in the past or, you know, there might be a kind of preconception that the business function is more technical in nature and never really do the missions of the business office and instruction really meet. I think that's a mistake. I think the business office can be intimately involved in a mission to improve instruction and increase awareness in the community and those kinds of things.

However, Drake also reminded, "The technical piece is very important," and "You have to have the knowledge base of course to get the technical nuts and bolts sort of issues done." He said he agreed with the statement because much of his work "has to do more with people skills that are so difficult to nail down as a skill set." Nash agreed technical and managerial skills were essential to the work of the SBO. "They're two great skills to have as a school business official," but he went on to say he did not think technical and managerial skills alone would be enough. "You've got to have some understanding of how they [educators] run things before you really

look at their budget and say what they're spending their money on, or what they really need and why they need it." Josh stated

If you look back at the profession as it has evolved, the business manager has grown from more than the numbers crew or bookkeeping-ledger-accountant type role to also one of an instructional leader and at least in the districts I've been a part of one of the key people, if not the key person, in terms of public relations.

Two respondents who agreed with the quote connected their responses to student achievement.

Mabel said, "There's more to being a business manager than just being able to balance the books." She felt success was measured "more by your student achievement and what you're being able to do for kids." Chris agreed, stating, "You have to have a heart for education because we're serving kids." She also related her response to districts, like her own, that served more diverse populations by stating

In a district such as ours, where we've got such a diverse group of kids, a lot of kids with special needs that you have to think about how you can apply and reach those kids so I mean just to have managerial skills or technical skills, you're not going to be able to think outside the box.

Katy also suggested SBOs "can also have a heart and probably relate better to the purpose of education," although "there are people that probably wouldn't be able." Nikki said, "Some of that is partially true. You certainly can't come in and apply sort of a mathematical approach to dealing with the complexities of large, urban school systems." She learned very quickly she could not "come in with a very sort of disciplined or business oriented approach as that might not be the best fit or best approach in dealing with school district issues."

Other SBOs were more reluctant to agree with or consider a less technical or managerial role. In fact, Dan took personal offense to the quote, suggesting

The speaker's intent is really talking about people like me who have transferred out of the private sector and don't have knowledge and background in education; that they are left ineffective or ill-prepared for challenges in education today.

Dan felt strongly that the SBOs "with technical expertise have a real practical approach to education." He believes this is especially important due to the "paradigm shifts that are happening in education right now." He elaborated,

School business officials are one of the few people in the entire district that have had any kind of experience outside the classroom dealing with vendors, dealing with payments, dealing with real-life situations that exist outside the bubble of education so to speak. So to help people understand the practical application, I don't know how they could not be part, and an integral part frankly, of any educational team.

The business leader, according to Dan, is in a most unique position "where you can advise the superintendent and advise the Board of Education about how things lay, in a pretty objective manner."

Delbert felt it was not important or advantageous for the SBO to come from an education background either and said many of his peers who had similar backgrounds had been very successful in their roles as school business officials. He conveyed that being an educator was not a critical factor, but believed it was more important to be a "life-long learner, who comes to understand and appreciate the other elements that are involved in educating students in a public education setting and who have a team that works together to address the contemporary

challenges in education.” Even though Deanne said she had mixed feeling about how to respond to the quote, she did say thought “somebody in my role needs to have some kind of a business head and some background in how to run a business.”

Most Important Issues

Without exception, every business official saw the current economy, school finance, and impending budget reductions as the most important issues they were dealing with. When asked what she considered to be the most important issue her district was dealing with this year, Ellie stated, “Let’s just take a wild guess. How about revenue.” Deanne, like many others, agreed, “Well, like most states across the U.S. right now, there’s a big fat revenue shortfall. There’s a big deficit.” She conveyed real concern. “Definitely funding. Money. You know on all different levels. Funding from the state is declining at a scary rate.” Mabel addressed her concerns with school funding as well. She said, “Our state has some pretty big fiscal difficulties, so I think the biggest issue that we are going to be experiencing is funding. Right now, everything is how much money are you going to get from the state.” She said their district had put together a community task force to discuss and address budget reductions and just had their first meeting. “We had our first task force meeting and you could hear the challenges of the economy and the state funding. What’s the state going to do? It kind of colors everything with where we should go in the future.” Nikki said, “You know you’re looking at cutting a hundred million dollars out of your budget all in one year. That’s a substantial issue for us.”

Some gave specific examples of the amount of reductions required. Deanne said, “This year for our school that meant \$1.2 million dollars out of a \$22 million dollar budget. It hurts. There’s so much that you can do and then you have to start slashing and dashing and that’s not fun.” Ellie said, “We expect to lose between one and a half to 2 million in state aid. State aid

makes up 65% of our total revenue, so any loss would be significant to us because property values are very low.” Dan stated, “Over the five years I have been here, we’ve cut about \$6 million out of an eighty-million dollar general fund budget. He said their newly elected governor has proposed a 10% across the board cut to include the K-12 funding formula “which basically backs us up about five years, \$7 million dollars, in our core general fund.” Lydia said, “Right now I have \$1.7 million dollars of stimulus dollars that won’t be there next year. That’s almost twenty-eight FTE [full-time equivalent], so body-wise that’s about 35 to 40 people. You know how do you rebound?” Nikki, the Chief Financial Officer from a larger urban setting said

Our state is projecting a twenty-eight billion dollar shortfall; a deficit. It’s proposing to cut public education about ten billion dollars. For us that could mean anywhere from cuts ranging from \$94 million dollars to a gap of \$181 million dollars. And so, how do you make those kinds of cuts?

SBOs play a significant role in recommending areas to be reduced or cut from the budget and often believe they are in the best position to make those recommendations and decisions to those on the academic or educational side of schools. Kim, a Business Administrator from the Pacific Northwest said, “On the business side, the administrative side, I was probably the principal one recommending cuts because that’s our area of expertise.” He also indicated the business office role of educating the top administrative group, the cabinet, about budget problems. “Here’s the funding cut. Here’s our shortfall. Here’s what we have. Here’s what we need to cut.” He firmly believes, “Educators forte is not management and those types of things, whereas business people, that’s what they’re trained in. So we’re constantly looking at more efficient, more effective ways to keep what’s going on in the classroom the high priority items.”

Nikki, the respondent from the largest district shared, “Anytime we want to look at resource realignment, certainly I’m integral in those conversations. There are not any major decisions that are made without my counsel and/or approval.” Dan commented, “I’m not up to my ears in academic programming, so I can pretty objectively look at that and say, „Gee, are we getting our bang for the buck out of this or not?” and “I think we have the ability to be objective or more objective in all of these decisions,” and “I think we’re in a position to give them [administration] some pretty objective data-driven information to make those decision with.” Nash also conveyed the importance of the school business administrator in the public school setting by stating, “I would say that as a school business official our fingers, if you will, kind of reach into a lot of different areas, especially in building the budget and guiding the path in building the budget.” Delbert agreed, stating, “Much like in the private sector, the business manager serves as a critical piece of the management team in developing strategies and approaches to achieve the organizational goals.

Several SBOs connected the loss of funding to the impact it had on students and their academic achievement. Nikki said the “most pressing issue, outside of closing the educational gap for our minority students, is obviously our budget issue. Unfortunately there are revenue constraints. You know the fiscal realities a lot of times hold us back from doing that.” Katy, the Director of Business Services in her district, stated, “Trying to serve multiple, or a vast range of educational opportunities for our kids with our limited resources” was her biggest concern. Nash agreed, stating

I would say the biggest issue that we’re dealing with is the mentality of doing more with less and how that’s really working. So for example, we’re talking about

the ability of our leaders to lead while they have diminishing supports and how that impacts the education of the students.

