

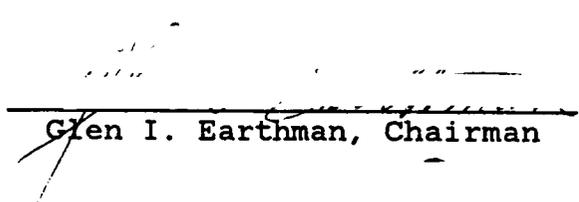
A STATUS STUDY OF CLASSIFICATION/SALARY ADMINISTRATION
OF OFFICE SUPPORT PERSONNEL
IN NORTH CAROLINA PUBLIC SCHOOLS
1985-1987

by
George Franklin Sells

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APPROVED:


Glen I. Earthman, Chairman


Wayne M. Worner


M. David Alexander


Jimmie C. Fortune


Robert Boyd

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(Abstract)

This study investigated the present status of classification/salary administration of office support personnel employed in the public schools of North Carolina. Although this study was limited to office support personnel positions, it had implications for all classified positions within the public schools. The purpose of the study was to provide information and develop recommendations for planning and establishing classification/salary administration policies for classified personnel. The recommendations addressed concerns identified through the review of literature, a questionnaire which was completed by administrators across the state and interviews with administrators from five school systems. The results from

this study indicated that superintendents, more often than other administrators, were responsible for classification/salary administration of office support personnel. The majority of office support personnel were classified in the lowest state classification levels. The criteria most often used for determination of classification levels was matching job description with state job classification level descriptions. The interview and observation methods were the two methods most often used for collecting job classification information. The majority of administrators believed: the local school systems should determine classification status, there should be a standardized performance appraisal instrument, there should be performance-based pay and salaries of office support personnel were slightly lower than the local business community.

Uniformity issues were perceived to exist both internally with the respective school system and externally by comparison of school systems. As a result of this study, recommendations for school systems to follow in their classification/salary administration policies and procedures for classified personnel were developed. The ultimate aim of these recommendations was to eliminate some of the inconsistencies found to exist.

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I would like to express my grateful appreciation to my wife, _____, and our sons, _____. It was through their patience, encouragement and sacrifices that the completion of this study was possible.

I would like to also acknowledge my parents, who sacrificed in so many ways in order for me to pursue education as a career. To my mother, I thank her for her

support throughout this program; and to my father, now deceased, I acknowledge his dedication and commitment to accomplishing goals, one of which was my completion of this program, for without his interest and encouragement throughout most of this program, completion of this dissertation would have been difficult. I dedicate this dissertation to my parents.

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CHAPTER 1

INTRODUCTION

Historically, two systems of personnel programs have been observed within the public schools: one has been for the certified employee and the other has been for the non-certified (classified) employee. A majority of school personnel policies, according to Egly, have been directed at certified personnel. Correspondingly, school district personnel divisions have focused attention toward the certified personnel relative to salary administration. Typically, when describing how a particular school system compared with another in salaries, reference was made only to salaries of the teachers and other professional staff.¹

Only in recent times has attention been given to the problem of compensation for classified personnel. Several reasons have been given for this lack of concern about the classified employees in public schools: there has been insufficient funds to employ an adequate number of classified personnel; at times selection of classified personnel has occurred because of political or other considerations which

¹ E. C. Egly, Fringe Benefits for Classified Employees, Association of School Business Officials of U.S. and Canada, Bulletin No. 19 (Evanston, Illinois, 1959), p. 15.

were not job related; the labor supply has been abundant; and school systems have generally underestimated the importance of the role of these employees.²

In the public schools of North Carolina, one distinct group of classified employees is office support personnel. Included in this group are secretaries, bookkeepers, and other clerical employees. These employees are essential for the efficient operation of the schools throughout the state, and are expected to perform in a wide variety of duties with many responsibilities.

