

A NATIONAL SURVEY  
OF SCHOOL BOARD MEMBERS VIEWS ON RETRENCHMENT  
IN PUBLIC SCHOOL BUDGETS

by

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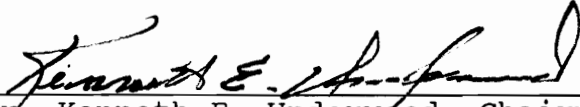
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(ABSTRACT)

The major purpose of this study was to ascertain the views of school board members concerning retrenchment in public school budgets. School board members make budget decisions within a framework of frequently competing priorities of increased pressures for improved school outcomes and relatively decreased revenues as a result of the current economic recession. Data were gathered from a national sample of school board members to determine what, if any, budget cuts had been made by local boards in their current operating budgets and what choices board members would make if cuts are required in the next budget. These data were then cross-tabulated with demographic variables.

Descriptive research methods were employed in this study. A stratified, random sample of school board members was identified from the list of subscribers to The American School Board Journal. Of the 23,958 board members in the population, 5271 or 22 % were surveyed using a mailed questionnaire. The response rate was 21%. The study was sponsored by The American School Board Journal, published by the National School Boards Association, the national professional organization for school board members in the United States.

The study revealed that funding had decreased for 47.5% of the respondents, and that as a result of funding shortages 56.3% of boards had reduced or eliminated previously funded programs. Specific cuts within the categories of positions, programs and services, salaries, and products were detailed. Meaningful differences related to the reductions were noted in relation to the variables of region of the country, type of community, and student enrollment. If further cuts are required in next year's budgets the most likely line items for reduction were school board development, athletic programs, extracurricular programs, and fringe benefits. The items identified as least likely to be reduced were regular education programs, teacher positions, teacher salaries, and textbooks.

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## Chapter 1

### INTRODUCTION

Members of local school boards in the United States are the key decision makers in the allocation of the nation's multibillion dollar investment in public elementary and secondary education. While operating within a highly decentralized education system, local boards have been buffeted by increasing pressures from numerous national and state entities for meeting an expanding list of societal needs without a proportionate expansion in financial support.

The nation's governors, jolted by America's diminished competitiveness in the global marketplace, formed a powerful coalition in 1986 to press for improved school outcomes and better prepared workers. Chaired by then-Governor and current Secretary of Education Lamar Alexander, the National Governors' Association issued its report, Time For Results (1986), and stated that "the nation's future prosperity and ability to respond to the incredible changes that will affect every citizen's life is [sic] closely tied to the excellence of our education system" (p. 41). Subsequently, the governors have been a catalyst for numerous state initiatives such as increased

graduation requirements and higher teacher salaries that have a direct impact on local district budgets.

Further undergirding the national concern with international competitiveness was the study produced for the Department of Labor, Workforce 2000, ( Johnston & Packer, 1987) which has formed the basis for much business and government planning. Among the recommendations it makes for moving the nation into the next century of competition within a global marketplace and economy is a focus on human capital formation through better education.

As the economy grows more complex and dependent on human capital, the standards set by the American education system must be raised (p.xiv)...Education and training are the primary systems by which the human capital of a nation is preserved and increased. (p.116).

The election of George Bush to the presidency with his vow to be known as "The Education President" continued the national focus on education. In 1989 his convening of a national education summit with the nation's governors resulted in a communique outlining six national education goals to be achieved by the year 2000. However, the federal proportion of education funding has not been increased in order to help support this effort.

In addition to the demands for preparing students to compete in the workplace, schools have also become the institution called upon to solve many of society's problems. Schools are being asked to devote more hours to academic studies while also educating students about an expanding list of issues such as drugs, AIDS, and other health concerns, dealing with students' personal and family problems which interfere with learning, and addressing the needs of an increasingly diverse student population.

Although the pressure continues for schools to meet all of these needs, the resources to provide the financial support have not kept pace. Funding for schools comes predominantly from state and local revenue sources, many of which have been affected negatively by economic recession. As reported by the National Governors' Association and the National Association of State Budget Officers the "slump in revenue caused by the recession have pushed state governments into their tightest financial bind in almost a decade" (Broder,1991,p.A3). Local governments have also been squeezed by stagnant or falling real estate values resulting in lower revenue from property taxes which provide a major part of local school funding. These combined effects of recession are resulting in fewer dollars on a relative basis available to support education.

which direct the flow of available school dollars in every district in the nation it is important to learn what budget decisions and cuts they have made. And because the climb out of recession will take time and school boards will continue to face lagging revenues it is also important to learn what items in the next budget board members identify as likely possibilities for cuts.

Although there have been some studies (Branstrator, 1984; Fink, 1984) dealing with retrenchment decisions by selected school boards within particular states, there has not been a national survey of school board members on this topic since 1981 (Underwood, Fortune, & Dodge). The situation today is more complex as board members struggle to deal, not only with recessionary effects, but also with increased competition from other agencies for public dollars. Factored into the equation as well are various constituencies seeking to influence board decisions.

This study was intended to provide data on budget decisions already made by school boards and to predict what choices board members would make if further cuts are needed. This information will be instructive for local school board members in providing a profile of what is happening with school budgets and whether there are differences across the nation. It will enable board members to have a larger context within which to view and to defend their own budget decisions. For superintendents

needed. This information will be instructive for local school board members in providing a profile of what is happening with school budgets and whether there are differences across the nation. It will enable board members to have a larger context within which to view and to defend their own budget decisions. For superintendents and school budget officials this study will be of interest in identifying those areas that are vulnerable to cuts and those that are protected. This will provide useful information for budget contingency planning.

#### Statement of Purpose

The purpose of this study was to collect information from a sample of school board members in order to describe what, if any, budget cuts have been made by local boards in their current budgets and to describe what choices school board members would make if cuts were needed in their next year's budget.

#### Research Questions

1. What, if any, budget cuts have local school boards made in their current operating budgets?
2. Do the budget cuts made by boards in current operating budgets differ as related to selected variables?

### Definitions

As used in this study the following terms have certain restrictions placed on their usage.

School board member: The term school board member refers to an individual, either elected or appointed, who is a member of a local board of education.

Demographic characteristics: This term refers to the variables of region of the country, student enrollment, or type of community that describe a local school district.

Personal characteristics: This term refers to the social descriptive variables of age, gender, race, occupation, income, and education identified by the individual school board member.

Relatively diminished resources: This term refers to the funding allocated to public schools as a proportion of total public spending.

### Limitations of the Study

1. The sample for this study was drawn from the population of subscribers to The American School Board Journal , not from the entire population of school board members in the country.

2. Because The American School Board Journal requires anonymity a follow-up survey in order to improve the response rate could not be undertaken.

3. The responses to the questionnaire were assumed to reflect the true attitudes of the respondents based upon their personal perceptions, observations, or experiences.

4. The researcher does not know how many school boards were represented by the respondents.

### Organization of the Study

This study of school board budget retrenchment decisions is divided into five chapters.

Chapter 1 contains the introduction, purpose of the study, research questions, definitions, and limitations of the study.

Chapter 2 contains a review of the literature relevant to the environment in which school boards are making their budget decisions.

Chapter 3 contains a description of the research method, selection of the sample, instrumentation, collection of data, and method of analysis.

Chapter 4 describes the data and the findings of the survey and provides an analysis of the data related to the research questions.

Chapter 5 contains the summary, conclusions, and recommendations of the study.



Chapter 3 contains a description of the research method, selection of the sample, instrumentation, collection of data, and method of analysis.

Chapter 4 describes the data and the findings of the survey and provides an analysis of the data related to the research questions.

Chapter 5 contains the summary, conclusions, and recommendations of the study.

## Chapter 2

### REVIEW OF THE LITERATURE

The purpose of this chapter is to provide a review of the literature relevant to the current political and economic pressures being placed upon public education in order to describe the environment in which school board members are making budget decisions.

#### The Political Environment

The pressures placed upon public schools are cyclical. During certain periods schools are expected to act as conservators of a shared heritage and in other periods they are expected to advance the goals of society. The latter is the situation today as our "loosely coupled" (Weick, 1976,1) education system is buffeted by demands for improved student performance and better prepared workers. Although "American education is distinctive in the decentralization of its funding and control" (Meyer, 1979) local school boards are being challenged to meet international achievement standards attained by countries such as Japan which have highly centralized, national educational systems. Notwithstanding the myth of local control of schools, the trend over the past century has been toward greater state authority and direction (Wirt,

1977). Nowhere is this direction more evident than in the dominant educational role being assumed by the nation's governors.

Responding to the plethora of reform reports of the early 1980's as well as the increasing economic competition from other nations the National Governors' Association in 1986 issued Time for Results: The Governors' 1991 Report on Education . The various task forces which contributed to the final report recognized the diversity within the nation's schools but focused on certain components which they believed would contribute to improved outcomes of public schools in general. Among the recommendations were:

- career ladder and merit pay schedules for teachers
- alternate routes into teaching
- competency tests for teachers
- professionalism of teaching
- parent involvement and school choice
- increased accountability
- better use of technology in schools
- school-readiness for at-risk students
- efficient use of school facilities.

The governors were pragmatic in recognizing that change would not come without cost.

And we know that change takes money. Education is the number-one expense in every state. States now foot more than 50% of the total bill for public schools...We have found that raising new funds for *better* schools is easier than raising new funds for more of the same...Governors want a new compact with professional educators in America, so that we can lead a coalition of everyone interested in schools and take the next steps together (Alexander, 1986, p.204).

Many states were able to increase education funding when the economy was strong, most frequently applying the dollars toward raising teacher salaries (Nathan, 1986). However, as state revenues began to shrink as a consequence of the recession in the late '80's, retrenchment in state education budgets began (National Governors' Association & National Association of State Budget Officers, 1991).

The continued national focus on education was underscored by George Bush during his campaign for the presidency when he vowed to be the "education President". The most visible action he has undertaken was the convening of the nation's governors in the 1989 education summit in Charlottesville. The President and governors jointly declared that "the time has come to establish clear,

internationally competitive" (Cuban, 1990, p.267). Together they issued the following national agenda:

By the year 2000:

- all children in American will start school ready to learn;

- the high school graduation rate will increase to at least 90%;

- American students will leave grades 4, 8, and 12 having demonstrated competency in challenging subject matter, including English, mathematics, science, history and geography; and every school in American will ensure that all students learn to use their minds well, so that they may be prepared for responsible citizenship, further learning and productive employment in our modern society;

- U.S. students will be first in the world in mathematics and science education;

- every adult American will be literate and will possess the skills necessary to compete in a global economy and to exercise the rights and responsibilities of citizenship;

- every school in America will be free of drugs and violence and will offer a disciplined environment conducive to learning.

Considering the current emphasis on improved outcomes from schools there are, nevertheless, those who assert that more money for schools makes no difference in student

achievement (Bennett, W. J.,1988; Chubb & Moe, 1990).

Although research has determined that socioeconomic status is the most powerful variable affecting student achievement, Baker (1991) concluded, after a reanalysis of available studies, that education spending is at least equally powerful. It is also more amenable to public policy action than is changing an individual's socioeconomic status.

In addition to the pressures coming from the governors and the President, advocates for various constituencies in the local community also seek to influence board decisions. In most communities school board members will be lobbied by school staff, representatives of other governing bodies, parents, businesses, teacher organizations, employee groups, taxpayers, and other special interest groups (Institute for Educational Leadership, 1986; Webb & Mueller, 1984; Wirt & Kirst, 1989).