Several SBOs recognized the biggest issue beyond school finance was student achievement and/or closing the achievement gap. They were able to articulate important professional practices to support student achievement. Deanne stated, “From an education side, we’re continuing to focus on ensuring that all students are able to achieve at their individual potential.” Delbert spotlighted the importance of a well-trained professional staff by stating

Ensuring that we’ve got the right staff with the right skills, focused on a delivery of instruction for students in a way that allows them to learn the best. That is, I think, generally the largest challenge for education and is certainly true here as well.

Nikki, the Chief Financial Officer for the largest district involved in this research project, said, “I think the most important thing obviously is that all kids are high achieving, and that would mean closing the achievement gap and making all kids, getting them highly functional and giving them a high quality educational environment.” Lydia, however, focused more on how the loss of funding would impact adults and staff in the system when she said, “And now we have people accustomed to serving kids at a certain level” and fewer funds means not be able to provide students the current level of service.

SBO Knowledge of Student Achievement

Most respondents indicated some, if not all, schools in their districts were not making adequate yearly progress. Lana stated, “We’re in AYP jail and trying to get out.” Josh said, “In the past four years, we’ve been in the bottom half or even bottom quarter of our comparables in terms of our achievement.” Six SBOs referenced data indicating an achievement gap with

minority and/or disadvantaged students. Nikki stated, “We do have a gap with our African American and Latino population, our ELL population. We do have a gap in terms of achieving AYP, as well as state standards.” Deanne stated, “The reason that we [did not make AYP] is because of our sub-categories. It’s our sub-groups that are having problems.” Lydia and Drake identified a high percentage of special education students as “the reason the high school was not making AYP” and “special education was one area that was a weakness in our scoring.” Chris said

I can say we’re on school improvement because we have a very diverse group of students here. It’s in our poverty groups and our Native American groups of children, so those are the children we really need to work harder at focusing on and reaching those kids.

Ellie, from a particularly diverse and high poverty school district, referenced a graduation rate of 62%.

Several SBOs said their school district’s achievement levels were improving. Deanne said, “Achievement levels though, over the last ten years, have consistently grown and especially given the mobility we have, which is above the average for the state.” Nikki, the SBO of a large urban district with a significant ELL population said, “Our achievement data is very progressive. It’s getting better over time.” Five SBOs stated they were making AYP and “doing really good.” Kim, however, seemed reluctant to celebrate his districts’ achievement when he said, “Achievement data, since I made the jump to public education, I’ve never been to a board meeting in any public school district where they didn’t say we’re ahead of the state average, so I don’t know who’s below it.” He did admit, “The curriculum people and people involved in that, rightfully so, are quite proud of that given that we are one of the highest [achieving] minority and

disadvantaged populations in the state.” Three SBOs were not able to articulate what the achievement data portrayed about the students at the school. Nash and Drake stated they did not know right off hand or “off the top of my head,” and would have to look it up. Lana, the district clerk, stated, “Achievement data, what do you mean?” This may indicate a disconnect exists between the work of school business officials and the educational or instructional focus of public education.

SBO Connection to Student Achievement

Although most SBOs were aware of their district’s student achievement progress and gaps, ten of the interviewees found it difficult to articulate how their roles as school business leaders were connected to student achievement. This may not be surprising given the number of interviewees who were established in the private business sector. When specifically asked how the role of school business connects to student achievement, Mabel indicated “it’s quite a ways removed from the kids,” and Chris said, “I believe it’s harder to document that.” Mabel, a Director of Business Services said, “It can be hard because just to think what I’m doing helps kids because I can go almost a whole day without seeing kids.” Delbert, a Chief School Business Official stated, “I think it’s important to distinguish between them [instruction and finance] although some might argue, that fundamentally, they’re related.” Dan said, “We’ve struggled with that in this office, trying to...I don’t think there’s a direct line.” This Director of Finance, Budget, and Community Development went on to say, “I don’t think we have the same relationship as a classroom teacher does, as a building principal might, even as a staff development officer or an assistant superintendent of student achievement.” Deanne believes “student achievement can be a result of the student, the teacher, and the parent” but did not see herself directly connected to students and achievement. Lydia also felt this same disconnect,

stating, “I’d say that’s still a work in progress for me. I’m still trying to learn that one.” Chris, the Chief Financial Officer in her district confirmed this. “I think that’s always a really tough one, I think, in our position to actually see that correlation between student achievement and what we’re trying to accomplish.”

A few SBOs realized there was a connection between their work and student achievement. Most respondents who made this connection suggested it came from “making teachers and administrators’ jobs easier, making it easier on them to promote student achievement.” Drake, a Director of Finance and Operations stated, “The biggest way is hopefully the resources and being able to provide the resources and programs that increase achievement and support our teachers in learning, teaching and learning.” Some were more passionate about their responsibility for student achievement. Nikki shared, “I think the business office can be intimately involved in a mission to improve instruction and increase awareness of the community and those kinds of things” and passionately stated

Everything that we do is centered around supporting the goals of student achievement; being able to work through the various ways to allocate resources.

Looking at how they’re allocated, how they resonate in local school campuses, how the resources are used. How do those resources actually turn into support for student achievement?

A couple of SBOs found their connection to student achievement in terms of providing more efficient ancillary services so more dollars could be directed to the classroom. Kim said, “My job is to do our best to run most efficiently and effectively our support programs so that we can direct funds, the maximum amount of funds to what are considered the key programs to support academic achievement.” Mabel, the Director of Business Services for her district, supported this

view by saying, “If you have poor business managers and money is wasted that you can never get back, that’s very much a disadvantage to students.” She felt strongly about money spent for ancillary services program so kids could have good breakfasts and good lunches because “all of that sort of thing does tie into student achievement.”

Only two SBOs made a direct connection to issues of equity and took some responsibility to ensure all students had the resources to get the same level of education. Dan, affiliated with a very diverse school system, stated, “One of my major roles is to make sure all students have the same floor. We don’t starve one school or one program. They’re all given the same floor, the resources to get the same level of education.”

Collaboration

Every respondent indicated they were part of a collaborative administrative team and believed they were influential in setting policy and in decision making processes that included programs and curriculum. In all cases, SBOs considered themselves valuable members of the administrative team or cabinet in not only providing sound financial information but also in providing input from a perspective other than those with a background in education.

The connection between staff, programming and the budget was apparent, and every school business official indicated they were expected to participate in discussions about program development “because it does tie into the financial budget” as Nikki put it. When discussing administrative decisions impacting policies and programs, Delbert stated, “The superintendent, the other administrators, as well as the Board of Education, look to me to provide the leadership and recommendations from the business perspective.” However, he indicated while he was able to bring to the table a business, operational, and private sector perspective, he also understood

the right solution from the business or private sector side was not necessarily appropriate for the education or public sector side.

Like Delbert, other SBOs recognized their limitations when collaborating about academic or educational policies and programs. Kim noted the other administrators on the cabinet would like for him to be more involved, but he believes his expertise is in finance and that he “knows enough to know not to meddle in things I’m not trained in.” He sees his job as more of being told what works and trying to support it with finances. He stated

I just tell them, “Look, classroom and pedagogies I have not been trained in.

That’s your expertise. You need to tell me what you think is the most effective way to do that.” I tell them [educators], “If you guys agree among yourselves that is clearly the most effective way, then my job is to try to provide the funds to do that, not to argue with you about whether I agree we should be doing that or not.

I’m just not qualified to do that.”

Others recognized the importance of understanding the business or fiscal perspective as well as the curricular and student achievement perspective. Josh, the Director of Business Services in his district said he believed it was important “that in order to create a good process for going about how you communicate and advocate to your community for the resources you need to do what you’re doing.” He felt it was very important to “be involved in the establishment of the curriculum and your academic goals or your benchmarks.” Ellie, a Chief Financial Officer in a majority-minority school district, confirmed the importance of being involved in analyzing the data the state is using for assessment. At a most recent cabinet meeting, the administrative team “analyzed the data and looked at our assessment systems we use in house and how those correlate with results on the state testing.”