The term "office support personnel" has encompassed more than the term "secretary," which has often been used indiscriminately as an all-inclusive term by office workers to classify anyone who worked in an office and performed clerical tasks. Hines stated that "secretarial duties are so diversified and so different from day to day that they may be likened to a chameleon, which changes color with its environment."³

Presently, there are approximately 6,000 office support personnel positions within the 140 local education agencies

² W. D. Castetter, Administering the School Personnel Program (New York: The MacMillian Company, 1962), p. 155.

³B. F. Hines, "The Relationship of the Certified Professional Secretary Rating to the Job Performance of Secretaries" (unpublished Doctor's dissertation, Virginia Polytechnical Institute and State University, 1977), p. 2.

(LEAs) throughout the state of North Carolina.⁴ Wage and salary determination for personnel in these positions have been based upon a classification and grading structure, consisting of five levels, each corresponding to various salary ranges as part of a formal statewide pay plan. North Carolina general statutes state that:

Each local board of education shall examine the duties and responsibilities of all non-certified personnel in its employment whose salaries are paid from state funds (in whole or in part), shall classify such personnel on the basis of the job evaluation descriptions established by the State Board of Education and shall pay these employees in accordance with the adopted salary schedule. The salary for these personnel shall be determined by reference to the salary schedule for state employees established by the State Personnel Commission.⁵

The objective of this study was to investigate the present status of the local classification/salary administration procedures affecting office support personnel in the public schools of North Carolina. From this status study, conclusions were drawn relative to common practices for salary administration of office support personnel found among the local education agencies across the state. Comparisons of the existing common practices were made with contemporary "best practices" found in the literature.

⁴North Carolina Public Schools Statistical Profile 1985, North Carolina State Board of Education Controller's Office, Division of Planning and Research (Raleigh, 1985), pp. 288-303.

⁵North Carolina, General Statute, 115-11 (1980).

Recommended practices and policies for improvement of salary administration of classified personnel were presented. Further need for additional research on salary administration of classified personnel was identified.

Background of the Study

During the 70s, North Carolina public schools began employing an increasing number of classified personnel. The major reason for this significant increase in the employment of classified personnel was the implementation of the primary reading program, which placed teacher aides in all primary classrooms (K-3) across the state. In 1970, approximately 25,000 classified employees worked in the public schools of North Carolina. In 1984, this number was approximately 40,000, even though the 70s marked the beginning of a continuing period of declining student enrollment and limited resource allocations.⁶

Ironically, declining enrollment did not necessarily mean a corresponding reduction in employment of classified personnel. In addition to an increase in the number of teacher aides for the primary reading program, positions were added in the area of office support personnel, the result of a greater volume of paperwork and the increasing complexity

⁶North Carolina Public Schools Statistical Profile 1985, loc. cit.

of bookkeeping, payrolls, and other clerical functions. Within the 140 LEAs throughout the state of North Carolina, classified personnel also increased in broad functional service or job areas including food service, transportation and maintenance to help provide administrative and general educational support for public instruction programs.

Wage and salary determinations for employees in these classified positions have traditionally been based upon a classification and grading structure, consisting of numerous job titles that corresponded with various salary ranges as part of a suggested statewide pay plan. However, each LEA determined how it would classify and grade employees within each job title.

In 1979, the state legislature established the North Carolina Personnel Commission for Public School Employees. This Commission was composed of nine members appointed by the Governor, one from each educational district and one member at large. The Commission's charge was to review and to make recommendations for both certified and classified employees of the public schools. Prior to this time, the state had established salary structure for certified personnel only.

After receiving the recommendations from the Commission, the legislature required the State Board of Education to develop a state salary structure for all public school employees. Therefore, beginning in 1980, a state salary

structure was established for classified personnel. The State Board allocated some categorical funding for classified personnel with full intentions for local boards of education to supplement those funds. The State Board of Education asked the State Department of Public Instruction to set up classifications to match a salary scale which the State Board of Education approved. All classified employees who were paid in whole or in part with state funds must have been placed on a salary scale within the ranges determined by the state for each job title for the 1981-82 school year.