Local school boards are also feeling the impact of the nation's changing demographics. The aging of the population has resulted in a reduction of the schools' natural constituency of parents."By the year 2000, about 13% of the population will be sixty-five years old or older and in the next thirty years, senior citizens will constitute well over 20 percent of an appreciably larger U.S. population." (Shane, 1990, p.12) As a consequence there will be a moderate increase in the numbers of school-

age children but considerable growth in adult and continuing education . Schools are also being called upon to serve increasing numbers of ethnic and language-minority students as well as more students from unstable, single-parent, and poor families (Hodgkinson, 1985; Webb & Mueller, 1984).

As such problems have become more complex and pervasive in American society the need for a broad range of enhanced public services in general has grown. School boards are thus presented with the paradox of dealing with the impact of these social problems on education programs while competing with outside social service agencies for an increased share of public dollars. In addition the nation's crumbling infrastructure, public transportation needs, increasing senior citizen population, and growing environmental concerns also have constituencies lobbying for the same public funds (Quindry & Fox, 1983; Tyack & Hansot, 1982; Wirt & Kirst, 1989) "The traditional notion that public schools are a collective responsibility of all society has lost its force" (Tyack and Hansot, 514).

#### The Economic Environment

Efforts to achieve and maintain educational quality and equity for

children and youth throughout the nation are more than abstract ideals. They are inextricably tied to taxes, money, and the allocation of public funds. The needs of students must be translated into educational programs; these programs must then be translated into staff, facilities, equipment, and supplies; and in turn these must be funded in dollar amounts (Robinson & Protheroe, 1987, 3).

Finding the dollars to fund these requirements in 1992 has become more difficult as the nation has endured an economic recession. Funds flowing into the public coffers have been affected in the federal, state, and local jurisdictions, each of which finances a portion of education expenditures. In 1990-91 the states' share averaged 49.3 percent and the federal government's share averaged 6.2 percent. (Education Vital Signs, 1991).

The recessionary effects were felt first by the states, and newspaper headlines from across the nation chronicle their economic hard times (Celis, 1991; Ifill, 1991; Rowland, 1991). "The states have slashed spending and raised taxes but will still wind up with the smallest balance in their accounts since fiscal 1983, the final year of the last recession" (Broder, 1991, A3). As the states have absorbed the revenue reductions, retrenchment has occurred throughout their budgets in the effort to balance



revenue and expenditures. Because one of the largest portions of any state's budget is education the shortfall in many states has resulted in decreased dollars for public education (Banks, 1991; Marquand, 1989; National Governors' Association & National Association of State Budget Officers, 1991; Ornstein, 1990; Phipho, 1991).

While the major recessionary impact was first evident in the state share of education funding, local revenue has also been affected by stagnant or falling real property values and a sluggish business environment (Hey, 1991). Localities rely overwhelmingly on real property taxes from homeowners and businesses to fund education (Johns, Morphet, & Alexander, 1983). Many local school boards are thus experiencing another wave of revenue reductions.

As local school boards struggle to cope in an unstable funding environment they must also recognize that there is competition for public dollars as a changing society shifts to other goals, including tax reduction. It is difficult to convey the concept that dollars now invested in education enhance human capital formation and ultimately will result in more dollars in the public purse (Cohn & Geske, 1990). Because the benefits of education spending are less immediately visible than that for some other public programs, school boards are at a disadvantage in making their case and school funding consequently becomes

vulnerable to budget cuts (Quindry & Fox).

Further complicating the economic picture is the growing concern about funding equity (Addonizio, 1990; Verstegen & Salmon, 1990;1991; Sample & Hartman, 1990). Although a local school board may address equity concerns among the schools in its district, a local board does not have the authority to redress disparities across the state or among states. That is the responsibility of the state legislatures. While recognizing that there are equity suits pending in state courts which may affect individual local boards, an examination of this aspect of the economic environment is beyond the scope of this study.

Various alternatives for cutting budgets with the least impact on the instructional programs have been advanced in the literature. These range from anecdotal examples of specific reductions (Bolick, 1991; Glass, 1988; Natale,1991) to a proposed analytic model for establishing system priorities prior to budget decisions (Black, 1991). Systematic studies of school budget retrenchment within particular states (Branstrator, 1984; Fink, 1984) and from the perspective of superintendents (Kelly, 1983; Wilder, 1983) have been made. However, not since Dodge's 1981 study has there been a national survey of school board members regarding actual budget decisions.

## Summary

This review of the literature focused on the political and economic pressures that are being placed on members of local school boards. The purpose was to clarify that board members do not make budget decisions in an isolated environment but function within the framework of frequently competing priorities.

Fueled by the needs of business to remain competitive in the international marketplace there is intensive national focus on improving student performance in relation to that of other countries. Building upon the work of the reform reports of the early 80's, the nation's governors and the President have jointly formulated a set of national goals to be achieved by the year 2000. School board members are also being pressured by different groups within the local jurisdictions to accommodate many educational and societal needs.

At the same time that these various publics are demanding improved outcomes from an increasingly diverse student population many local school boards are faced with relatively declining revenues as a result of the recession. The majority of school funding is supplied by the states and localities. For many districts the recession has resulted in two waves of revenue reductions; one occurring in state funding and the other in local tax receipts. In

addition, other constituencies are competing with the schools for public funding, and many politicians are reluctant to raise taxes.

Thus many local school boards are caught in the crunch between heightened demands for school improvement and lowered revenue with which to carry out the mandate.

## Chapter 3

### METHOD

The purpose of this chapter is to describe the research method utilized in this study, explain the sampling frame, describe the data collection instrument (questionnaire) and the procedures followed in its administration, and explain the statistical procedures used in analyzing the data. This study is a continuation of a series of research studies carried out by Virginia Tech in conjunction with The American School Board Journal. The method employed in this study parallels that used by Hatrick (1988), Yock (1989), Freeman (1990) and Seaton (1991).

#### Research Method

Descriptive survey research methods were used in this study.

A descriptive study describes and interprets what is. It is concerned with conditions or relationships that exist, opinions that are held, processes that are going on, effects that are evident, or trends that are developing (Best & Kahn, 1989, 76).

Babbie (1990) states that while a given survey will aim to satisfy more than one objective, the purposes of the survey may be separately identified as description, explanation, and exploration. Description aims at discovering the distribution of certain attributes or traits. Explanation additionally involves making explanatory assertions about the population. Exploration involves searching for additional components in the situation.

In carrying out a descriptive study Kalton (1983) states that sample surveys are now widely used and accepted as a means to provide statistical data for both social science research and administrative purposes. A well-designed sample survey provides an efficient and economical technique to gain knowledge about the survey population. The survey enables the researcher to gather data from a relatively large number of cases at a particular time and aggregate it into generalized statistics.

The survey is an important type of study. It must not be confused with the mere clerical routine of gathering and tabulating figures. It involves a clearly defined problem and definite objectives. It requires expert and imaginative planning, careful analysis and interpretation of the data

gathered, and logical and skillful reporting of the findings. (Best & Kahn, 79).

For this study the researcher chose to use descriptive research procedures using a mailed questionnaire in order to determine what actions school board members have taken, and will take, with regard to budget reductions and to study the relationship among these choices and selected school board, personal, and demographic variables.

#### Sample

A stratified random sample of 5,271 local school board members was identified from the list of 23,958 subscribers to The American School Board Journal which is published by the National School Board Association, the national professional organization for school board members in the United States. The subscriber list was examined and those subscribers who were not local school board members were deleted.

Sampling error is reduced both by sampling large numbers and by sampling within homogeneous populations. (Babbie). Stratified random sampling is a technique for obtaining a greater degree of representativeness and thus decreasing sampling error. For this study the list of subscribers was stratified into five geographical regions (Table 1), and a 22% sample within each section was

Table 1

Subscribers to The American School Board Journal By Region

Region	Subscribers	States	
NORTHEAST	5345	Connecticut Delaware District of Columbia Maine Maryland Massachusetts New Hampshire	New Jersey New York Pennsylvania Rhode Island Vermont
CENTRAL	8022	Illinois Indiana Iowa Kentucky Michigan	Minnesota Missouri Ohio Wisconsin
SOUTHERN	4214	Alabama Arkansas Florida Georgia Louisiana Mississippi	North Carolina South Carolina Tennessee Texas Virginia West Virginia
WESTERN	3277	Colorado Kansas Montana Nebraska New Mexico	North Dakota Oklahoma South Dakota Wyoming
PACIFIC	3100	Alaska Arizona California Hawaii Idaho	Nevada Oregon Utah Washington
Total	23,958		



identified (Table 2). Babbie states that within a nation, geographical stratification "increases representativeness in a broad range of attitudes as well as in social class and ethnicity" (1990, 86). This sample size is somewhat larger than the 20% chosen by Seaton (1991), the 15.5% used by Freeman (1990), the 12.6% identified by Yock (1989) and the 18% selected by Hatrick (1988) in previous studies in this series.

#### Instrumentation

The survey instrument (Appendix A) used in this study was designed to accomplish two purposes. The first purpose was to collect from school board members information about personal, attitudinal, and demographic factors related to this study. The second purpose was to gather information which was requested by The American School Board Journal will not reported as part of this study.

The survey instrument is divided into four sections. The ordering of the questions has been modified from that followed in previous surveys in this series. Babbie (1990) states that for self-administered questionnaires it is better to capture the interest of the respondent with the first set of questions. Placing dull, demographic questions first gives the appearance of a routine form and may decrease the potential respondent's motivation to respond.

Table 2

Population and Sample Size by Region

Region	Number of Subscribers in Population	22% Sample
Northeast	5345	1176
Central	8022	1765
Southern	4214	927
Western	3277	721
Pacific	3100	682
Total	23,958	5271

Section I of this survey seeks information about factors relating to budget decisions made by school board members. These factors include the process followed if cuts were made, sources of funding and funding cuts, specific cuts made, and preferences regarding future cuts. In Section II demographic information about the member's school district is requested. In Section III information about personal characteristics of the respondent is requested. In section IV information about the school boards on which the members serve is gathered.

The factors selected for study were derived from discussions with members of the researcher's dissertation committee and editors of The American School Board Journal. The classifications of areas of the budget to be included were adapted from United States Department of Education (1990), Hartman (1989), and Dodge (1981).

In order to validate the questionnaire the researcher field tested initial drafts of the instrument on convenience samples of 25 graduate students, collected and coded the data, ran a frequency analysis, and a Cronbach's Alpha test for reliability. In addition dissertation committee members and the chairman, editorial staff members of The American School Board Journal, and selected staff and school board members were asked to provide feedback to the following:

1. Are the directions of the questionnaire clearly stated and explained?

2. Are the questions of sufficient interest and appeal to motivate the respondent to complete the questionnaire?

3. Are the questions relevant to current educational concerns so as elicit a realistic and accurate response?

4. Are the questions clearly worded?

5. Do the questions anger or embarrass the respondent?

6. Are the questions too restrictive, limited, or narrow in scope?

7. Are the questions designed in such a way that, when taken as a whole, they will answer the basic research questions of the study?

Responses from those reviewing the drafts were analyzed for misinterpretations of any items and appropriate revisions were made as indicated. Particular attention was given to assuring that the questions were clear and straightforward by using Converse and Presser's (1986) points of simple language, common concepts, manageable tasks, and information widely available to school board members. In addition the questions were constructed for ease of coding for item analysis.

### Collection of Data

In accordance with the stratified random sampling technique previously described, local school board members were chosen to participate in this study. A questionnaire, an accompanying cover letter, and a preaddressed, postage-paid return envelope were mailed to each school board member in the sample on January 22, 1992. All returns included in the study were received by March 10, 1992..