Best Practices

Each of the school business officials interviewed was asked what they considered, from their own perspective, to be best practices in the business office given the current economic and political climate. The question was asked to see if they connected resource allocation and business office decisions to practices which best support student achievement and issues of equity even in times of budget reductions. Respondents' answers focused on greater collaboration in decision making, creative and innovative thinking in budgetary decisions, increased monitoring of the budget and other business office practices, and developing greater skills in communicating the budget and fiscal issues to the greater public.

SBOs interviewed recognized that reductions and resource allocations could no longer be done in isolation. Dan stated, "It's important that best practices not happen in a vacuum; that leadership in the business office not happen in a vacuum. It has to be part of a collaborative leadership with other district administrators." Mabel also believes this is important. She said, "Most important is being able to work with the rest of the administrative team to reach those goals for the district." Another SBO stated, "I think that those who are ultimately successful or at least the most successful, are ones who have a team that works together to address the contemporary challenges in education." Josh recognized the importance of getting "feedback and you might recognize from the feedback that it's really not a very good idea" when making budget decisions.

Participants provided a variety of responses when prompted to be more specific about how they were addressing budget reductions in these challenging economic times. When addressing resource allocation, Chris stated, "these days with the economic landscape, systems need to get more creative and innovative as to how they utilize their resources and also bring in

resources.” Nash indicated, “We’re going to hit our non-classroom related things first.” Another felt it was important to be consistent, stating, “I think sometimes there isn’t a right or wrong answer as long as you’re consistent with how you’re applying your process.” Several SBOs said it was important to review every component of the budget and ask, “Is there a better way of doing it?” Mabel suggested that the school business official should “review what you’ve been doing and not just keep allocating funds to a program or a particular service just because you have always been doing it.”

Eight of the SBOs interviewed believed communication was essential when thinking about best practices in the business office. Several indicated the importance of communicating with the Board of Education, the administrative team, faculty and staff, and the larger community. Kim stated

We’ve done a good job of educating them and bringing them along. Not trying to manipulate them, but showing them the data, doing long-term forecasts, and showing them the consequences of taking the easy way out now versus what’s that going to mean next year and the year after that, and a year after that, and five years down the road.

Deanne shared she thought they could be better at being “proactive in educating patrons, teachers, and all staff members about school finances and what it means and that we need to do something differently than what we have done because we have always had money and now we don’t.” Not only is communication important, but several SBOs believe it is very important to break the budget information down to meaningful and understandable parts. Deanne said, “You need to really isolate what information is important and in a concise manner and then try to present that to your other administrators, your school board, and your community.” Josh stated,

“Most of us [business managers] are going to know what we’re talking about, but to the average person that really hasn’t spent five minutes in school finance life, it’s not going to mean a whole lot.” Essentially, SBOs believe appropriate communication leads to trust, which “becomes important cause people sometimes aren’t going to like what you have to say, but if you’re direct and honest with them, I think they will respect you for it.” Mabel was able to connect the importance of communication and knowing the audience you are addressing to current education jargon, “When people talk about differentiated instruction, we joke around about it because I try to differentiate my finance presentations.”

Several SBOs addressed the importance of short and long-term financial planning and increased budget monitoring to get through more difficult economic years. While addressing the use of a long-term plan to guide decisions, Kim said, “If we stick to that course, we’ll be poised to rebound and be on the leading edge of services, and in terms of what we are able to do for our employees.” Monitoring and applying appropriate internal controls was addressed by several SBOs. Chris stated, “Best practice, I mean I guess a best practice would be staying on top of your budget, constant monitoring of your budget.” She conveyed, “I think I’m in my budget every single day, so strict adherence to budgeting.” Dan addressed the necessity of monitoring all aspects of the budget. “I believe it includes regular review of operations, ancillary activities, to ensure that resources are used appropriately.” Nikki stated it was necessary to “follow the dollar, seeing how the dollars are spent.” Dan stated, “Don’t spend what you don’t have. I think for us and as a nation you live within your means.”

Only two SBOs connected resource allocation and reduced resources to students and achievement. Mabel, the Director of Business Services in her district, stated, “It’s not all about

just increasing or maintaining your fund balance or negotiating the lowest possible settlement with your teachers.” Drake, the Director of Finance and Operations said

You know when we talk about cuts and doing those kinds of things, a lot of times professional development and those sorts of issues are the first to go and I just try to keep people thinking that’s what we do here. We’ve got to improve programs and move forward and you can’t cut those areas because they’re viewed as less important than others.

Two SBOs said they did not know what best practices were in the current context of school finance. Lana admitted, “You know, I haven’t really heard of specifics” and apologetically said, “I don’t know. I don’t know how to answer that one. Sorry.”

Social Justice and Equity

Eight participants were provided introductory information about the concept of bridge leadership. The researcher prompted further investigation of bridge leadership to only those participants he perceived had used language, at some time during the interview, indicating potential understanding of issues of social justice and equity as they pertain to work in the business office. The researcher sensed, in some cases, reluctance on the part of some participants to discuss academic achievement, inequities, or issues of social injustices. During interviews, Bridge leadership was defined as a “leader known for focusing on the achievement gap, increasing the quality of schools for all students, and providing necessary resources.” The researcher explicitly connected this concept to the work of school business leaders by suggesting that mobilizing and generating resources could strengthen initiatives that contribute to achieving social justice and equitable educational practices. When asked if they considered their role in school business to be an educational leader who worked as a bridge leader as introduced or

defined, participant responses varied but they did not see or understand bridge leadership as having anything to do with social justice and equity. They seem to be defining bridge leadership as bridging between business and education or as a general form of collaboration across different roles.

Five participants responded in a way that indicated they agreed with the conception of bridge leadership and felt they served as bridge leaders. However, those who perceived working as a bridge leader often showed a clear misunderstanding of this concept. Drake stated he agreed with the concept of bridge leadership. He said his role was “to support that educational mission and we need to be familiar with it.” He added, “In being familiar with it, your expectation is to lead so that we can make some movement in those areas.” Chris said she thought she was a bridge leader “to a certain extent.” She believed because she applied for and worked with funding targeted towards her district’s Native American student population, and because she attended training “for those types of funding” that she worked in an educational leadership role as a bridge leader. Nikki stated, “Absolutely. I think the business side is very well positioned to fall into that role naturally as we sort of bring in both sides [academic and business] together. Nikki felt the reason the business side was better positioned to influence social justice and issues of equity were because her academic colleagues had “a very narrow focus on just the programming and the educational aspects.” Referencing educators, she stated, “They’re not very well versed. They don’t have the business acumen or the financial acumen to really understand the full scope of the matter.” These SBOs clearly misunderstood bridge leadership and the efforts of bridge leaders to effect policies, practices, student achievement and equity in their daily work. Supporting a school district’s educational mission is not bridge leadership if the mission of the district allows inequities and injustices to continue. Likewise, bringing business and academic

sides together is not necessarily relevant to the work of a bridge leader except for the purpose of challenging and eliminating power relationships and social structures within the school setting. These comments reflect just the opposite when SBOs project a deficit view of students and are dismissive of educators in general.

Dan believed public schools and especially SBOs should not be concerned with issues of equity and social justice at all as “life experiences and much research shows that students have different intellectual capacity and abilities to learn and achieve,” and that it’s not reasonable to believe “two students will always have the same level of achievement and it’s just a matter of the right resources at the right time.” Dan said he would describe bridge leadership a little bit differently. He used an analogy of “silos in that you can’t afford to be caught in your own silo anymore.” He describe what he believed was a better process where people from different departments within the organization work more collaboratively to assist “so our schools educate everybody and give everybody the opportunity to be the best they can be.” Lydia stated, “My goal is [to work as a bridge leader], but I would say I’m not currently operating in that role.” The reason she believed she was not able to currently work as a bridge leader was “because of new management, different management, and building the trust to be allowed to do that.”