The North Carolina Department of Public Instruction retained Hay Management Consultants in 1984 to conduct a review of the base salary program and an overview analysis of available fringe benefit programs in effect for classified personnel. The intent of this study was to propose recommendations for program change in salary administration of classified personnel. A similar study had been conducted for certified positions in 1981.

The Hay Study of base salary for classified positions included:

1. the introduction of a formal approach to job evaluation;
2. a review of the existing number and definition of job classifications currently in use;
3. comparisons of school system salary and benefit programs with those of other public and private organizations to determine the competitive positions of the state plan;

4. the development of recommended revisions to systems currently in use; and
5. a look at the feasibility of using pay-for-performance (merit) mechanisms in lieu of the current practice of awarding annual increases based upon the length of service.⁷

The Hay Study discovered wide variations in the definition and use of job titles within the different school systems. In fact, some school systems had classifications with job functions and pay levels not present in the state plan, or that treated jobs differently than was intended by the state plan.

The Hay Study also looked at a comparison between compensation for various pay levels of state classified personnel with those of similar positions in other organizations. In the study, local labor market data obtained through the Bureau of Labor Statistics revealed that the present pay levels for office support personnel were non-competitive (25-32 percent lower) when compared with compensation provided by other employers in the labor market.⁸

⁷"Review of Base Salary and Benefit Programs for Support Positions" (Hay Management Consultants: Charlotte, North Carolina, 1984) (Mimeographed), pp. 1-2. Hereafter referred to as "The Hay Study".

⁸Ibid.

The North Carolina Personnel Commission for Public School Employees studied and developed recommendations for implementing parts of the study plan outlined in the Hay Study. The Commission focused on the fundamental problems of equity, proper relationships, and the external competitiveness of classified personnel salaries. They supported the recommended reduction of job classifications and the recommended changes of titles in certain classified area jobs in order to provide a more accurate description of the work performed in those positions and to have a greater consistency among those job classifications. As a result of the Hay Study and the recommendations of the Personnel Commission, the North Carolina State Board of Education, in 1984, adopted a uniform salary schedule with ten experience increments for all classified personnel. They also reduced job classifications and changed some titles for certain classified jobs.

The North Carolina Department of Public Instruction has, historically, overseen the general process for defining, classifying, and compensating office support positions within the 140 individual school systems. Although the state agency has had some general authority in compensation matters, the funding for salaries of employees in office support positions and other classified positions have not been centrally controlled, but have been derived, in part, from local

sources. The state agency determines state fund allocations by approving positions for use within LEAs. State salary ranges are provided for each job title. In instances where position funding is locally obtained, local school systems have had a great deal of flexibility in determining classification and compensation levels for those jobs.

Classifying and compensating classified personnel, particularly office support personnel, has presented many problems for the public schools of North Carolina. A fully functional, centralized approach to wage and salary administration has not existed. The state agency has not had access to actual wage and salary information at the local level; and has not been in a position to monitor and control compensation at the local level. Recognizing some continuing problems, the legislature in 1986 set up a salary commission, composed of five members from the House of Representatives, five members from the State Senate and three members at large. This legislative commission's task was to review and make recommendations for both certified and classified employees of the public schools.

A major financial problem stems from the fact that the State Board of Education adopted salary ranges for office support personnel, but provides only about 55 percent of the funding for those salaries. The remainder of the funding for those positions has been provided by local boards of

education. A uniformity issue developed when the State Board of Education established the salary ranges but allowed local boards of education to determine their own rationale for placement of employees on those salary ranges. Therein lies the crux of the problem--one LEA may determine that an employee should be classified at a particular level while another LEA may classify an employee with identical job responsibilities at a different classification level.

A consequence of this problem has been that local boards of education have followed a tendency to maintain low classification levels for office support personnel in order to cover more of their office support personnel salaries with state funding. Although this practice has allowed local boards of education to, in essence, pay a larger number of their office support positions with the state's share of the funding and thereby save local funding; it has been detrimental to the idea of upgrading the classification status of office support personnel.