Because of the requirement of The American School Board Journal that subscribers be assured anonymity when participating in studies there were no follow-up mailings to non-respondents. In order to check for non-response bias a comparison of first and second wave responses was undertaken. The end of the first wave responses (969) occurred by February 18, 1992 and the end of the second wave responses (125) by March 10, 1992. Differences between second wave responses and non-responses were expected to parallel differences between first and second wave responses. Cross-tabulation yielded a significant chi-square in 9 of 305 analyses. No systematic differences were evident.

The four preceding national studies of school board members in this series have achieved a return rate from 18 to 27 percent. After seven weeks a return rate of 21 percent was achieved in this study.

### Method of Analysis

Returned questionnaires were examined for completeness and correctness. Any questionnaires with one or more parts substantially incomplete were discarded.

The questionnaires were identified by numbers from 1 to 1096, the data coded, and entered on a computer terminal. The data were analyzed using the SAS packaged statistical analysis computer program. All questions were analyzed using frequency distributions, and responses to questions in Part I were analyzed using cross-tabulation procedures.

### Summary

The purpose of this chapter was to describe the methods used in this study, the development of the survey instrument, data collection procedures, and the statistical methods used in analyzing the data collected,

## Chapter 4

### RESULTS

The purpose of this chapter is to describe the data derived from the returned surveys. The first section presents a description of the respondents. The second section contains the findings related to each research question. The third section provides a summary of the chapter.

#### Description of the Sample

A description of the sample by geographic region is contained in Table 3. A stratified, random sample of 5271 school board member subscribers to The American School Board Journal was sent a mailed questionnaire on or about January 22, 1992. After seven weeks 1096 (21%) had been returned. In order to check for non-response bias a comparison of first wave responses (969 after four weeks) with second wave responses (128 after seven weeks) was made. Only 9 Of 305 analyses yielded a significant chi square. Because the three percent variation between waves was less than the five percent standard for significance set by the researcher, it was concluded that no meaningful differences between the waves were found. Of the surveys returned 37% were received from the Central region, 23,5% from the Northeast, 14.6% from the Southern region, 12%

Table 3

Distribution of Returned Surveys by Region

Region	<u>Mailed</u> N	<u>Returned</u> N	% Returned	% of Total Returned
Northeast	1176	257	21.9	23.5
Central	1765	406	23.0	37.0
Southern	927	160	17.3	14.6
Western	721	132	18.3	12.0
Pacific	682	127	18.6	11.6
Unidentified		14		1.3
Total	5271	1096	21.0	100



from the Western region and 11.6% from the Pacific region.

The distribution of returned surveys by community description and student enrollment is reported in Table 4. The majority of respondents indicated that their community was best described as suburban (30.3%) , rural (29.4%), or small town (29.4%) The highest response (52.9%) came from members in districts in the 1,000 to 4,999 enrollment range and the smallest response (2.6%) was received from members in districts of 25,000 or more.

#### Description of the Respondents

The personal data reported by respondents are detailed in Table 5. The majority were male (59.2%), white (92.6%), between the ages of 41 to 60 (67.4%), held four-year or advanced college degrees (69.9), earned incomes above \$40,000 (78.1%), were married (91.1%) and had children in public school (57.2%).

#### Findings

The first group of survey questions was directed toward those school board members who participated in the adoption of the system's current operating budget.

Table 4

Distribution of Returned Surveys by Community Description  
and Student Enrollment

Category	<u>Surveys Returned</u>	
	N	%
1. Community Description		
Urban	94	8.6
Suburban	332	30.3
Rural	322	29.4
Small town	285	26.0
Other	48	4.4
Unidentified	15	1.4
Total	1096	100
2. Student Enrollment		
Fewer than 1,000	179	16.3
1,000-4,999	580	52.9
5,000-9,999	172	15.7
10,000-24,999	123	11.2
25,000 or more	29	2.6
Unidentified	13	1.2
Total	1096	100

Table 5

Distribution of Personal Characteristics Identified by Respondents

Characteristics	Frequency N=1096	Percent
1. Gender		
Male	649	59.2
Female	430	39.2
No response	17	1.6
2. Ethnic designation		
Black	34	3.1
White	1015	92.6
Hispanic	16	1.5
American Indian	9	0.8
Asian	2	0.2
Other	5	0.5
No response	15	1.4
3. Age		
25 or under	2	0.2
26-35	41	3.7
36-40	154	14.1
41-50	512	46.7
51-60	227	20.7
Over 60	148	13.5
No response	12	1.1
4. Education attainment		
High school non-graduate	1	0.1
High school graduate	108	9.9
Post-high school training	207	18.9
Four-year college degree	360	32.8
Advanced college degree	407	37.1
No response	13	1.2
5. Income		
Less than \$40,000	199	18.2
\$40,000-79,999	539	49.2
\$80,000 +	317	28.9
No response	41	3.7
6. Married		
Yes	998	91.1
No	68	6.2
No response	30	2.7
7. Children in public school		
Yes	627	57.2
No	452	41.2
No response	17	1.6

Level of funding: Question 1 asked, "Did the amount of funding for your school system's operating budget increase, remain stable, or decrease?" An array of responses by geographic region is presented in Table 6. Overall, 41.1% of respondents indicated that funding had increased, 11.4% that it had remained stable, and 47.5% that it had decreased. The Northeast region had the highest percentage reporting decreased funding (60.4%) and the Southern region followed (58.1%). The Central region split with 46.2% reporting increased funding and 42.6% decreased funding as did the Pacific region with 44.6% reporting an increase and 41.3% a decrease. The Western region had the highest percentage of increased funding (48.1%).

Sources of funding reduction: Question 2 asked, "If funding decreased, where did the reduction occur?" Of those who reported a funding decrease 65.3% identified a reduction in state funding and 32% identified a combination of reduced federal, state, and local funding (Table 7).

Factors contributing to reduced revenue: Question 4 asked, "If funding decreased, which factors contributed to reduced revenue?" Of the four most frequently cited factors the state economy was identified by the highest percentage (87.9%) and lower state tax receipts was cited by 52.9%. Declining student population was a factor for 20%, and lower real estate values for 18.8% (Table 8).

Table 6

Cross Tabulation of Responses Regarding Funding Levels for  
Current Operating Budget with Geographic Region

Geographic Region	N	Increased	Remained Stable	Decreased
Northeast	240	32.9	6.7	60.4
Central	392	46.2	11.2	42.6
Southern	155	32.3	9.7	58.1
Western	129	48.1	20.2	31.8
Pacific	121	44.6	14.1	41.3
Total				
N	1037	426	118	493
%		41.1	11.4	47.5

Table 7

Distribution of Responses By Those Reporting Revenue  
Decrease Regarding Sources of Funding Reduction

Funding Source	Frequency	Percent
Federal	1	.2
State	323	65.3
Local	13	2.6
Federal/state	48	9.7
State/local	79	16.0
Federal/state/local	31	6.3

Table 8

Distribution of Responses of Those Reporting Revenue  
Decrease Regarding Factors Which Contributed to Reduction

Category	N	Frequency	Percent
Declining student population	465	93	20.0
Loss of local business	464	56	12.1
Unemployment	464	68	14.7
Lower real estate values	468	88	18.8
State economy	488	429	87.9
State tax receipts	476	252	52.9
Senior citizen tax relief	463	35	7.6
Business tax-relief incentives	465	52	11.2
Tax-exempt government property	466	42	9.0

N = # responding to item

N's exceed total responses due to multiple responses

% exceed 100% due to multiple responses

Reduction/elimination of previously funded programs:

Question 4 asked, "Were previously funded programs, services, or salaries reduced or eliminated as a result of funding shortages?". Previously funded programs were reduced or eliminated as a result of funding shortages by 56.3% of the boards. When responses were analyzed only for those reporting revenue decrease, the percentage rose to 67.6%.

Budget-cutting approach: In response to question 5 which asked what budget-cutting approach was used by the board, the greatest percentage of board members reported making specific line item cuts (85.5%). Broad category cuts were made by 21% and across-the-board percentage cuts were made by 14.2%. Multiple responses were possible.

Budget cutting criteria: Question 6 asked, "Did your board use a set of criteria or guidelines in considering cuts?" The majority of boards (67.4%) followed a set of criteria or guidelines in making cuts.



**Research question 1: What, if any, budget cuts have local school boards made in their current operating budgets?**

The budget items were organized by the categories of positions, programs/services, salaries and products. The complete findings are reported in Table 9.

Positions: Line items within the category of positions that were cut by 20% or more of boards were teacher aides (39.3%), teachers (29.1%), central office administrators (24.4%), school custodians (24.1%), and central office secretarial/ clerical positions (22.1%).

Programs/Services : Among the items included in the programs/services category those that were cut by 20% or more of boards were school board development (42.0%), extracurricular programs (31.7%), athletic programs (26.1%), training programs for the instructional staff (26.0%), and curriculum development (21.8%).

Salaries: Within the salaries category none of the line items were cut by 20% or more of boards. The highest percentage cut was in fringe benefits (14.6%) with all other items being cut less than 10%.

Products: All items within the products category were

Table 9

Distribution of Responses Regarding Actions Taken By Boards For the Current Operating Budget

Line Items	N	Cut	Not Cut	N/A
<u>Positions</u>				
1. Teachers(higher teacher/pupil ratio)	928	29.1	66.2	4.7
2. Teacher aides/ assistants	928	39.3	56.2	4.4
3. Guidance staff	906	14.2	80.1	5.6
4. Health workers	899	12.2	70.7	17.0
5. Psychologists	905	9.6	67.8	22.5
6. School board staff	908	7.2	61.2	31.6
7. Central office administrators	919	24.4	72.7	2.9
8. Central office secretarial/clerical	915	22.1	75.1	2.8
9. School building administrators	914	13.8	83.2	3.1
10. School secretarial/clerical	911	16.5	80.5	3.1
11. School custodians	914	24.1	73.5	2.4
12. Transportation staff	906	10.3	79.6	10.2
13. Food services staff	907	14.1	75.3	10.6
<u>Programs/Services</u>				
14. Regular education	904	18.1	80.2	1.7
15. Gifted/talented	910	18.2	75.7	6.0
16. Other special education	898	11.9	84.9	3.2
17. Adult education	901	10.2	56.4	33.4
18. Guidance (counseling, placement, records)	904	12.2	82.4	5.4
19. Psychological services (testing, therapy)	919	9.6	78.1	12.3
20. Hearing/speech services	900	3.9	86.4	9.7
21. Curriculum development	908	21.8	74.9	3.3
22. School board development (conventions, subscriptions, seminars)	918	42.0	54.8	3.2
23. School board legal services	907	9.6	87.2	3.2

Table 9 (Continued)  
 Distribution of Responses Regarding Actions Taken By Boards For the Current Operating Budget

Line Items	N	Cut	Not Cut	N/A
24. Community relations	911	11.3	74.8	13.9
25. Central business services	898	15.0	75.6	9.4
26. Research, planning, evaluation	905	18.0	67.3	14.7
27. Instructional staff training	913	26.0	71.7	2.3
28. Athletics	912	26.1	70.8	3.1
29. Other extracurricular programs	903	31.7	63.9	4.4
<b>Salaries</b>				
30. Teachers	916	5.9	91.9	2.2
31. Teacher aides, assistants	913	9.7	87.2	3.1
32. Central office administrators	913	7.2	89.9	2.8
33. Central secretarial/clerical	911	6.5	90.9	2.6
34. School building administrators	910	6.4	91.1	2.5
35. School secretarial/clerical	913	5.3	91.9	2.8
36. Other professional staff	896	9.4	85.7	4.9
37. Custodians, food service, transportation	905	9.5	88.0	2.5
38. Fringe benefits	903	14.6	82.9	2.4
<b>Products</b>				
39. Textbooks	907	24.8	73.9	1.3
40. Classroom supplies	918	45.4	53.5	1.1
41. Library materials	907	33.1	65.7	1.2
42. Pupil transportation vehicles	901	18.8	71.6	9.7
43. Food services equipment	899	13.6	76.9	9.6
44. School custodial supplies	900	29.7	68.7	1.7
45. Major maintenance items	908	35.8	61.7	2.5
46. Computer hardware/software	906	26.2	71.5	2.3

N = # responding to item  
 % may not total 100 due to rounding

cut by 20% or more of boards with the exception of pupil transportation vehicles (18.8%) and food services equipment (13.6%). Classroom supplies were cut by the highest percentage of any line item included on the survey (45.4%).