Two interviewees did not support the idea that school business officials could or even should work as a bridge leader. Deanne said, “I think it’s a lovely idea but that’s not our culture.” Like Dan, she also referenced “silos.” When pressed to expand on this statement, she said, “I don’t know what it’s like in other districts. In our district, it’s like each school is its own silo and each school pretty much manages their own school, including budgets.” In using the term “silo,” these SBOs were referring to working in isolation, a long-standing tradition in public education (Levenson, 2010).

Delbert said the thought the concept of bridge leadership was “along the lines of freedom, and liberty, motherhood, and apple pie.” He said no educator would disagree with the concept of bridge leadership, but rather some in education would disagree that “the goal of public education is social justice.” He stated that his goal was not about social justice, “his goal was on educating students.” When thinking about his district and the other districts he is most familiar with in his area, he stated

Social justice doesn't come into play as the drive. We're here. We exist as a public entity to achieve social justice. That's not it. It may be that proponents of social justice find that those several items that you've listed are consistent with the goals of public education, and from those perspectives, the agendas or goals align. I wouldn't disagree with that, and as a result, public education may be a tool to help achieve social justice, but I don't know that the purpose of public education is to achieve social justice.

Kim, a white male Business Administrator located in the Pacific Northwest, considered his role as one to maximize and prioritize resources toward Board of Education educational priorities. When asked what specific practices reflect understanding social justice and bridge leadership qualities, Kim said,

Assuring that there is a basic floor or equity for educational opportunities for all students in the district. Assuring that federal funds for disadvantaged students are spend according to the restrictions, and in a manner that maximizes the learning for disadvantaged classes of student.

Although Kim's response does connect to the idea of equity in opportunity, he quickly ties the meaning back to the more technical necessities of managing federal funds.

CHAPTER 5

CONCLUSIONS AND IMPLICATIONS

This chapter represents the conclusions and implications from interviewing fourteen school business officials about their perceptions of how they work most effectively with school leadership teams to leverage district funds that best support student achievement and equitable educational practices, while minimizing the detrimental effects of nationwide budget cuts. School business officials play a key role in funding decisions and resource allocation. They are considered an important part of the district administrative team, and are responsible for many facets within the school business office. Likewise, they have the capacity to better serve historically marginalized students by understanding the issues of injustice and inequity so closely tied to school finance and resource allocation.

Conclusions

The researcher interviewed fourteen respondents, all ASBO Bridges to the Future scholarship recipients, representing school business leaders newer to the field of public education and membership in the larger International Association of School Business Officials. They were, with the exception of two participants, Caucasian men and women. This mirrors the larger organization as the majority of members in this association are, with few exceptions, white persons. Even though this representativeness wasn't the goal of the sample, the researcher ended up with a fairly representative sample anyway. In this study, the researcher interviewed eight women and six men. This is also a characteristic in the larger school business setting, with about half of ASBO members represented by each gender. Also typical of ASBO membership, this group of respondents largely came to school business from the private sector with business or

finance backgrounds. Only two of the fourteen participants have undergraduate degrees in education. The respondents work in a variety of school settings, and represented districts of all sizes and locations with the exception of the southeast regions of the United States.

The purpose of this study was to engage working school business officials across the U.S. and learn about their perceptions of the additional skills needed to be most successful in the current economic and political environment; an environment troubled by reduced public school funding due to the recession plaguing the nation. Specifically, the researcher was most interested in examining the perceptions of SBOs about their role in relation to student achievement and equitable educational practices, and in examining SBO perceptions about best practices in resource allocation when faced with significant budget reductions. Close inspection of participant responses from three connected theories and/or perspectives provided the framework for examination, including critical social theory, leadership for social justice theory, and the perspective of bridge leadership

The Technical Nature of School Business Remains Most Important

Box (2008) asserts application of the social critical perspective to public administration can lead to greater understanding among this group of workers about conditions that shape and constrain social change and oppression within policies. Considering social critical theory, the participants involved in this study showed more concern with micro implementation over macro societal issues such as socially just practices in resource allocation and equitability. Micro implementation, in the context of public administration, pertains to those things which are highly technical such as analyzing and managing budgets; gathering and organizing information; preparing, analyzing and reporting financial information. Regardless of academic and work background, private or educational, this was especially apparent when examining dialogue

related to what SBOs believe to be their most important role. Responses varied, but generally addressed one of three areas including providing financial and operational leadership, effective communication of budget issues, and running the business side of schooling as efficiently and effectively as possible.

The work of the school business official is highly technical and managerial in nature and requires skills which elevate their ability to appropriately allocate and manage public school dollars and resources, as well as manage ancillary services. In keeping with earlier studies, participants in this study substantiated the belief that it was most important for SBOs to be able to analyze and manage budgets and present financial data to constituents. This is not surprising, given a study completed by Cambron-McCabe & McCarthy (2005) which concluded the focus of educating school leaders has more often addressed technical effectiveness and efficiency as well. While technical expertise is valid, these authors suggested ignoring the skill sets necessary for administrators to better understand values, attitudes, and behaviors evident in the school community could undermine efforts to substantially affect issues of educational injustices. While this suggestion targeted district and building-level administrators and instructional decisions, it can also apply to those administrators most responsible for resource allocation and budgeting decisions. Frederickson (1990) reminds the SBO efficiencies and economies are of little importance if we fail to understand the students for whom we are working.

Influence and Collaborative Skills of the SBO

Participant responses indicated the budget process was understood and managed by the SBO and his or her staff. Once the budget was established, the SBOs perceived themselves as very collaborative and believed they served the larger administrative team in interpreting financial resource management. When asked if they were part of an administrative team and

whether or not they were influential in the process of helping guide policy and program decisions, each individual interviewed indicated they were highly involved. They pointed out they were collaborative because they had a significant role in guiding decision-making related to use and/or reduction of resources and were able to objectively bring this information to administrative cabinet meetings.

SBOs have become vital members of district leadership teams and can often provide a strong voice in strategic planning and district-level decision-making, and not just those concerned with fiscal management (McClain Jr & King, 2009; Ray, et al., 2001; Task Force on School District Leadership, 2001). Not only were these participants very involved in the process of setting policy and programming, respondents indicated they were highly influential in the ultimate decisions made related to the amount of money spent and how dollars are distributed. In at least one case, the SBO was left in charge of the district in the absence of the superintendent.

More often than not, interviewees believed their most important role as a school business leader was to provide financial leadership and to effectively communicate the budgetary issues in a meaningful way to all stakeholder groups. Communication was often seen as a way to offer budgetary information to help the larger administrative team make good decisions about programming and curriculum. Often well intended, the underlying message gleaned from SBO responses indicated they believed they were more uniquely positioned to be objective “about all sides of the house” because they were in better positions to know enough about all aspects of schooling and “to know there are more efficient ways to run these programs.” In many cases, there were deliberate statements about the disparity of ability between those leaders who were trained in business and finance as opposed to those trained in education. Some school business officials offensively dismissed educators for their lack of experience in school finance and

private sector work, suggesting educators could not possibly make good decisions related to the budget. These types of comments reflect more recent literature, as Osberg (2010) states

With district leadership typically dominated by former teachers or education administrators – transplants from the private sector are the exception rather than the norm – this financial, analytic mind-set does not come naturally to many superintendents. And given the historical norm of ever-increasing funding for schools, there has been little incentive or urgency for superintendents or other education leaders to focus on developing these skills over others (p. 296).

This understanding contributes to the status quo, existing power structures, and those who dominate decision making in public education because they are experts and know what is best.

SBOs interviewed understand their role is to provide valid financial information, but also believe the information they distribute is essential in guiding important policy and programming decisions. They also believe their financial backgrounds and participation are valuable to the administrative team and is especially critical to the school system in which they work. This is especially obvious when discussing resource allocations during periods of budget reductions.