A lack of consistency has also existed because certain LEAs have classified particular office support positions significantly higher than have other LEAs, although the job tasks and responsibilities may have been very similar. This variation in classification levels among the LEAs has been difficult to justify since the state agency established the classification levels and class descriptions to match each

of those levels. In addition, a uniformity issue has prevailed within many LEAs because of their own lack of a clearly defined and objective classification system. Too often it has been obvious that LEAs have not accurately matched local office support personnel job descriptions with those developed by the State Department illustrating classification levels.

Furthermore, morale has become a major problem for school secretaries or other office support personnel who have desired to view their job as a professional career, with aspirations of career advancement. When opportunities for advancement appear to diminish, morale also diminishes. There has been a need for a clearly stated job classification system which assured systematic and objective application of job evaluation descriptions and one which illustrated the path for career advancement for office support personnel.

Finally, a concern has existed for rewarding performance--merit pay. Support for a job classification system has appeared somewhat nebulous because there were no realistic and objective standards which allowed for making decisions for individual employees regarding monetary rewards, recognition, development and promotion. Compensating performance must be an integral part of a comprehensive salary plan. In order to implement a merit pay program, the Personnel Commission recommended a uniform

personnel evaluation system be developed. At this time, the State Board of Education has taken no action on this performance incentive recommendation.

Statement of the Problem

The basic focus of this study was to analyze the current status of the classification and administration of salary policies for office support personnel in the public schools of North Carolina. Two issues were: (1) the uniformity within and among the local education agencies, and (2) the procedures used by local education agencies to classify and administer salary policies to office support personnel. A third issue was the development of procedures which would provide more uniformity in the classification of employees. The presumption was that a need for a clear, logical and uniform set of guidelines and policies for salary administration of office support personnel across the state existed. The specific research question was:

What is the current status of classification/salary administration procedures or policies for classified office support personnel in the North Carolina Public Schools?

In determining the current status for classification/salary administration of office support personnel, the following survey questions were asked:

1. Who is most directly responsible for classification/salary administration of office support personnel?

2. How many office support personnel positions are in each of the five state job classification levels?
3. How many office support personnel positions are funded by state funds? Federal funds? Local funds?
4. What are the procedures used for determination of classification levels?
5. What methods are used for collecting job classification information?

The research also focused on the administrators' perceptions regarding various aspects of classification/salary administration and performance evaluation. The following survey questions were asked:

1. Who should evaluate individual jobs to determine appropriate job classification levels?
2. Should there be a statewide standardized evaluation instrument for performance evaluation of office support personnel?
3. Should there be a performance-based reward system (merit pay) for office support personnel?
4. How do office support personnel salaries compare with similar positions in the business community?

Further study of the current status of classification/salary administration was done by more in-depth interviews in five selected LEAs. The following questions were asked of the administrator responsible for salary administration for office support personnel:

1. Does the LEA have up-to-date written salary administration policies, and if so, are they available to employees?
2. How do salary administration procedures deal with the following:

- a. initial appointment,
 - b. promotion,
 - c. reinstatement,
 - d. transfer, and
 - e. reclassification?
3. How are office support personnel appraised for performance?
 4. How does appraisal of performance affect pay?

Purpose of the Study

The purpose of the study was to provide information for planning and establishing salary administration policies that would insure valid and defensible salary decisions for office support personnel within the public schools of North Carolina. Although all LEAs have some method of salary administration in regards to office support personnel, precisely how school systems classified their office support personnel has not been known. The analysis of current practices of classification/salary administration of office support personnel was compared with recent trends in the field. Recommendations were made for improvement/modification where these current practices were found wanting.

Such information could assist the State Agency in developing policies, programs, and services to monitor and assist all school systems. An understanding of this information might have enabled the superintendent and school

board members of LEAs to develop better personnel policies for all classified personnel relative to salary administration. Superintendents who have had access to this information might be better able to identify procedures needed for use in classification of employees. The information should provide superintendents with an incentive for the establishment of criteria for performance evaluation. In addition, this information should be helpful in providing justification for existence of positions, providing data for an equitable distribution of workloads, and enhancing employee morale.