Researcher's Note: When the data were run using only those survey responses reporting a revenue decrease, a higher percentage cut was made across each line item.

**Research question 2: Do the budget cuts made by boards in the current operating budget differ as related to selected variables?**

The researcher set a standard of meaningful difference as a 20% deviation higher or lower than the expected response rate. The expected response rate was established using the distribution of total responses related to the variable. There were no meaningful differences related to the variables of gender, race, age, income, occupation, education, children in school, or whether the board member was elected or appointed. Differences were noted in relation to the demographic variables of region of the country, type of district, and student enrollment.

Positions: The five most frequently cut positions were cross tabulated by region (Table 10), type of district (Table 11), and enrollment (Table 12). The cuts in teacher aide positions were higher than expected in the Northeast,

in urban and suburban districts, and in districts enrolling 10,000 or more students, and lower than expected in the Western region and small towns. Cuts in teacher positions were higher than expected in the Northeast, in urban and suburban districts, and in districts enrolling 25,000 or more students, and lower than expected in the Western region and in small towns. Cuts in central office administrator positions were higher than expected in the Southern region, in urban and suburban districts and in districts enrolling more than 5,000 students. Cuts in custodian positions were higher than expected in the Northeast, in urban and suburban districts, and in districts enrolling 5,000 or more students, and less than expected in the Western, Central, and Pacific regions and in small towns. Cuts in central office secretarial/clerical staff positions were higher than expected in the Northeast and Southern regions, in urban and suburban districts, and in systems enrolling more than 5,000 students. The cuts were lower than expected in the Central and Western regions, in districts enrolling under 4,999 students, and in rural districts and small towns.

Table 10

Cross Tabulation of Responses Regarding Positions Most Frequently Cut by Geographic Region

Positions Cut	Geographic Regions				
	Northeast	Central	Southern	Western	Pacific
Teacher aides N=922 NC=359 %=38.9	31.5+	31.2	17.3	8.9-	11.1
Teachers N=922 NC=264 %=28.6	33.7+	37.9	13.3	6.0-	9.0-
Central office administrators N=919 NC=222 %=24.4	26.6	26.1-	27.5+	6.3-	13.5
Custodians N=908 NC=218 %=24.0	38.0+	28.9-	15.1	8.7-	9.1-
Central office secretarial/ clerical staff N=909 NC=200 %=22.0	37.0+	25.5-	20.5+	5.5-	11.5
# of responses by region	257	406	160	132	127
% of response by region	23.5	37.0	14.6	12.0	11.6

N = # responding to item

Note: Unidentified N=14 %=1.3

NC= # indicating item was cut

% = % of respondents indicating item was cut

+ = 20% higher than expected

- = 20% lower than expected

Table 11

Cross Tabulation of Positions Most Frequently Cut by Type of District

Positions Cut	<u>Type of District</u>				
	Urban	Suburban	Rural	Small Town	Other
Teacher aides N =920 NC=361 % =39.2	10.8+	36.6+	28.3	20.2-	4.2
Teachers N =920 NC=268 % =29.1	11.2+	36.9+	30.6	17.9-	3.6
Central office administrators N =911 NC=221 % =24.3	15.4+	42.0+	20.8-	16.3-	5.5
Custodians N =906 NC=24.0 % =24.0	14.8+	41.0+	24.0	16.6-	3.7
Central office secretarial clerical staff N =907 NC=199 % =22.0	14.1+	46.7+	18.1-	16.1-	5.0
# of responses by type	94	332	322	285	48
% of responses by type	8.6	30.3	29.4	26.0	4.4

N = # responding to item

Note: Unidentified N=15 %=1.4

NC= # indicating item was cut

% = % of respondents indicating item was cut

+ = 20% higher than expected

- = 20% lower than expected

Table 12

Cross Tabulation of Positions Most Frequently Cut By  
Student Enrollment

Positions Cut	Student Enrollment				
	<1,000	1,000- 4,999	5,000- 9,999	10,000- 24,999	>25,000
Teacher aides N =921 NC=361 % =39.2	11.6-	49.3	17.5	17.7+	3.9+
Teachers N =921 NC=267 % =29.0	15.7	51.3	16.5	12.0	4.5+
Central office administrators N =912 NC=223 % =24.5	4.0-	35.9-	26.5+	24.7+	9.4+
Custodians N =907 NC=217 % =24.0	10.6-	45.6	22.6+	16.6+	4.6+
Central office secretarial/ clerical staff N =908 NC=201 % =22.1	5.0-	40.3-	23.9+	23.9+	7.0+
# of responses by enrollment	179	580	172	123	29
% of responses by enrollment	16.3	52.9	15.7	11.2	2.6
N = # responding to item					Note: Unidentified n=13 %=1.4
NC= # indicating item was cut					
% = % of respondents indicating item was cut					
+ = 20% higher than expected					
- = 20% lower than expected					



Programs/Services: The five most frequently cut programs were cross tabulated by region (Table 13), type of district (Table 14), and student enrollment (Table 15). School board development cuts were higher than expected in the Northeast, in suburban districts, in those enrolling more than 10,000 students, and lower than expected in the Central and Western regions, and small towns. Cuts in extracurricular programs were higher than expected in the Northeast, in suburban districts, and in districts enrolling 10,000 to 24,999 students, and lower than expected in small towns. Cuts in athletic programs were higher than expected in the Northeast and suburban districts, in districts enrolling 10,000 to 24,999 students, and lower than expected in the Southern region. Cuts in instructional staff training programs were higher than expected in the Northeast and Southern regions, in suburban districts, in districts enrolling more than 5,000 students, and lower than expected in the Central and Western regions, in small towns, and in districts enrolling fewer than 1,000 students. Cuts in curriculum development programs were higher than expected in the Northeast and Southern regions, in urban and suburban districts, and in districts enrolling more than 5,000 students and lower than expected in the Central and Pacific regions, in small towns, and districts enrolling fewer than 1,000 students.

Table 13

Cross Tabulation of Programs Most Frequently Cut by Geographic Region

Programs Cut	<u>Geographic Regions</u>				
	Northeast	Central	Southern	Western	Pacific
School board development N = 912 NC= 381 % = 41.8	39.5+	27.8-	16.7	5.6-	10.5
Extra-curricular N = 897 NC= 281 % = 31.3	32.3+	31.0	13.9	11.7	11.0
Athletic N = 906 NC= 235 % = 26.0	35.7+	31.5	9.4-	11.0	12.3
Instructional staff training N = 907 NC= 232 % = 25.6	35.8+	24.1-	19.0+	7.3-	13.8
Curriculum development N = 902 NC= 194 % = 21.5	38.7+	25.3-	18.6+	5.7-	11.9
# of responses by region	257	406	160	132	127
% of responses by region	23.5	37.0	14.6	12.0	11.6

N = # responding to item

Note: Unidentified N=14 %=1.3

NC= # indicating item was cut

% = % of respondents indicating item was cut

+ = 20% higher than expected

- = 20% lower than expected

Table 14

Cross Tabulation of Programs Most Frequently Cut By Type of District

Programs Cut	Type of District				
	Urban	Suburban	Rural	Small town	Other
School board development N =910 NC=384 % =42.2	9.9	39.3+	27.0	18.8-	5.0
Extra- curricular N =895 NC=281 % =31.4	9.2	37.7+	27.0	20.3-	5.7
Athletic N =904 NC=235 % =26.0	10.2	36.6+	26.8	21.3	5.1
Instructional staff training N =905 NC=234 % =25.9	9.0	39.7+	26.5	19.7-	5.1
Curriculum development N =900 NC=195 % =21.7	12.8+	46.7+	20.0-	14.4-	6.2
# of responses by type	94	332	322	285	48
% of responses by type	8.6	30.3	29.4	26.0	4.4

N = # responding to item

Note: Unidentified N=15 %=1.4

NC= # indicating item was cut

% = % of respondents indicating item was cut

+ = 20% higher than expected

- = 20% lower than expected

Table 15

Cross Tabulation of Programs Most Frequently Cut By Student Enrollment

Program	Student Enrollment				
	<1,000	1,000-4,999	5,000-9,999	10,000-24,999	25,000+
School board development N =911 NC=383 % =42.0	14.1	48.3	17.2	16.5+	3.7+
Extra-curricular N =897 NC=282 % =31.4	14.9	51.4	15.6	15.6+	2.9
Athletic N =905 NC=235 % =26.0	14.0	49.4	18.3	15.3+	3.0
Instructional staff training N =906 NC=234 % =26.0	10.3-	50.4	19.2+	13.7+	6.4+
Curriculum development N =901 NC=197 % =21.9	6.1-	47.2	20.8+	18.8+	7.1+
# of responses by enrollment	179	580	172	123	29
% of responses by enrollment	16.3	52.9	15.7	11.2	2.6
N = # respondind to item	Note: Unidentified N=13 %=1.4				
NC= # indicating item was cut					
% = % of respondents indicating item was cut					
+ = 20% higher than expected					
- = 20% lower than expected					

Salaries: Within this category there were no meaningful differences related to the variables of type of district and student enrollment. Differences were noted related to the variable of region (Table 16). Cuts in fringe benefits were higher than expected in the Northeast region and lower than expected in the Pacific region. Cuts in teacher aide salaries were higher than expected in the Southern region, and lower than expected in the Central and Pacific regions. Cuts in salaries for custodian, food service and transportation staff were higher than expected in the Northeast and Southern regions, and lower than expected in the Western and Pacific regions. Cuts in salaries for other professional staff were higher than expected in the Southern region and lower than expected in the Central and Pacific regions.