SBOs Were Not Bridge Leaders

Interviewees do not believe they are serving as Bridge leaders, nor do they really see how their work connects to student achievement, much less to equitable educational practices. Some interviewees showed a reluctance to discuss concepts of bridge leadership and social justice. Participants who were probed to further explain their perceptions of Bridge leadership did not show a clear understanding of the concepts of social justice and lacked a critical consciousness

about issues of equity. Participants viewed their role as supporting the educational mission of the school, and finding and managing the available resources in an efficient manner. SBOs believed they were contributing to social justice and equity by supporting the “educational mission” and “providing resources in an efficient manner.” In many cases, the SBOs interviewed could not clearly articulate how their role was even connected to student achievement. Some participants conveyed an interest in social justice and bridge leadership by indicating the most important thing to them was student achievement and closing the achievement gap. Deanne said she thought it was important to think about what she could do in her role to help improve student achievement. Nikki said it was important to look at the way resources were used and how those “resources actually turn into support for student achievement.” Lana said she would like to have more ideas about what her job has to do with student achievement.

No respondent shared the need or ability to disrupt inequitable practices when allocating resources, or when contributing to shared decision making processes. These responses, as well as those of other SBOs interviewed, might substantiate how little they understand injustice and inequity and the role they play within their institutions in perpetuating and reproducing inequitable power structures. In fact, many responses presented during the interview process focused more on the expertise and knowledge held by the SBO, potentially conveying the importance of sustaining power structures within their organizations. Having little understanding of social injustice, these SBOs have separated themselves from the daily practices of those leaders in education who make issues of marginalization central to their thinking and work. In some cases, they have become part of those existing taken-for-granted structures and norms that perpetuate the status quo in education, rather than leaders who focus on the conditions

perpetuating inequities in schools, who work to change institutional practices and school cultures that support injustice.

SBOs believe they are acting in a fair and equitable manner, and have student interests at heart. Respondents, however, generally misunderstood how their work was related to socially just practices and issues of equity, indicating these macro-level constructs remain abstract and out of the realm of SBO thinking. Interviewees were clearly removed from conceptualizing these ideas into daily practices. Although some SBOs could articulate school achievement data and an achievement gap, there was little capacity to draw a connection between their work and low achievement and other issues of social injustice.

It is not necessarily unreasonable for this group of school business leaders to separate themselves from these issues. There are few, if any, opportunities for SBOs to participate in dialogue or professional experiences that acknowledge these matters or the role played in perpetuating or breaking the cycles of injustices. State and national business association meetings most often focus on technical aspects of school business, although some participants could more readily see a more significant focus on student achievement at the national association level. No participant conveyed they had participated in professional development experiences addressing specific issues of social justice and equity, or addressing how the school business leader's work was in any way connected to these concepts.

Unresolved Finance Issues

The inequitable and inadequate distribution of educational resources and the persistent achievement gap between middle class whites and other categories of students is well established (Burrup, et al., 1996; Figlio, 2004; Glenn, 2009; Ladd, et al., 1999; Lee & Wong, 2004; Lukemeyer, 2004; Maidens & Stearns, 2007; Oakes & Lipton, 2002). Despite this preponderance

of research, there have been no significant changes in state funding schemes across the U.S. and many problems related to financing education remain unsolved. Springer, Houck, and Guthrie (2007) stated, “Much of modern education finance policy is rooted in questions that have persisted over 100 years” (p. 3). According to Wong, policies enacted by three political levels of governance – federal, state, and local – “have largely failed to close the resource gap between rich and poor districts and within districts, between schools in stable neighborhoods and those in poor neighborhoods” (p. 282). SBOs interviewed are working in a time of severe cuts, and are challenged even further by an overall negative perception of public education.

Implications

Findings and conclusions cited above give rise to implications and possible recommendations to improve the practices of SBOs when thinking about issues of fiscal management, social justice and equity. A number of suggestions, grounded in data and supported by literature, are intended as a starting point for discussion

Connect Leadership to Technical Skills

There is an apparent false dichotomy between leadership and technical skills. Technical skills are very important for the school business office to have, but as leaders, they also need to understand for whom and what they are budgeting (Frederickson, 1990). In this context, it becomes important to understand the complexities of public education and how they work as leaders in collaboration with many other stakeholders, including superintendents, other cabinet level members, Board of Education members, teachers, students and parents to benefit all students learning to high standards.

Most importantly, SBOs should understand and articulate the explicit connection between their work and all students achieving regardless of race, class, gender, disability, sexual

orientation, and other historically and currently marginalizing conditions in U.S. public schools. School business leaders can better understand the connection between resource allocation and academic achievement, and how best to use resources to achieve outcomes as established “on the academic side” of schooling. In the language of public administration, SBOs would do well to consider opportunity cost; a crucial part in ensuring that scarce resources, not just those pertaining to monetary or financial costs, are used efficiently. Opportunity cost in the case of public education would consider the benefit(s) a child or group of children could have received had an alternative action been taken, i.e., different use of resources. This requires consideration of all areas where dollars should and should not be spent, as well as where and how resources should and should not be used. Roza (2010) substantiates this by stating, “The practice of breaking down budgets to find the cost of what is provided is an important lens on an organization’s expenditures, particularly in times of constrained revenues” (p. 72).

Improve SBO Training and Professional Development

Adequate training and preparation is necessary before one can be prepared to make contributions that support equitable treatment of all students through appropriate resource allocation. Levenson (2010) suggests budget development takes “training, time, and data” (p. 244). The researcher suggests budget development that focuses on social justice and equity takes even more understanding. One should not assume because SBOs have an undergraduate degree in finance, business management, or education that they are necessarily prepared to understand issues of social justice that pertain to public schooling. SBOs should have pre-service and ongoing opportunities to discuss and understand funding inequities and the repercussions caused by the inequalities of education offered to students of poverty. It may be appropriate to presume there is little opportunity to explore these issues, neither in college level training nor through

state and national school business association professional development experiences. It is unfair to assume school business leaders understand that students of poverty, as well as other marginalized students, actually need more funding to achieve at the level of their wealthier, white counterparts (Brooks, 2007; Theoharis, 2009).

Many of the participants in this study did not understand the connection of their work to improve student achievement. Higher education faculty who train educational leaders are more than ever called to integrate important technical skills with “beliefs that emphasize educational justice, ethical values, equity, care and respect” (Lalas & Morgan, 2006, p. 23). School business leaders can and should become familiar with the policies, programs, and practices that have the greatest payoff in higher achievement, especially for marginalized students who have potentially suffered from inequitable funding policies.

Practice Collaboration and Transparency in School Funding

School business leaders often make crucial decisions regarding how money is spent and allocated, often with little input from those groups of stakeholders most affected. School business officials must take steps to make school funding a collaboratively and more transparent process (Levenson, 2010). Funding decisions cannot be made in isolation, and SBOs can no longer assume they know best regardless of their educational background or technical knowledge. Transparency in school budgeting must include a way to provide all stakeholders an understanding of a district’s fiscal decisions and the implications each of those decisions has on students, individual schools, and district operations (Hawley-Mills & Darling-Hammond, 1997). This can be done through appropriate and on-going public reporting, and by bringing parents and other community members into the budget prioritizing process.

Establish Best Practices

School business professionals should consider research as a guide to examples of best practice in school finance and resource allocation. There is a preponderance of research providing evidence documenting the continued discrepancy in accessible education between historically marginalized groups of students and their white middle and upper class peers (Brooks, et al., 2007; Jean-Marie, 2008; Marshall & Oliva, 2006; Theoharis, 2009; Theoharis & Causton-Theoharis, 2008). Further research connects resource management to the larger issue of appropriately allocating dollars that best support these marginalized groups. For instance, Hawley-Mills and Darling-Hammond (2007) maintain schools are more likely to be successful in the appropriate allocation of resources when a comprehensive vision is in place to include goals for student achievement, educational strategies, and appropriate organization to accomplish stated goals. School business officials must have access to the most current research, and develop those best practices substantiated through it.