Definition of Terms

The purpose of this section is to explain how important terms of the study were operationally defined. The terms defined are: salary administration; office support personnel; job evaluation; relative net worth of a job; job factors; job classifications; job description; job specification; employee performance appraisal; and merit pay.

1. Salary Administration. A continuous activity performed to determine and justify salaries within an organization.
2. Office Support Personnel. Employees who support the activities of an office unit within a school system, and can be grouped into one of five classification

levels with performance ranging from simple routine clerical duties to administrative support services for top administration, or supervision of a specialized, technical area of operations affecting a total school system organization.⁹

3. Job Evaluation. The basis for determining the relative net worth of jobs in an organization. Job evaluation methods rank, classify or compare job factors in order of difficulty or importance of contribution to the organization.¹⁰
4. Relative Net Worth of a Job. The value each job renders to the organization.¹¹
5. Job Factors. The characteristics used in determining the value a job contributes to operations. Job factors are uniformly applied in the analysis and comparison of each job. Typical job factors include skill, education, experience, physical effort, mental demand, responsibility, job conditions, and working conditions.¹²

⁹Personnel Commission for North Carolina Public School Employees, Recommendations for Implementing the Salary Proposals in the Hay Associate Study (Raleigh, North Carolina, 1985), p. 6.

¹⁰M. P. Leaming and R. J. Motley, Administration Office Management: A Practical Approach (Dubuque: Wm. C. Brown Company, 1979), p. 336.

¹¹Ibid., p. 335.

6. Job Classification. Analyzing a job and assigning a level on a graduating scale of importance or difficulty. The method compares each job to the established scale rather than against another job.¹³
7. Job Description. The written statement outlining the duties and responsibilities of a job.¹⁴
8. Job Specification. The written statement outlining the personal qualifications that an individual must possess in order to perform the duties and responsibilities identified in the job description.¹⁵
9. Employee Performance Appraisal. A periodic rating of an employee by the supervisor. It is a means of helping supervisors evaluate work and is an aid in reaching more objective and unbiased judgements concerning the relative competency of individual employees. The major actions resulting from performance appraisal include correction,

¹²Ibid., p. 338.

¹³Ibid., p. 339.

¹⁴Z. K. Quible, Introduction to Administrator's Office Management (Cambridge: Winthrop Publishers, Inc.), p. 346.

¹⁵Ibid.

discipline, transfer, promotion, justification for a pay increase, and self-improvement plans.¹⁶

10. Merit Pay. A monetary reward separate from base salary to which an employee performance appraisal is used as the justification for granting or rejecting such a reward.
11. Local Education Agency (LEA). The administrative unit organization for a single school system in the state of North Carolina, operated by a board of education.

Limitations of the Study

This study was limited to the 140 local education agencies (LEAs) in the state of North Carolina. There were seven recognized job categories within the state for classified personnel. However, this study was limited to one of the seven categories--office support personnel. The findings cannot be interpreted to apply beyond the scope of these two major limitations.

Organization of the Study

This study was divided into five chapters. Chapter one includes an introduction to and background information for

¹⁶Leaming and Motley, loc. cit.

salary administration of classified school employees. Specifically, chapter one focuses on the classified category of office support personnel in North Carolina Public Schools, provides background information relative to the current issues, explains the purpose for this study, and defines operational definitions. Chapter two contains a review of the literature on salary administration and compensation of classified personnel. The third chapter describes the research design, the population, and the procedures used in the study. The presentation and analysis of the data appear in chapter four. Chapter five includes the summary, conclusions and recommendations.