Products: There were no meaningful differences related to the variable of student enrollment within this category. Differences were noted related to the variable of region (Table 17) and type of district (Table 18). Cuts in classroom supplies were higher than expected in the Northeast and lower than expected in the Western region. Cuts in major school building maintenance items were higher than expected in the Northeast and lower than expected in the Central region. Cuts in library materials were higher

Table 16

Cross Tabulation of Salaries Most Frequently Cut By  
Geographic Region

Salaries Cut	<u>Geographic Regions</u>				
	Northeast	Central	Southern	Western	Pacific
Fringe benefits N =897 NC=130 % =14.5	29.2+	39.2	14.6	13.0	3.9-
Teacher aides N =907 NC= 87 % =9.6	27.6	27.6-	25.3+	12.6	6.9-
Custodians, food service transportation N =899 NC=86 % =9.6	33.7+	33.7	18.6+	7.0-	7.0-
Other professional staff N =890 NC=81 % =9.1	27.2	28.4-	24.7+	12.4	7.4-
# of responses by region	257	406	160	132	127
% of responses by region	23.5	37.0	14.6	12.0	11.6
N = # responding to item		Note: Unidentified N=14 %=1.3			
NC= # indicating item was cut					
% = % of respondents indicating item was cut					
+ = 20% higher than expected					
- = 20% lower than expected					

Table 17

Cross Tabulation of Products Most Frequently Cut by Geographic Region

Products Cut	<u>Geographic Regions</u>				
	Northeast	Central	Southern	Western	Pacific
Classroom supplies N =912 NC=412 % =45.2	35.2+	31.3	13.4	9.5-	10.7
Major school building maintenance N =902 NC=319 % =35.4	34.5+	26.3-	16.9	11.3	11.0
Library materials N =901 NC=296 % =32.9	38.5+	27.0-	16.2	9.5-	8.8-
Custodial supplies N =894 NC=261 % =29.2	38.7+	24.9-	15.3	11.1	10.0
# of responses by region	257	406	160	132	127
% of responses by region	23.5	37.0	14.6	12.0	11.6

N = # responding to item  
 NC= # indicating item was cut  
 % = % of respondents indicating item was cut  
 + = 20% higher than expected  
 - = 20% lower than expected

Note: Unidentified N=14 %=1.3

Table 18

Cross Tabulation of Products Most Frequently Cut By Type of District

Products cut	Type of District				
	Urban	Suburban	Rural	Small Town	Other
Classroom supplies N =912 NC=416 % =45.6	8.1	34.6	30.9	21.9	5.1
Major school building maintenance items N =902 NC=322 % =35.7	9.6	31.0	30.4	24.2	4.7
Library materials N =901 NC=299 % =33.2	9.7	38.1+	28.8	18.7-	4.7
Custodial supplies N =894 NC=265 % =29.6	10.9+	35.5	30.9	16.2-	6.4
# of response by type	94	332	322	285	48
% of responses by type	8.6	30.3	29.4	26.0	4.4
N = # responding to item	Note: Unidentified N=15 %=1.4				
NC= # indicating item was cut					
% = % of respondents indicating item was cut					
+ = 20% higher than expected					
- + 20% lower than expected					



than expected in the Northeast and suburban districts, and lower than expected in the Central, Western, and Pacific areas. Cuts in custodial supplies were higher than expected in the Northeast and urban districts, and lower than expected in the Central region and in small towns.

Likelihood of future budget cuts: Using a forced choice Likert scale, survey question 8 sought information from all respondents regarding the likelihood that they would make budget cuts among the presented line items. The responses were collapsed into two categories, unlikely and likely. Using the likely column percentages, the researcher established likely cuts within each category as the three items that received the highest percentages. Unlikely cuts within each category were established as the three items that received the lowest percentages. All responses are reported in Table 19.

Within the category of positions those identified as likely for cuts were teaching assistants/aides (52.4%), teachers (35.0%) and central office secretarial/clerical staff (33.5%). Those positions identified as unlikely to be cut were school building administrators (23.6%), transportation staff (21.3%), and guidance staff (25.1%).

Among the items listed in the program category those identified as likely cuts were school board development

Table 19

Distribution of Board Member Responses Regarding Likelihood Of Cuts In The Next Operating

Budget

Line items	N	% Unlikely	% Likely
<u>Positions</u>			
1. Teachers(higher teacher pupil ratio)	1057	65.0	35.0
2. Teaching aides/assistants	1063	47.4	52.4
3. Guidance staff	1063	74.6	25.1
4. Health workers	1025	69.7	28.2
5. Psychologists	1028	65.6	31.4
6. School board staff	1003	60.6	31.0
7. Central office administrators	1064	66.0	33.4
8. Central office secretarial/clerical staff	1066	66.1	33.5
9. School building administrators	1060	75.8	23.6
10. School secretarial/clerical staff	1058	71.3	28.2
11. School custodians	1053	72.2	27.6
12. Transportation staff	1035	75.2	21.3
13. Food services staff	1042	70.7	26.8
<u>Programs/Services</u>			
14. Regular education	1066	84.1	15.9
15. Gifted/talented	1056	65.7	33.2
16. Other special education	1061	79.6	20.3
17. Adult education	984	44.9	48.1
18. Guidance (counseling, placement, records)	1062	73.0	26.6
19. Psychological services (testing, therapy)	1042	72.6	26.6
20. Hearing/speech services	1042	82.0	17.1
21. Curriculum development	1045	67.7	32.1
22. School board development (conventions, subscriptions, seminars)	1054	23.9	75.7
23. School board legal services	1051	64.6	35.1
24. Community relations	1039	65.9	32.5

Table 19 (Continued)

## Distribution of Board Member Responses Regarding Likelihood of Cuts In Next Operating Budget

Line Items	N	% Unlikely	% Likely
25. Central business services	1040	60.4	38.7
26. Research, planning, evaluation	1038	56.3	42.8
27. Instructional staff training	1054	64.2	35.7
28. Athletics	1059	36.3	63.7
29. Other extra-curricular programs	1049	31.6	68.3
<u>Salaries</u>			
30. Teachers	1053	71.7	27.6
31. Teacher aides, assistants	1049	61.6	37.6
32. Central office administrators	1050	59.1	40.2
33. Central office secretarial/ clerical staff	1045	66.8	32.7
34. School building administrators	1046	63.5	36.5
35. School building secretarial/ clerical staff	1046	68.5	30.7
36. Other professional staff	1042	57.4	41.7
37. Custodians, food service, transportation	1039	67.5	31.6
38. Fringe benefits	1056	43.6	56.0
<u>Products</u>			
39. Textbooks	1058	73.4	26.5
40. Classroom supplies	1061	60.4	39.6
41. Library materials	1057	61.0	39.0
42. Pupil transportation vehicles	1030	58.2	38.8
43. Food services equipment	1036	53.0	45.1
44. School building custodial supplies	1055	62.7	37.3
45. Major school building maintenance	1051	53.9	46.1
46. Computer hardware/software	1054	56.4	43.6
N = # responding to item			
% may total less than 100% because some items were not applicable to all budgets			

(75.7%), extracurricular activities (68.3%), and athletic programs (63.4%). Those programs which were unlikely to be cut were regular education (15.91%), hearing and speech services (17.1%), and special education (20.3%).

Likely cuts in the salaries category were fringe benefits (56%), other professional staff (41.7%), and central office administration (40.2%). Unlikely salary cuts were teachers (27.6%), school secretarial/clerical positions (30.7%), and food, transportation, and custodial staff (31.6%).

Products identified as likely for cuts were major maintenance items (46.1%), food services equipment (45.1%), and computer hardware or software (43.6%). Products unlikely to be cut were textbooks (26.5%), custodial supplies (39.6%), and library materials (39.0%).

**Research question 3: If budget cuts are required in the next budget, what items will board members be most likely to cut?.**

In question 9 respondents were asked to select from the complete list of 46 line items in question 8 the three they would be most likely to cut. The four items that were identified most often by the 1000 who responded to this question were school board development (259), athletic programs (231), other extracurricular programs (189), and fringe benefits (174).

**Research question 4: Do the items identified as likely cuts differ as related to selected variables?**

The researcher set a standard of meaningful difference as a 20% deviation higher or lower than the expected response rate. The expected response rate was established using the likely total percentage response from question 8 for each of the four items . No meaningful differences were noted related to the variables of gender, age, education, race, income, occupation, children in school, and how board members were selected, type of district, or student enrollment. Respondents from the Southern region were less likely than expected to cut fringe benefits (Table 20).

**Research question 5: If budget cuts are required in the next budget what items will board members be least likely to cut?**

The second part of question 9 asked respondents to select from the complete list of 46 line items in question 8 the three they would be least likely to cut. The four items identified most often by the 981 respondents as least likely to be cut were regular education (446), teacher positions (386), teacher salaries (320), and textbooks (202).

Table 20

Cross Tabulation of Budget Items Identified As Most Likely  
Cuts By Geographic Region

Budget Item	Geographic Regions					Total
	Northeast	Central	Southern % Likely Cut	Western	Pacific	
School board development N=1054	74.2	78.3	76.8	71.0	74.4	75.8
Extra curricular programs N=1049	66.5	68.4	63.5	71.2	74.0	68.3
Athletic programs N=1059	62.3	65.2	55.3	63.6	68.6	63.3
Fringe benefits N=1056	58.3	59.3	43.0-	56.8	53.7	55.8

N = # responding to item

- = 20% lower than expected

**Research question 6: Do the items identified as least likely to be cut differ as related to selected variables?**

Using the same standard as in research question 4 no meaningful differences were noted with the variables of gender, age, education, race, income, occupation, children in school, how board members were selected, or student enrollment.

Differences were noted when analyzing the data by region (Table 21). Respondents from the Northeast and Southern regions were more likely than expected to cut regular education and teacher salaries while those from the Southern, Western, and Pacific regions were less likely than expected to do so. Teacher positions and textbooks were less likely than expected to be cut in the Western, Pacific, and Southern regions. Textbooks were more likely than expected to be cut in the Central region.

Other cost-cutting strategies: In response to the question, "Is your board considering any of the following cost-cutting strategies?", 41.3% of the respondents have considered contract services . Employee furloughs have been considered by 12.7%, a shorter school day by 2.1%, and shorter school year by 3.3% (Table 22).

Table 21

Cross Tabulation of Budget Items Identified As Least Likely  
Cuts By Geographic Region

Budget Items	<u>Geographic Regions</u>					Total
	Northeast	Central % Likely	Southern Cut	Western	Pacific	
Regular education N=1061	32.1+	39.9+	10.1-	7.1-	10.7-	15.9
Teacher positions N=1053	32.4	41.6	6.5-	9.1-	10.3-	35.0
Teacher salaries N=1057	33.6+	41.9+	3.5-	11.8-	9.4-	27.9
Textbooks N=1058	24.1	42.5+	10.4-	9.4-	13.7-	26.4

N = # responding to item  
+ = 20% higher than expected  
- = 20% lower than expected



Table 22

Distribution of Responses Regarding Consideration of Other  
Cost-Cutting Strategies

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Strategy	N	Yes	No
Contract services	1028	41.3	58.7
Employee furloughs	1022	12.7	87.3
Shorter school year	1012	3.3	96.7
Shorter school day	1010	2.1	97.9

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N= number responding to item

N's exceed total responses due to multiple response

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Influencers on board members' budget decisions:

Using a forced choice Likert scale board members were asked in question 11 to indicate the level of influence of selected individuals and groups on their budget decisions. The data were collapsed into two categories of low influence and high influence (Table 23). The researcher set a standard for high influence as a score above 70% and for low influence as a score below 30%. Those who were considered most influential were the superintendent (92.8%), other administrators (79.9%), fellow school board members (73.3%), and parent groups (70.4%). Those who were considered least influential were friends/family (28.5%), business organizations (23.4%), other public officials (19.9%), special interest groups (10.4%), other labor unions (9.0%), and vendors (1.8%).

Final budget approval: Respondents were asked in question 12, "Who has final approval of your adopted school budget?". The results were school board (78.7%), other governing body (6.3%), and voters (15%). Voters have final approval in 23.7% of the suburban districts and in 4.3% of urban districts (Table 23).