Role of National and State Associations

McClain and King (2007) concluded ASBO should make leadership skills a stronger component of its professional standards. This organization has already established school districts should operate within an efficient and effective business and financial framework in order to successfully meet the needs of diverse and challenging populations of students (Association of School Business Officials International, 2006). ASBO and state affiliates should take the lead in helping SBOs understand their bridge leadership role in connection to socially just practices and student achievement. Without the support of these organizations, SBOs have little opportunity to grow professionally once they are working in the field. Understanding and working to improve instructional effectiveness is embedded within the ASBO standards, but

these guiding principles are never explicit in connecting resource management and business office roles to social justice, equity, and student achievement.

Resolve the Issue of Education Finance

The three levels of government – local, state, and national – have not been able to resolve issues of public school finance (Wong, 1994). When relying on local taxpayer ability to meet the costs of education, as is common to schools throughout the U.S., little can be done to improve equal educational opportunities for the neediest of learners (Burrup, Brimley, & Garfield, 1996). Even when supported by state and federal dollars, local school entities vary widely on the quality and degree of educational services provided to students.

There is opportunity for stakeholders to come together and develop appropriate solutions to address both adequacy and equity with the impending reauthorization of the Elementary and Secondary Education Act. ASBO and state affiliates may want to take the lead in providing a funding scheme that would serve to benefit all students learning to high standards and at the same time provide a solution to the historic issues of funding disparities among and between states. Equal opportunity, rather than equal resources, should be the guiding principle throughout this discussion. Unequal treatment is required to provide equal opportunity. It is commonly understood that more money, more talent, and more time are needed for some students to meet performance standards (Childress, 2010).

In conclusion, this study supports further research about school business officials and the important contribution they make to public education and the students they serve. There is much to learn about perceptions of those SBOs from both educational and private-sector backgrounds, and the factors which most influence their decision making in resource allocation.

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APPENDICES

APPENDIX A

INTERNATIONAL ASSOCIATION OF SCHOOL BUSINESS OFFICIALS PROFESSIONAL STANDARDS

The Educational Enterprise:

Organization and Administration

The school business official understands and demonstrates the ability to

Identify and apply various organizational leadership models

Identify techniques for motivating others, delegating authority, decision making, information processing, planning, and allocating resources

Examine methods of assigning personnel and resources to accomplish specific goals and objectives and to utilize scheduling techniques for the coordination of tasks to maximize personnel and resource utilization

Identify problems, secure relevant information, and recognize possible causes of conflict

Utilize questioning techniques, fact finding, categorizing information, and retention of relevant data

Apply concepts of change, group dynamics, interpersonal relationships, and effective problem solving

Delegate and assign responsibilities to staff; collect, analyze, and evaluate information to generate contingency plans; and apply basic concepts of organizational development

Maintain a positive working relationship with all staff.

B. Public Policy and Intergovernmental Relations

The school business official understands and demonstrates the ability to:

Develop and apply the policies and roles of all relevant education authorities and local and national governments

Identify the role of special interest groups (public and private) within a school district and their ability to influence those who approve district policy

Analyze the political and legislative process as it relates to local board elections, municipal governments, state/provincial legislatures, and other governmental jurisdictions

Use the skills necessary to interpret and evaluate local school board policies and administrative procedures to ensure consistent application in the daily operation of the school district.

APPENDIX A (continued)

C. Legal Issues

The school business official understands and demonstrates the ability to:

Identify the local and national constitutional rights that apply to individuals within the public and private education system

Review and analyze appropriate statutory and constitutional authority regarding the administration of public and private schools

Review and analyze significant statutory and case law relative to financial resource management, human resource management, facility management, property management acquisition, information management including freedom of information and protection of privacy, and management of ancillary services

Apply the highest values and ethical standards as they relate to the entire profession of school business administration

Protect all stakeholders' interests with respect to responsibility and financial integrity.

Financial Resource Management:

A. Principles of School Finance

The school business official understands and demonstrates the ability to:

Apply economic and financial markets/theories

Recognize and forecast the major sources of revenue available to the school district from local and national governments and other sources

Interpret the relevant governmental funding model

Analyze the impact of shifts in local and national funding and the effect on local spending plans

Apply multiple techniques for identifying expenditures across cost centers and programs

Explore alternative and innovative revenue sources

Recognize and analyze significant social, demographic, and economic changes that may impact the financial plan of the district.

B. Budgeting and Financial Planning

The school business official understands and demonstrates the ability to:

Prepare a budget calendar to meet the time constraints of budget preparation

Use multiple approaches to determine reliable enrollment and personnel projections

Forecast anticipated expenditures by program

APPENDIX A (continued)

- Identify various methods of budget analysis and management
- Apply statistical process control techniques for budgetary analysis
- Apply the legal requirements for budget adoption
- Prepare revenue projections and estimates of expenditures for school sites and district-wide budgets
- Recognize and explain internal and external influences on the budget
- Maximize state/provincial/national aids for the district
- Communicate the relationship between programs, revenues, and appropriations of the school district to the stakeholders
- Develop multi-year budgets that serve as a communications tool for the stakeholders
- Develop a financial model to monitor a school district's financial health
- Analyze comparable data of other school districts.

C. Accounting, Auditing, and Financial Reporting

The school business official understands and demonstrates the ability to:

- Obtain the services of an internal and external auditor
- Establish and verify compliance with finance-related legal and contractual provisions
- Communicate the relationship between programs, revenues, and appropriations of the school district to the stakeholders
- Prepare, analyze, and report financial statements and supporting discussion documents to the board of education throughout the fiscal year
- Prepare a corrective action plan from the information conveyed in the annual audit report to improve financial tracking and reporting and internal controls and guide the implementation of the plan
- Apply concepts and standards of accounting relevant to the district's location
- Adhere to the accounting standards setting governing body and prepare financial statements in accordance with the most current standards as issued by such body
- Report the financial status of the district to the appropriate state/provincial agency in the appropriate regulatory format, which may be on a generally accepted accounting basis or on a customized/regulated basis of reporting.

D. Cash Management, Investments, and Debt Management

The school business official understands and demonstrates the ability to:

- Select professional advisors/contractors such as bond counsel, rating agencies, financial advisors, and underwriters
- Use lease purchasing and partner with other jurisdictions such as municipalities, counties, and other school districts

APPENDIX A (continued)

Develop/recommend investment policies for the governing board to include investment objectives such as maximizing investment income and preserving the investment principal

Develop specifications for the selection of banking and other financial services

Apply the concept of compensating balances

Comprehend procedures and legal constraints for cash collection and disbursement

Calculate the yields and understand the risks of various investment options legally available to a school district

Apply various methods of cash forecasting

Apply appropriate types of short-term debt financing instruments available to school districts

Analyze monthly internal transfers and loans

Analyze the legal constraints and methods of issuing long-term general obligation bonds, including the bond rating process and the role of the bonding attorney and rating services

Analyze the implication of arbitrage rules that may apply to the issuance of long-term general obligation bonds; provide for arbitrage payable when appropriate

Prepare a cash flow analysis, including a fund balance report, for the board of education

Review accrued receivables and understand permitted collection processes.

E. Technology for School Finance Operations

The school business official understands and demonstrates the ability to:

Keep current with technology applications and programs

Assess the district's needs related to available budget dollars for technology

Ensure that the district technology plan is designed to meet the district's goals

Develop an operational plan to meet the district's financial goals and objectives.