CHAPTER 2

REVIEW OF THE LITERATURE

Introduction

Classified personnel, non-certified personnel, and non-instructional personnel are all terms used interchangeably throughout the literature in describing those employees not licensed to teach or not certified as a professional educator, but work in and for public school systems. The term classified personnel is generally preferred because people do not like to be identified as "non" anything.¹ In summarizing the review of the literature, the term classified personnel was used in describing those personnel employed by boards of education in a support function but not certified or licensed to teach. Specifically, this review of literature focuses on one category of classified personnel--office support personnel--and salary administration practices for such classified personnel.

A school system can only build and retain top-notch office support personnel by having salary administration policies that appear to be fair and serve to motivate

¹I. E. Green, School Personnel Administration (Philadelphia: Chilton Book Company, 1971), p. 162.

employees. Otherwise, retaining valuable and talented employees becomes difficult if it appears that salary administration policies cause competitive salaries to weaken. Despite the studies that have tried to downplay the importance of salaries in motivating employees, managers still assume, as they always have, that money is the object for which most people work. Most managers have continued to view money to be the most important motivator at their disposal.²

Vroom's "Expectancy Theory" is based on the premise that increases in compensation will contribute to work motivation and effort if employees see an explicit casual link between their job performance and their financial reward. Employee dissatisfaction with pay results in grievances, absenteeism, and strikes. Consequently, managers should develop and implement compensation policies with considerable care.³

Keeling and Kallows, in illustrating the importance of money as a motivator, list four major objectives of salary administration policies:

1. to attract and retain qualified competent workers,

²B. L. Keeling and N. F. Kallows, Administrative Office Management (Cincinnati: Southwestern Publishing Company, 1983), p. 195.

³Thomas A. Kochan and Thomas A. Barocci, Human Resource Management and Industrial Relations (Boston: Little, Brown and Company, 1985), p. 244.

2. to provide fair salaries for all workers throughout the organization,
3. to motivate and reward high level performance, and
4. to provide the organization with a salary structure that enables it to maintain a competitive position with other organizations.⁴

Good salary administration policies must be supported by top management and should be simple--easily administered and clearly understood by all employees. All jobs should carry a specific salary range and an employee should be assigned to fill a job at a salary within that range. It should be evident within the policies that equal pay will be provided for equal work. However, there should be differentials in the salaries paid for jobs that have different requirements. Sound, well-planned salary administration policies will enable an organization to recruit, induce, and reward employees for better performance. They tend to keep employees content, reduce complaints, and minimize resignations. Good salary administration policies also help control payroll costs.⁵

Quible contends that "the salary administration program is responsible for determining equitable salaries based on

⁴Keeling and Kallows, op. cit., p. 196.

⁵G. R. Terry and J. J. Stallard, Office Management and Control: The Administrative Managing of Information (Homeward: Richard D. Irwin, Inc., 1980), pp. 452-454.

the importance or worth of the various jobs."⁶ He also points out that there are many important factors to be considered in determining an equitable salary such as skill level, working conditions, responsibility, salaries paid for comparable jobs in other organizations, cost of living, legislation, and, in some cases, the impact of collective bargaining. Salary administration for a particular organization depends upon certain policies that govern decision-making within that organization. To guarantee equal and fair treatment, salary administration policies should determine where a newly hired employee or a recently promoted employee will be placed in a salary range. Those policies should also specify how employees will be advanced in one salary range or promoted to another salary range.

Salary administration policies should outline procedures for increasing employee's salaries. The structure of salary progression is what shows employees how they can move upward in their salary range and it also shows how employees can be promoted from one job level to a higher job level. Clear and precise communication with employees, relative to the organizations' procedures for increasing

⁶Z. K. Quible, Introduction to Administrative Office Management (Cambridge: Winthrop Publishers, Inc., 1977), p. 384.

salaries, will, in many cases, motivate them to work harder to attain maximum increases in the shortest possible time.⁷

Leaming and Motley defined salary administration as "developing and maintaining a fair and uniform method of pricing jobs and advancing employees within the age and salary intervals."⁸ They argue that proper salary administration policies allow for equalizing the cost of labor with the relative net worth of each job and, thereby, keep control over the growth of salaries. The authors contend that salary administration is a continuous activity if an organization does a good job determining and justifying salaries. The major objective of the salary administration process should be to obtain maximum productivity from each labor dollar invested in an employee.⁹

Office Support Personnel

One of the most important and sensitive job families of any organization is the secretarial group or, as defined in this study, office support personnel. Generally, office support personnel are extremely efficient at exchanging

⁷Ibid., pp. 384-394.