Table 23

Distribution of Responses Related to Degree of Influence on  
Board Members' Budget Decisions By Groups and Individuals

Category	N	Low Influence %	High Influence
Superintendent	1067	7.2	92.8
Other administrators	1069	20.1	79.9
Fellow school board members	1069	26.7	73.3
Parent groups	1066	29.6	70.4
Students	1067	44.0	56.0
Taxpayer groups	1067	49.9	50.1
Teacher unions/ associations	1067	63.7	36.3
Friends/family	1065	71.5	28.5
Business organizations	1062	76.6	23.4
Other public officials	1064	80.1	19.9
Special interest groups	1062	89.6	10.4
Other labor unions	1057	91.0	9.0
Vendors	1067	98.2	1.8

N = number responding to item

N's exceed total responses due to multiple responses

Table 24

Cross Tabulation of Who Has Final Approval of the Budget by  
Type of District

Type of District	Final Approval			Voters
	School Board	Other Governing Body %		
Urban	86.0	9.7	4.3	
Suburban	71.2	5.1	23.6	
Rural	80.7	6.0	13.3	
Small town	83.3	5.7	11.0	
Other	75.0	12.5	12.5	
Total	78.7	6.3	15.0	

## Summary

This chapter has presented a description of the school board members who responded to the survey according to selected demographic, personal, and school board characteristics. The second section describes the findings of this study for the research questions. The results identified the budget items boards have cut in their current operating budgets; differences among the most frequent cuts related to region of the country, type of district, and student enrollment; the most likely and least likely items to be cut if further retrenchment is required; and differences among those choices related to region of the country. Included also are the data derived from other relevant questions included in the survey.

## Chapter 5

### SUMMARY, CONCLUSIONS, AND RECOMMENDATIONS

The purpose of this chapter is to present a summary of the study that was conducted. Included will be a review of the purpose of the study, a restatement of the research questions, a summary of the related literature, a recapitulation of the research method used by the researcher, and a synthesis of the findings and conclusions derived from the data analysis. Recommendations for further research will also be made.

#### Summary

##### Purpose of the Study

The purpose of this study was to collect and analyze information from a sample of school board members in order to describe what, if any, budget cuts have been made by local school boards in their current budgets and to ascertain what choices school board members would make if cuts were needed in their next year's budgets.

Members of local school boards in the United States are the key decision makers in the allocation of the nation's multibillion dollar investment in public elementary and secondary education. While operating within a highly decentralized education system, local boards have

been buffeted by increasing pressures from numerous national and state entities for meeting an expanding list of societal needs.

The nation's governors, jolted by America's diminished competitiveness in the global marketplace, formed a powerful coalition in 1986 to press for improved school outcomes and better prepared workers. Subsequent to the release of the report Time for Results, the governors have been a catalyst for numerous state initiatives such as increased graduation requirements and higher teacher salaries that have had a direct impact on local district budgets. The national political focus on education continued as President George Bush convened the National Governors' Association for a 1989 "education summit." Together they issued a communique outlining six national education goals to be achieved by the year 2000. However, the federal proportion of education funding has yet to be increased in order to provide a catalyst for this effort.

In addition to demands for preparing students to compete in the workplace, schools have also been the public institution called upon to solve many of society's problems. Schools are being asked to devote more hours to academic studies while also educating students about an expanding list of issues such as drugs, AIDS, and other health concerns, dealing with students' personal and family

problems which interfere with learning, and addressing the needs of an increasingly diverse student population.

Although the pressure continues for schools to meet all of these needs, the resources to provide the financial support have not consistently kept pace. Funding for public schools comes predominantly from state and local revenue sources, many of which have been affected negatively by economic recession. Various state governments report the tightest financial bind in a decade while some local governments have also been squeezed by decreased property tax revenue which provides, for most districts, the major portion of local school funding.

Thus many local school boards are caught in the crunch between heightened demands for school improvement and lowered revenue with which to carry out the mandate.

#### Research Questions Restated

1. What, if any, budget cuts have local school boards made in their current operating budgets?
2. Do the budget cuts made in current operating budgets differ as related to selected variables?
3. If budget cuts are required in the next budget, what are the areas board members will be most likely to cut?
4. Do the items identified as likely cuts differ as related to selected variables?



5. If budget cuts are required in the next budget, what items will board members be least likely to cut?

6. Do the items identified as unlikely cuts differ as related to selected variables?

### Summary of Related Literature

The literature review focused on the political and economic pressures being placed on public education in order to describe the environment in which school board members are making budget decisions.

Notwithstanding the myth of local control of schools, the trend over the past century has been toward greater state authority and direction (Wirt, 1977). This is most evident in the dominant educational role being assumed by the nation's governors. Responding to the plethora of reform reports of the early 1980's as well as the increasing economic competition from other nations, the National Governors' Association issued its 1986 report, Time for Results. This report, while recognizing the diversity within the nation's schools, nevertheless detailed certain components which the governors believed would contribute to improved outcomes from public schools in general. Among them were recommendations for improved salaries, career ladders, and merit pay for teachers. Such personnel costs comprise the largest proportion of a school district's budget. Many states were able to increase

education funding when the economy was strong, most frequently applying the dollars toward raising teacher salaries (Nathan, 1986). However, as state revenues began to shrink as a consequence of the recession in the late '80's, retrenchment in state education budgets began.

The national political focus on public education continued with the 1989 education summit convened by President George Bush meeting with the governors. Together they issued a national agenda of performance goals to be achieved by the year 2000 aimed at making the nation internationally competitive . The goals are ambitious, the rhetoric is stirring and strong, but increased appropriations to support implementation of the agenda have yet to be made.

Pressures from constituencies within the local community are also being brought to bear on board members. Schools are being called upon to meet the educational, social, and physical needs of an increasingly diverse student population. At the same time that the aging of the population has resulted in a reduction in the schools' natural constituency of parents, other public social service agencies as well as advocates for rebuilding the infrastructure, improving public transportation, protecting the environment, and supporting senior citizens are competing for an increased share of public dollars.

(Hodgkinson, 1985; Quindry & Fox, 1983; Tyack & Hansot, 1982; Webb and Mueller, 1984; Wirt & Kirst, 1989)

Finding the dollars to fund these requirements in 1992 has become more difficult as the nation has endured an economic recession. The recessionary effects were felt first by the states, and newspaper headlines from across the nation chronicle economic hard times. (Celis, 1991; Ifill, 1991; Rowland, 1991) And because one of the largest portions of any state's budget is education, the shortfall in many states has resulted in decreased dollars for public education. (Banks, 1991; Marquand, 1989; National Association of State Budget Officers, 1991; Ornstein, 1990; Phipho, 1991)

While the major recessionary impact was first evident in the state share of education funding, local revenue has also been affected by stagnant or falling real property values and a sluggish business environment (Hey, 1991). Localities rely overwhelmingly on real property taxes from homeowners and businesses to fund education (Johns et al., 1983) and many local school boards are thus experiencing another wave of revenue reductions.

Economists and planners recognize the importance of human capital formation to the future prosperity of the nation (Johnston & Packer, 1987), but it is difficult to convey the concept that dollars now invested in education enhance human capital formation and ultimately will result

in more dollars in the public purse (Cohn & Geske, 1990). Because the benefits of education spending are less immediately visible than that for some other public programs, school boards are at a disadvantage in making their case and school funding consequently becomes vulnerable to budget cuts (Quindry & Fox, 1983).

### Method

Descriptive research survey and analysis techniques were employed in this study. A 22% stratified, random sample of 5,271 school board member subscribers to The American School Board Journal was surveyed by means of a mailed questionnaire. The survey instrument sought information about budget decisions made by school boards and members, as well as identification of personal, demographic and school board characteristics pertinent to the study. After seven weeks responses from 1,096 school board members, a 21% return, had been received. These data were analyzed using frequency and cross tabulation procedures. In order to check for non-response bias a comparison of first and second wave responses was made, and no meaningful differences between the waves were found.

### Findings

The school board members who responded to the survey were described by gender, age, race, educational

attainment, income, whether they are married, have children in school, and have been elected or appointed to the board. The majority were male, white, between the ages of 41 and 60, held four-year or advanced college degrees, earned incomes above \$40,000, had children in public school, and had been elected to the school board. Demographic data related to region of the country, school district enrollment, and type of community were also collected.

The first questions of the survey related to the economic conditions that affect funding of public school budgets. Overall, 41.1% indicated that funding had increased, 11.4% that it had remained stable, and 47.5% that it had decreased. The Northeast region had the highest percentage reporting decreased funding (60.4%) and the Western region had the highest percentage reporting increased funding (48.1%). Of those reporting reduced revenue a majority (65.3%) identified a reduction in state funding as the major factor in the decrease. As a result of funding shortages, 56.3% of the boards reduced or eliminated previously funded programs. Most boards made specific line item cuts and followed a set of criteria or guidelines in making their decisions.

Board members were asked to indicate what decisions the board had made in adopting the current operating budget. Budget items included in the survey were organized by the categories of positions, programs/services,

salaries, and products. Within the category of positions the most frequent cuts were made in teacher aides, teachers, central office administrators, custodians, and central office secretarial/ clerical positions. Among programs/services the items most frequently cut were school board development, extra-curricular programs, athletic programs, training programs for the instructional staff, and curriculum development. Within the salary category cuts were much less frequent with the highest percentage cut being in fringe benefits (14.6%). The most frequent products cut were classroom supplies, major school building maintenance items, library materials, and custodial supplies.

Meaningful differences about these decisions were noted when they were examined in relation to the region of the country, student enrollment, and type of community. Within the positions categories cuts were higher than expected in Northeast, in urban and suburban districts, and in systems with more than 10,000 students. Position cuts were lower than expected in the Western region, in small towns, and in districts with fewer than 1,000 students. Within the programs/services category cuts were higher than expected in the Northeast region, in suburban districts, and in districts with more than 10,000 students. The program cuts were lower than expected in the Western region and in small towns. Within the salaries category the cuts

were higher than expected in the Southern and Northeast regions and lower than expected in the Pacific region. Product cuts were higher than expected in the Northeast and lower than expected in the Central region.

If further cuts are required in the next budget cycle the items that board members will be most likely to cut are school board development, athletic programs, other extra-curricular programs, and fringe benefits. Fringe benefits are somewhat less likely to be cut in the Southern region than in the rest of the country.

Those items identified by board members as least likely to be cut are regular education, teacher positions, teacher salaries, and textbooks. Regular education programs, and teacher positions are somewhat more vulnerable to cuts in the Central and Northeast than in other regions.

Other cost cutting strategies considered by boards were contract services (41.3%), and employee furloughs (12.7%). Shortening the school day or school year has been considered by only minimal percentages of boards.

In making their budget decisions board members are most highly influenced by the superintendent, other administrators, fellow school board members, and parent groups. Friends and family, business groups, special interest groups, and other public officials have little

influence. The majority of school boards (78.7%) have final approval of the adopted budget.

### Conclusions

The results of this study clearly demonstrate the differential effects that the economic recession is having on school board budgets in this country. Boards in the Northeast have been hit hardest by reduced revenue and those in the Western region have been hurt the least. A dichotomy exists in the Central and Pacific regions with approximately equal percentages in each area reporting increased and decreased revenue. A decrease of state funding is cited by the majority as the major factor in funding shortages and this in turn has led over half of the boards to reduce previously funded programs and services.