Human Resource Management:

A. Personnel and Benefits Administration

The school business official understands and demonstrates the ability to:

Coordinate the development and management of an appropriate personnel database to provide seamless integration with payroll and other school district functions

Manage and continually evaluate the effectiveness of the school district's payroll operations

Administer employment agreements including interpreting contract language, considering the concepts of "past practice," "just cause" provisions, and grievance procedures

APPENDIX A (continued)

Assist with the processes related to the recruitment, selection, orientation, assignment, evaluation, and termination of school district personnel
Ensure the selection and hiring of the most qualified individuals for positions, adhering to all local and national rules and regulations
Research and explain various compensation arrangements including salaries and wages, employee health care benefit programs, and retirement options
Coordinate the procedures for termination of employment including the concept of “due process” and an awareness of the procedures, usually governed by collective bargaining agreements, with respect to reduction in work force.

B. Professional Development

The school business official understands and demonstrates the ability to:

Conduct needs assessments to identify areas and content for training and development
Build a professional development system, based primarily on adult motivation research, to improve the performance of staff members and to assist staff in meeting the educational objectives of the school district
Ensure all staff meet training and continued education requirements to comply with local and national rules and regulations
Identify appropriate procedures for the management and evaluation of professional development programs
Involve all school district staff in determining their professional development needs that can significantly enhance the effectiveness of employee training and development programs.

C. Labor Relations and Employment Agreements

The school business official understands and demonstrates the ability to:

Analyze jurisdictional and governmental laws and regulations with respect to employment agreements
Continually conduct and analyze benchmark surveys to assess the cost of current salary and employee benefit packages and proposals
Analyze current employment contracts and/or collective bargaining agreements and develop comparative reports with local and national agreements
Identify and monitor compliance with the grievance procedures as set out in employment agreements and local and national law

APPENDIX A (continued)

Review local and national laws and regulations with respect to impasse procedures such as mediation, voluntary arbitration, and binding arbitration.

D. Human Relations

The school business official understands and demonstrates the ability to:

- Diagnose, maintain, and when necessary, improve organizational health/morale, including increasing focus on employee wellness programs
- Develop policies and procedures for the management of school district personnel
- Develop employee assistance programs and evaluate their impact on the school district's staff morale
- Frequently monitor performance through constructive evaluations, including a comparison of standards and goal-setting to ensure accountability
- Identify and implement procedures for conflict resolution and team building to enhance morale and productivity
- Help create a high performance work system by fostering open communication and feedback throughout all levels of the district
- Recognize and promote compliance with standards of ethical behavior and standards for professional conduct applicable to all school district staff
- Stay current with management theory and leadership styles including concepts of behavioral science, organizational structure theory, developing and maintaining organizational culture, and managing organizational change.

Facility Management:

A. Planning and Construction

The school business official understands and demonstrates the ability to:

- Develop a long-range facility plan that includes demographic data and serve as an integral member of the planning team
- Develop a working knowledge of funding sources and issues related to school construction, including bond ratings, the rating process, and bond election processes
- Develop appropriate procedures for selecting architects, engineers, construction managers, and other professionals
- Apply the steps and procedures involved in developing and using education specifications for selecting school sites
- Review the legal and administrative responsibilities for advertising, awarding, and managing construction contracts
- Recognize the impact of energy and environmental factors on the learning process

APPENDIX A (continued)

Meet the requirements of local and national agencies regarding construction and renovation of school facilities
Communicate financial implications of unanticipated issues during the construction process to appropriate personnel in order to guarantee project solvency
Involve appropriate existing district/agency personnel who have experience with local energy demands, materials choices, and contractor regulations to share their concerns during construction job progress meetings.

B. Maintenance and Operations

The school business official understands and demonstrates the ability to:

Administer procedures required to keep schools clean, safe, and secure through effective custodial services and preventive maintenance
Manage energy consumption and environmental aspects
Determine resource allocation for maintenance and operations
Develop a crisis management plan
Maintain a positive working relationship with staff, contractors, and suppliers
Be knowledgeable of sources of alternative revenue (other than debt or tax levies) such as grant revenue to meet facility needs
Be able to effectively form partnerships with the private sector to enhance resources available to the district in regard to facilities and equipment
Utilize technology to improve facilities through data management.

Property Acquisition and Management:

A. Purchasing

The school business official understands and demonstrates the ability to:

Develop and implement an integrated purchasing process that complies with all government regulations
Adhere to a strict code of purchasing and procurement ethics
Develop and implement a bid procurement system that complies with all government regulations
Analyze and, if feasible, implement an e-procurement system that complies with all government regulations
Obtain good value for each procurement
Properly and effectively apply the rules, regulations, and statutes that govern school procurement

APPENDIX A (continued)

Determine and produce the most appropriate method of source selection for each procurement
Formulate competitive procurement solicitations that are fair and reasonable and that promote open competition
Conduct all procurement without conflict of interest, impropriety, or any attempt to obtain personal gain.

B. Supply and Fixed Asset Management

The school business official understands and demonstrates the ability to:

Develop and implement a system to manage and track supply inventories and distribution
Develop and implement a program for the effective current and long-range acquisition, maintenance, and repair of equipment
Develop a system to reallocate and/or dispose of surplus, scrap, and obsolete materials and equipment
Develop and implement a system for the proper valuation, classification, and depreciation of fixed assets
Develop and implement a system to adequately control and account for capital assets.

C. Real Estate Management

The school business official understands and demonstrates the ability to:

Coordinate with other government agencies regarding zoning, land use, and other real estate issues
Develop and implement procedures for the acquisition and disposal of land and buildings
Develop and implement a use of facility system that complies with all government regulations.

Information Management:

A. Strategic Planning

The school business official understands and demonstrates the ability to:

Participate in administrative and employee teams in the identification of short- and long-term goals in all aspects of school district activities
Assist with the development and communication of a vision of the preferred future of the school district, drawing from current research and best practice

APPENDIX A (continued)

Assist in the development of a strategic plan that will move the district toward the achievement of its mission and goals
Assist in providing the data required to facilitate the strategic planning process
Assist in the implementation, monitoring, evaluation, reporting, and revision of a strategic plan.

B. Instructional Support Program Evaluation

The school business official understands and demonstrates the ability to:

Apply a practical and research-based knowledge of the components and skills to evaluate programs and business services
Identify various economic and cost factors inherent in program operation and evaluation
Develop and apply procedures for the systematic evaluation of instructional support programs
Analyze, develop, and apply various methods of measuring instructional goals and program effectiveness
Effectively manage a change process when evaluation determines that instructional support programs must be improved.

C. Instructional Program Evaluation

The school business official understands and demonstrates the ability to:

Support the components of the instructional programs within the school district
Participate in the planning and implementation of instructional program improvement
Analyze the various economic factors associated with the delivery and evaluation of instructional programs
Develop procedures for the evaluation and reporting of the cost effectiveness of instructional programs
Utilize evaluation data toward the development of instructional program changes
Effectively participate in the change process when instructional programs must be improved
Assist in directing and facilitating the allocation of resources within the school district toward the improvement of instructional programs
Assist in directing and promoting the allocation of resources for professional development leading to improved instructional programs. Participate in the planning and implementation of instructional program improvement
Analyze the various economic factors associated with the delivery and evaluation of instructional programs

APPENDIX A (continued)

Develop procedures for the evaluation and reporting of the cost effectiveness of instructional programs
Utilize evaluation data toward the development of instructional program changes
Effectively participate in the change process when instructional programs must be improved
Assist in directing and facilitating the allocation of resources within the school district toward the improvement of instructional programs
Assist in directing and promoting the allocation of resources for professional development leading to improved instructional programs.

D. Communications

The school business official understands and demonstrates the ability to:

Comprehend effective communication strategies and techniques related to mass and interactive communications
Identify the primary components of public information management and public relations
Develop a clear understanding of the major constituencies within the school district
Present financial data to various school and community groups in written, oral, and multi-media formats
Assist in the development of a plan for a positive school community relations program for the business office and the school district
Assist in the development of procedures for the management of public information programs and departments that relate to school–community relations.