When members were asked about the current operating budget and what specific cuts among various line items their boards had made, regional differences were evident. Among the positions, programs/services, and products categories cuts tended to be deeper in the Northeast and less frequent in the Western and Pacific regions. Cuts were more pronounced in urban and suburban districts and those with more than 10,000 students. Because districts with



large student enrollments are located in urban/suburban areas there is overlap among these variables. Similarly districts with smaller enrollments tend to be in rural areas or small towns. Particularly with regard to positions there is probably less flexibility to make cuts in smaller districts. Urban and suburban districts may also be more vulnerable to a decline in local funding if real estate values have fallen as a consequence of recession.

In discussing the specific cuts that boards have made in current operating budgets it must be pointed out that this is a snapshot of a single budget cycle. The flexibility to make decisions within categories may have been limited by decisions made in preceding budgets. Salaries are often set as a result of collective bargaining or contract negotiations and are consequently not easily modified. Boards may also be striving to protect the gains in teacher salaries that had been achieved during the latter 1980's.

It is interesting to note that among the positions and services less frequently cut are those related to health and psychological services and guidance. This tends to support the notion that schools are striving to meet a variety of student needs that may not be related directly to its primary mission of educating the student in the classroom.

Board members seem to be promising more of the same. Items vulnerable to cuts in the next budget are school board development, athletic and extracurricular programs and fringe benefits. There may be some political ramifications of these choices. Board members take the first "hit" followed by popular athletic and extracurricular programs. Faced with the latter possibilities communities may be galvanized to lobby for increased funding for public schools. Fringe benefits, which account for about one-third of all personnel costs, is the item which could make the most substantial impact on a budget.

Despite the difficulties posed by variable economic conditions board members appear committed to protecting the core of the academic program. This is evidenced by their identification of regular education, teacher positions and salaries, and textbooks as the items they are unlikely to cut. There is, however, a paradox in that board members have already cut teacher positions, yet also identify teacher positions as a protected category. Perhaps this means that board members do not always make decisions on the basis of their individual preferences.

In making their budget decisions board members place a high degree of confidence in the opinions of the people most familiar with schools. Board members value the professional expertise of the superintendent . They also

respect the opinions of other professional administrators, fellow school board members, and parent groups. It is noteworthy that business organizations and other elected officials have a low degree of influence. In light of the prominent role being played by the governors and business at the national and state levels, this result points to a chasm between these groups and the place where the decisions are made, at the grass roots, by the local school board.

#### Recommendations for Further Study

Based upon the results and conclusions of this study related to the budget process and retrenchment decisions made by school board members, the following recommendations for further study are made.

The majority of respondents in this survey indicated that a set of criteria or guidelines were used in making their budget decisions. It would be informative to undertake a study of those guidelines and criteria in order to better understand the budget process and the key decision points for board members.

Board members also found some individuals and groups very influential in their decision making and others not influential at all. As a study in policy making it would be interesting to explore what makes some influencers credible

and others less so, and to determine if these vary depending upon the policy issue being decided.

As economic conditions improve boards will eventually have the opportunity to restore cuts or reallocate funding. It would be informative at that point to again survey school board members to determine if their priorities are the same or if they have shifted .

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Appendix A

THE AMERICAN  
**SCHOOL  
BOARD**  
JOURNAL

1680 DUKE STREET  
ALEXANDRIA, VA 22304  
(703) 838-6722

Dear Subscriber,

Please take a minute to help your magazine, The American SCHOOL BOARD Journal, promote a greater understanding and deeper appreciation of school board service. Help us by completing the enclosed survey. At the same time, you'll be making your views count among other school leaders across North America.

For the last 15 years, SCHOOL BOARD and Virginia Tech have questioned school board members about their concerns and the special challenges they face.

Here's your chance to stand up and be counted, too.

The survey results, which will be featured in our January 1993 issue, traditionally are publicized from coast to coast by the national wire services and local news media. This exposure helps promote the importance of board service and calls attention to the achievements and concerns of local school leaders such as yourself.

Your participation is crucial for the survey to be valid. Only a select number of board members were chosen to receive this survey, so it's essential that you take a minute now to complete it.

A postage-paid, self addressed envelope is included for your convenience. All individual responses will be kept confidential.

I know you're busy, so I'm especially grateful for your time and cooperation.

Cordially,

*Gregg W. Downey*  
Gregg W. Downey  
Editor-in-chief

P.S. To be eligible to win a five-book treasury of ideas and advice, affix your mailing label to the postage-paid envelope when you mail your survey back. After the surveys are removed, we'll pick five envelopes at random. The lucky winners will receive the following value packed books: *Becoming a Better Board Member*, *School Boards and the Ballot Box*, *Board Member Planner*, *Time For Curriculum*, and *School Board Success: Right From The Start*.

## 1992 NATIONAL SURVEY OF SCHOOL BOARD MEMBERS

### SCHOOL BOARD BUDGET

Directions: The following questions refer to your school system's current operating budget and decisions made in its adoption. (If you were not a board member when it was adopted, proceed to question #8.)

	Cut	Not cut	N/A	
1. Did the amount of funding for your school system's operating budget (check one) (a) ___ increase (b) ___ remain stable (c) ___ decrease?	___	___	___	<b>Positions (cont.)</b>
	___	___	___	(6) School board staff
	___	___	___	(7) Central office administrators
	___	___	___	(8) Central office secretarial, clerical
2. If funding decreased, where did the reduction occur? (Check all that apply.) (a) ___ federal funds (b) ___ state funds (c) ___ local funds	___	___	___	(9) School building administrators
	___	___	___	(10) School building secretarial, clerical
3. If funding decreased, which of the following contributed to reduced revenue? (Check all that apply.) (a) ___ declining student population (b) ___ loss of local businesses (c) ___ loss of jobs/local unemployment (d) ___ lower/stagnant real estate values (e) ___ state economy (f) ___ state tax receipts (g) ___ property tax relief for senior citizens (h) ___ tax-relief incentives for major business and industry in local community (i) ___ tax-exempt government property	___	___	___	(11) School custodians
	___	___	___	(12) Pupil transportation staff
	___	___	___	(13) Food services staff
	___	___	___	<b>Programs/Services</b>
	___	___	___	(14) Regular education
	___	___	___	(15) Gifted/talented education
	___	___	___	(16) Other special education
	___	___	___	(17) Adult/continuing education
	___	___	___	(18) Guidance programs (counseling, placement, records)
	___	___	___	(19) Psychological services (testing, therapy)
4. Were previously funded programs, services, or salaries reduced or eliminated as a result of funding shortages? (a) ___ yes (b) ___ no	___	___	___	(20) Hearing/speech services
	___	___	___	(21) Curriculum development
	___	___	___	(22) School board development (conventions, subscriptions, seminars)
5. What budget-cutting approach did your board follow? (Check all that apply.) (a) ___ across-the-board percentage cut (b) ___ broad category cuts (c) ___ specific line-item cuts	___	___	___	(23) School board legal services
	___	___	___	(24) Community relations
	___	___	___	(25) Central business services
	___	___	___	(26) Research, planning, evaluation
6. Did your board use a set of criteria or guidelines in considering cuts? (a) ___ yes (b) ___ no	___	___	___	(27) Training programs for instructional staff
	___	___	___	(28) Athletic programs
	___	___	___	(29) Other extracurricular programs
7. From the following list of budget items, please check the action taken by your board for its current operating budget. (N/A indicates that item is not applicable to your budget.)	___	___	___	<b>Salaries</b>
Cut    Not    N/A	___	___	___	(30) Teachers
cut	___	___	___	(31) Teaching assistants or aides
<b>Positions</b>	___	___	___	(32) Central office administrators
___ ___ ___ (1) Teachers (higher pupil/teacher ratio)	___	___	___	(33) Central office secretarial, clerical
___ ___ ___ (2) Teaching assistants or aides	___	___	___	(34) School building administrators
___ ___ ___ (3) Guidance staff	___	___	___	(35) School building secretarial, clerical
___ ___ ___ (4) Health workers	___	___	___	
___ ___ ___ (5) Psychologists	___	___	___	

7. Continued

Cut	Not cut	N/A	
_____	_____	_____	<b>Salaries (cont)</b>
_____	_____	_____	(36) Other professional personnel
_____	_____	_____	(37) Custodians, food service, transportation workers
_____	_____	_____	(38) Fringe benefits
_____	_____	_____	<b>Products</b>
_____	_____	_____	(39) Textbooks
_____	_____	_____	(40) Classroom supplies
_____	_____	_____	(41) Library materials
_____	_____	_____	(42) Pupil transportation vehicles
_____	_____	_____	(43) Food services equipment
_____	_____	_____	(44) School building custodial supplies
_____	_____	_____	(45) Major school-building maintenance items
_____	_____	_____	(46) Computer hardware or software

8. For the following question, assume that you will be required to make cuts in your school system's upcoming operating budget. Using the following scale, circle the number which describes the likelihood that you would vote to cut each item:

- 1=very unlikely
- 2=unlikely
- 3=likely
- 4=very likely

	Very Unlikely			Very Likely
<b>Positions</b>				
(1) Teachers (higher pupil/teacher ratio)	1	2	3	4
(2) Teaching assistants or aides	1	2	3	4
(3) Guidance staff	1	2	3	4
(4) Health workers	1	2	3	4
(5) Psychologists	1	2	3	4
(6) School board staff	1	2	3	4
(7) Central office administrators	1	2	3	4
(8) Central office secretarial, clerical	1	2	3	4
(9) School building administrators	1	2	3	4
(10) School building secretarial, clerical	1	2	3	4
(11) School custodians	1	2	3	4
(12) Pupil transportation staff	1	2	3	4
(13) Food services staff	1	2	3	4

	Very Unlikely			Very Likely
<b>Program/Services</b>				
(14) Regular education	1	2	3	4
(15) Gifted/talented education	1	2	3	4
(16) Other special education	1	2	3	4
(17) Adult/continuing education	1	2	3	4
(18) Guidance programs (counseling, placement, records)	1	2	3	4

	Very Unlikely			Very Likely
<b>Program/Services (cont.)</b>				
(19) Psychological services (testing, therapy)	1	2	3	4
(20) Hearing/speech services	1	2	3	4
(21) Curriculum development	1	2	3	4
(22) School board development (conventions, subscriptions, seminars)	1	2	3	4
(23) School board legal services	1	2	3	4
(24) Community relations	1	2	3	4
(25) Central business services	1	2	3	4
(26) Research, planning, and evaluation	1	2	3	4
(27) Training programs for instructional staff	1	2	3	4
(28) Athletic programs	1	2	3	4
(29) Other extracurricular programs	1	2	3	4

	Very Unlikely			Very Likely
<b>Salaries</b>				
(30) Teachers	1	2	3	4
(31) Teaching assistants or aides	1	2	3	4
(32) Central office administrators	1	2	3	4
(33) Central office secretarial, clerical	1	2	3	4
(34) School building administrators	1	2	3	4
(35) School building secretarial, clerical	1	2	3	4
(36) Other professional personnel	1	2	3	4
(37) Custodians, food service, transportation workers	1	2	3	4
(38) Fringe benefits	1	2	3	4

	Very Unlikely			Very Likely
<b>Products</b>				
(39) Textbooks	1	2	3	4
(40) Classroom supplies	1	2	3	4
(41) Library materials	1	2	3	4
(42) Pupil transportation vehicles	1	2	3	4
(43) Food services equipment	1	2	3	4
(44) School building custodial supplies	1	2	3	4
(45) Major school-building maintenance items	1	2	3	4
(46) Computer hardware or software	1	2	3	4

9. Of the items in question 8, which three would you be most likely to cut and which three would you be least likely to cut? (Please use the numbers from question 8 to indicate your choices -- for example, #1, #10, #20)

most likely to cut	least likely to cut
1. _____	1. _____
2. _____	2. _____
3. _____	3. _____