E. Management Information Systems

The school business official understands and demonstrates the ability to:

Direct or develop management information systems
Apply the most current technology to the storage, analysis, and communication of data (fax, electronic mail, administrative and educational computer systems, etc.)
Evaluate the cost benefits and organizational value of producing information
Develop, maintain, and validate a records management system using appropriate technology that complies with all legal requirements
Develop and maintain an accurate database to facilitate management decisions using current information management techniques
Administrate a computerized management information system
Ensure that appropriate data security and privacy of records are maintained
Assist in the integration and gathering of information for public relations purposes

APPENDIX A (continued)

Assist in and coordinate the gathering and reporting of information for government reports

Maintain and protect the historical records archive of the school district

Assist in the development and implementation of technology in the business office and the classroom environment

Maintain a working knowledge of the technology and software available for school and business office use

Direct or develop specific plans for secure student and employee access to the Internet

Evaluate the cost of Internet access options for the school district

Evaluate and apply various technology tools for use in the school and business office

Assist in the development of long-range technology planning for the school district

Promote and assist in the development of technology training for all staff

Allocate appropriate resources toward the purchase and installation of technology and technology infrastructures in the business office, the school office, and the classroom

Develop appropriate specifications for purchasing technology and contracting for technology infrastructure for the school district.

Ancillary Services:

Risk Management

The school business official understands and demonstrates the ability to:

Ensure that a comprehensive risk management program is in place

Ensure the risk management program addresses safety and security

Assess risk management programs and recommend changes consistent with district needs

Identify and apply models for the evaluation of potential risk management programs

Identify and evaluate alternative methods of funding and managing risk

Communicate the risk management program to all stakeholders

Direct the process of selecting/employing an insurance consultant or risk manager

Adhere to legal requirements for insurance coverage.

B. Transportation

The school business official understands and demonstrates the ability to:

Support and maintain a student transportation program that adheres to all legal requirements

Ensure (where appropriate) that the school bus maintenance and replacement program is established and maintained

Monitor the student transportation program for its safety, security, and efficiency and make adjustments as needed

APPENDIX A (continued)

Analyze alternative methods available for providing transportation
Ensure (where appropriate) an efficient and comprehensive routing system is developed and maintained
Ensure a comprehensive plan is in place that includes an analysis of what transportation requirements are and the basic features of a system to provide pupil transportation, and where appropriate, arrangements for screening, training, re-training and retaining bus drivers, paraprofessionals, and other essential transportation personnel
Develop and maintain open and clear lines of communication with parents, staff, administration, state/provincial legislatures, and the public for the purpose of conveying the responsibilities, needs, and expectations of all stakeholders.

C. Food Service

The school business official understands and demonstrates the ability to:

Establish procedures for the implementation and operation of the food service program
Adhere to the legal requirements, including local and national government guidelines of the food service program
Monitor the food service program and make adjustments as needed
Ensure the management systems for tracking meals and inventories are in place and identify participant status
Manage and control inventories and procurement
Ensure compliance with required nutritional value is in place
Analyze the methods available for providing food service and identify and recommend the most beneficial methods for a given situation
Interface with nutrition and regulatory agencies relative to planning, conduct, and reporting of catering service programs within the school
Ensure effective cash handling procedures and internal controls.

APPENDIX B
INTERVIEW QUESTIONS

Opening Question: What is your current position and how did you become interested or involved in a career in school business?

Transition Question: How would you describe the school district in which you work?

Key Question: What are the most important issues your district is dealing with this year?

Key Question: What can you tell me about your district's achievement data?

Key Question: What do you consider to be the primary or most important role(s) of the school business leader? What is your role in relationship to the superintendent, other district level administrators, teachers, and students? Do you play a role in policy development and implementation?

Key Question: Educators often talk of educating all students to high standards. How does your role as a school business official connect to student achievement? How is resource allocation fundamental to student achievement?

APPENDIX B (continued)

Key Question: Thinking about your role in school business, what is your response to the following quote? "...leaders in education, with technical and managerial skills alone, fail to meet the realities of contemporary challenges in education."

Key Question: Given the current economic and political climate, what do consider best practices in the area of school finance? Give specific examples of practices you are using in your district.

Potential Question: Within the last ten years, the concept of bridge leadership has emerged in educational research and literature. Bridge leaders are known for focusing on an agenda that includes some of the things you have talked about, such as decreasing the achievement gap, increasing the quality of schools for all students, and providing necessary resources. It connects to the work of the SBO as mobilize and generate resources to strengthen initiatives that contribute to achieving social justice. Do you consider your role in school business to be an educational leader who works as a bridge leader as I've defined it? If so, what specific areas of your work show bridge leadership qualities?

Transition Question: Of all the issues discussed in this interview, which one is most important to you?

APPENDIX B (continued)

Final Question: Is there anything about school business leadership I should have asked about but did not?

APPENDIX C
CONSENT FORM



Department of Educational Leadership
Box 142, Wichita, KS 67260-0142
316-978-3325

Purpose: You are invited to participate in a study examining the perceptions of school business administrators about how they can work most effectively with school leadership teams to leverage district funds which best support student achievement and equitable educational practices, while minimizing the detrimental effects of nationwide budget cuts. The researcher hopes to learn about school business administrators' understanding of their leadership practices and collaborative role played in addressing issues of equity and student achievement.

Participant Selection: You were selected as a possible participant in this study because you are a school business administrator working in a U.S. public school system. Participants will be within the first ten years in a position of school business administration, and a member of an ASBO Bridge to the Future cohort group. This group of school business administrators was selected for this study because of their interest in school resource management, job position, and amount of time in current position. Approximately 15 to 20 school business administrators will be interviewed.

Explanation of Procedures: If you decide to participate, you will take part in online interviews via a telephone interview. I will contact you by email to schedule an interview time

APPENDIX C (continued)

and date. Once a time and date have been agreed upon, I will call you via the telephone connection and spend approximately one hour in the interview process. I will ask you approximately 7 to 10 interview questions. You can respond or decline to respond to any question. I will ask you follow-up questions as needed to clarify your responses. The number of follow-up questions may vary based upon your responses. In some cases, I may send you an e-mail asking for further clarification of your response, or seeking to verify your intended meaning to a particular question. As previously mentioned, you may respond to my email, or you may decline to respond at any time.

Discomfort/Risks: There are no anticipated risks or discomforts. Inconveniences may be related to the time required to respond to researcher questions.

Benefits: Most research focuses on the role of superintendents, teachers, and students in the public school arena, leaving a definite void in shaping critical aspects specific to the work of the school business official. Emergent research is needed to establish the school business administrator's knowledge and perspectives related to best practices in resource management in the context of social justice and equity. I plan to disseminate the results of this study through presentations at state and national conferences and publications in journals to others might benefit from what is learned in this study.

Confidentiality: Any information obtained in this study in which you can be identified will remain confidential and will be disclosed only with your permission.

Refusal/Withdrawal: Participation in this study is entirely voluntary. Your decision whether or not to participate will not affect your future relations with Wichita State University.

APPENDIX C (continued)

If you agree to participate in this study, you are free to withdraw from the study at any time without penalty.

Contact: If you have any questions about this research, you can contact me at: J.K. Campbell, 2545 Greenway, Arkansas City, Phone #(620) 441-2000, Email jk.campbell@usd470.com or jkcampbell0657@gmail.com, or my advisor, Dr. Jean Patterson, at Phone #(316) 978-6392 or Email jean.patterson@wichita.edu. If you have questions pertaining to your rights as a research subject, or about research-related injury, you can contact the Office of Research Administration at Wichita State University, Wichita, KS 67260-0007, Phone #(316) 978-3285

You are under no obligation to participate in this study. Your signature indicates that you have read the information provided above and have voluntarily decided to participate.

Please keep a copy of this consent form for your records

Signature of Subject

Date

Please mail, fax, or scan and email a copy of the signed consent form to: J.K. Campbell, 2545 Greenway, Arkansas City, KS 67005 or by email to jk.campbell@usd470.com or jkcampbell0657@gmail.com