10. Is your board considering any of the following cost-cutting strategies?

	Yes	No
(a) Furloughs for teachers, other employees	_____	_____
(b) Shorter school day	_____	_____
(c) Shorter school year	_____	_____
(d) Contract services	_____	_____
(e) Other _____	_____	_____

11. As you consider budget allocations, who influences your decisions? Using the following scale, circle the number that describes the level of influence for each of the following:

- 1=no influence
- 2=little influence
- 3=moderate influence
- 4=high influence

	No Influence		High Influence	
(a) superintendent	1	2	3	4
(b) other administrators	1	2	3	4
(c) fellow school board members	1	2	3	4
(d) other public officials	1	2	3	4
(e) teacher associations, unions	1	2	3	4
(f) other labor unions	1	2	3	4
(g) taxpayer groups	1	2	3	4
(h) students	1	2	3	4
(i) friends/family	1	2	3	4
(j) business organizations	1	2	3	4
(k) parent groups	1	2	3	4
(l) special interest groups	1	2	3	4
(m) vendors	1	2	3	4

12. Who has final approval of your adopted school budget?

- (a) \_\_\_\_\_ school board
- (b) \_\_\_\_\_ other governing body
- (c) \_\_\_\_\_ voters

**DEMOGRAPHIC INFORMATION**

13. In what state is your school system located? \_\_\_\_\_

14. Describe the approximate size of your school system's enrollment by checking one of the following:

- (a) \_\_\_\_\_ Fewer than 1,000
- (b) \_\_\_\_\_ 1,000 to 4,999
- (c) \_\_\_\_\_ 5,000 to 9,999
- (d) \_\_\_\_\_ 10,000 to 24,999
- (e) \_\_\_\_\_ 25,000 or more

15. Describe the community your school district serves by checking one of the following:

- (a) \_\_\_\_\_ Urban
- (b) \_\_\_\_\_ Suburban
- (c) \_\_\_\_\_ Rural
- (d) \_\_\_\_\_ Small town
- (e) \_\_\_\_\_ Other (please specify)

**PERSONAL INFORMATION**

16. Gender: \_\_\_\_\_ male \_\_\_\_\_ female

17. Are you:

- (a) \_\_\_\_\_ Black
- (b) \_\_\_\_\_ White
- (c) \_\_\_\_\_ Hispanic
- (d) \_\_\_\_\_ American Indian
- (e) \_\_\_\_\_ Asian
- (f) \_\_\_\_\_ Other (please specify)

18. Age:

- (a) \_\_\_\_\_ 25 or under
- (b) \_\_\_\_\_ 26-35
- (c) \_\_\_\_\_ 36-40
- (d) \_\_\_\_\_ 41-50
- (e) \_\_\_\_\_ 51-60
- (f) \_\_\_\_\_ Over 60

19. What is your current occupation? (Check one.)

- (a) \_\_\_\_\_ Professional/managerial
- (b) \_\_\_\_\_ Business owner
- (c) \_\_\_\_\_ Clerical
- (d) \_\_\_\_\_ Sales
- (e) \_\_\_\_\_ Skilled trade
- (f) \_\_\_\_\_ Laborer
- (g) \_\_\_\_\_ Retired
- (h) \_\_\_\_\_ Homemaker
- (i) \_\_\_\_\_ Other (please specify)

20. What level of education did you complete?

- (a) \_\_\_\_\_ Less than high school graduate
- (b) \_\_\_\_\_ High school graduate
- (c) \_\_\_\_\_ Post high school training
- (d) \_\_\_\_\_ Four-year college degree
- (e) \_\_\_\_\_ Advanced college degree

21. What is your family income?

- (a) \_\_\_\_\_ Less than \$20,000
- (b) \_\_\_\_\_ \$20,000 to \$29,999
- (c) \_\_\_\_\_ \$30,000 to \$39,999
- (d) \_\_\_\_\_ \$40,000 to \$49,999
- (e) \_\_\_\_\_ \$50,000 to \$59,999
- (f) \_\_\_\_\_ \$60,000 to \$69,999
- (g) \_\_\_\_\_ \$70,000 to \$79,999
- (h) \_\_\_\_\_ \$80,000 to \$89,999
- (i) \_\_\_\_\_ \$90,000 to \$99,999
- (j) \_\_\_\_\_ \$100,000 to \$149,999
- (k) \_\_\_\_\_ \$150,000 or more

22. Are you married? (a) \_\_\_\_\_ yes (b) \_\_\_\_\_ no

23. Do you have children currently attending public school (K-12)? (a) \_\_\_ yes (b) \_\_\_ no

24. Do you rent or own your home? (a) \_\_\_ rent (b) \_\_\_ own

**SCHOOL BOARD INFORMATION**

25. How many years have you served on the school board? \_\_\_\_\_

26. How many terms have you served on the school board?

- (a) \_\_\_ Less than one term
- (b) \_\_\_ One term
- (c) \_\_\_ Two terms
- (d) \_\_\_ Three terms
- (e) \_\_\_ More than three terms

27. How many members of your board are (a) \_\_\_ male, (b) \_\_\_ female?

28. How many members of your board are

- (a) \_\_\_ Black
- (b) \_\_\_ White
- (c) \_\_\_ Hispanic
- (d) \_\_\_ American Indian
- (e) \_\_\_ Asian
- (f) \_\_\_ Other (please specify) \_\_\_\_\_

29. Are members of your board (a) \_\_\_ elected, (b) \_\_\_ appointed?

30. Did your board make purchases in any of the following product categories in the past 12 months? (Check all that apply.)

- (a) \_\_\_ Athletic, gym, playground equipment
- (b) \_\_\_ Audiovisual equipment
- (c) \_\_\_ Building products, services
- (d) \_\_\_ Classroom equipment
- (e) \_\_\_ Communication signal and alarm systems
- (f) \_\_\_ Computer hardware or software
- (g) \_\_\_ Curriculum materials
- (h) \_\_\_ Financial and employee benefits
- (i) \_\_\_ Flooring and floor covering
- (j) \_\_\_ Food service
- (k) \_\_\_ Heating/air conditioning/ventilation
- (l) \_\_\_ Insurance
- (m) \_\_\_ Maintenance
- (n) \_\_\_ Music
- (o) \_\_\_ Transportation

31. Does your board plan to reduce (R), maintain (M), or increase (I) its purchases in the following product categories in the next budget cycle? (Check one.)

- | R   | M   | I   |  |
|-----|-----|-----|--|
| ___ | ___ | ___ | (a) Athletic, gym, playground equipment    |
| ___ | ___ | ___ | (b) Audiovisual equipment                  |
| ___ | ___ | ___ | (c) Building products, services            |
| ___ | ___ | ___ | (d) Classroom equipment                    |
| ___ | ___ | ___ | (e) Communication signal and alarm systems |
| ___ | ___ | ___ | (f) Computer hardware or software          |
| ___ | ___ | ___ | (g) Curriculum materials                   |
| ___ | ___ | ___ | (h) Financial and employee benefits        |
| ___ | ___ | ___ | (i) Flooring and floor covering            |
| ___ | ___ | ___ | (j) Food service                           |
| ___ | ___ | ___ | (k) Heating/air conditioning/ventilation   |
| ___ | ___ | ___ | (l) Insurance                              |
| ___ | ___ | ___ | (m) Maintenance                            |
| ___ | ___ | ___ | (n) Music                                  |
| ___ | ___ | ___ | (o) Transportation                         |

32. Which of the following publications are mailed to you personally? Which ones are passed on to you? Which do you read regularly? (Check all that apply.)

- | Mailed to me personally | Passed on to me | I read regularly |                                   |
|-------------------------|-----------------|------------------|-----------------------------------|
| ___                     | ___             | ___              | (a) NAASP Bulletin                |
| ___                     | ___             | ___              | (b) Executive Educator            |
| ___                     | ___             | ___              | (c) School Administrator          |
| ___                     | ___             | ___              | (d) American School Board Journal |
| ___                     | ___             | ___              | (e) Phi Delta Kappan              |
| ___                     | ___             | ___              | (f) Educational Leadership        |
| ___                     | ___             | ___              | (g) Principal                     |
| ___                     | ___             | ___              | (h) American School & University  |
| ___                     | ___             | ___              | (i) School and College            |
| ___                     | ___             | ___              | (j) School Board News             |

33. Is a major construction or renovation project planned for your school during the next 12 months? (a) \_\_\_ yes (b) \_\_\_ no

If yes, what is the estimated cost of this construction? \$ \_\_\_\_\_

**ISSUES**

34. From the following list, please rank the top three most pressing concerns in your school district. Place a 1 next to your most pressing concern; 2 next to your second most pressing concern; and 3 next to your third most pressing concern.

- (a) \_\_\_\_\_ Integration/busing
- (b) \_\_\_\_\_ Use of drugs
- (c) \_\_\_\_\_ Declining enrollment
- (d) \_\_\_\_\_ Crime/vandalism
- (e) \_\_\_\_\_ Management/leadership
- (f) \_\_\_\_\_ Facilities
- (g) \_\_\_\_\_ Personnel relations
- (h) \_\_\_\_\_ State mandates
- (i) \_\_\_\_\_ Curriculum development
- (j) \_\_\_\_\_ Large schools/overcrowding
- (k) \_\_\_\_\_ Pupils' lack of interest/truancy
- (l) \_\_\_\_\_ Poor curriculum/poor standards
- (m) \_\_\_\_\_ Difficulty getting good teachers
- (n) \_\_\_\_\_ Parents' lack of interest
- (o) \_\_\_\_\_ Lack of respect for other students/teachers
- (p) \_\_\_\_\_ Collective bargaining
- (q) \_\_\_\_\_ Lack of proper financial support
- (r) \_\_\_\_\_ Low teacher pay
- (s) \_\_\_\_\_ Lack of family structure
- (t) \_\_\_\_\_ Fighting/violence/gangs
- (u) \_\_\_\_\_ Moral standards
- (v) \_\_\_\_\_ Lack of dedicated teachers
- (w) \_\_\_\_\_ Drinking/alcoholism
- (x) \_\_\_\_\_ Dropouts

Thank you for taking the time to respond to this annual survey. The results will be published in an upcoming issue of The American School Board Journal.

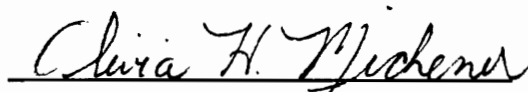
Please use the enclosed postage-paid envelope to return the survey.  
Or mail to:  
The American School Board Journal  
1680 Duke Street  
Alexandria, Virginia 22314



## Vita

Olivia H. Michener earned her B.A. degree from Goucher College in Towson, Maryland and her M.A. degree in Educational Administration from Virginia Tech, Blacksburg, Virginia. She began her career in education teaching elementary school in Woodbury, New Jersey and later in York County, Pennsylvania. She is currently a graduate assistant at the Northern Virginia Graduate Center of Virginia Tech.

Mrs. Michener served two terms on the school board of Fairfax County (Virginia) Public Schools representing the Mount Vernon district. During her terms she chaired the Instruction and Facilities Committees, was 8th District Representative to the Federal Relations Network of the National School Boards Association, and represented the board on the Virginia School Boards Association Legislative Committee. She has also served on the boards of her church and of numerous community organizations.

A handwritten signature in cursive script that reads "Olivia H. Michener". The signature is written in dark ink and is positioned above a solid horizontal line.

Olivia H. Michener