⁸M. P. Leaming and R. J. Motley, Administrative Office Management: A Practical Approach (Dubuque: Wm. C. Brown Company Publishers, 1979), p. 335.

⁹Ibid.

information concerning pay grades, ranges, and individual rates. Salary administration policies for office support personnel can cause serious employee relations problems if not perceived as both equitable and non-threatening to job security. Career-minded office support personnel regard their positions as professional and are constantly seeking ways to improve as professionals and as individuals.¹⁰

In spite of the sensitivity of this group, salary administration programs have historically been least precise and relatively ineffective for office support personnel. The root of the problem has been that office support personnel are frequently linked to reporting relationships rather than specific assigned responsibilities for determining salary levels. Status and responsibilities of the office support personnel's immediate supervisor has had more to do with establishing the salary range than has the office support personnel's own status and responsibilities.¹¹

Brennan further pointed out that secretaries most often are placed in a salary range strictly on seniority rather than on skill, effort, job duties, and job responsibilities. He stated that the results of participants at Professional

¹⁰R. N. Mayer, "A Progressive Approach to Secretarial Classification," Personnel Journal, No. 12, LVI (December, 1977), 608.

¹¹Ibid.

Secretaries International regional conferences held throughout the United States and Canada in 1983, revealed that employers are not dealing fairly with secretaries in the market-place. The results indicated that it was simply a matter of employees not being paid according to the value of their service.

The survey findings indicated that the single factor most predictive of secretarial salary was seniority. The second factor was the employer's pay policy (whether it paid high, average, or low salaries to all employees). Other factors were the scope of the business, title of the secretary's boss, and the number of total employees with the organization. All of those factors were better indications of salary than were specific duties, skill or education.¹²

General Compensation and Salary Administration

The following questions, according to Kochan and Barocci, are considered to be important in assessing an organization's compensation system:

(1) Is it equitable? (2) Does it satisfy legal requirements? (3) Is it competitive in the context of the external market? (4) Does it foster employee motivation and work performance? Therefore, it is important that concerns

¹²E. J. Brennan, "Compensation and Benefits," Personnel Journal, No. 4, LXIII (April, 1984), pp. 68-71.

for equity, competitiveness, legality, and motivation be incorporated into the compensation systems from the beginning.¹³

The equity issue may be the most important concern. Knowing that compensation is equitable within their organization is more important to employees than comparability with people in other organizations. William H. Davis issued the following War Labor Board report during World War II.

There is no single factor in the whole field in labor relations that does more to break down morale, create individual dissatisfaction, encourage absenteeism, increase labor turnover and hamper production than obviously unjust equalities in the wage rates paid to different individuals in the same labor group within the same plant.¹⁴

When considering total compensation for any group of employees, according to Ellig, salary is the basic pay element, upon which other elements, such as employee benefits, are structured. He contended that salary was very "high" in importance in attracting and retaining employees but of "moderate" value in motivating them. He considered the employee benefit program to have "low" ability to attract and motivate, but to have a "moderate" impact on retaining an employee. Short-term incentives were considered to have

¹³Kochan and Barocci, op. cit., pp. 243-249.

¹⁴Ibid., p. 249.

a "high" influence in being able to attract and motivate top-quality employees while long-term incentives had "moderate" impact on attracting and motivating employees. He concluded that it was most difficult to structure a total compensation program that will attract, motivate, and retain top-quality employees. Ellig emphasized that administration of a pay program requires significant effort to examine a wide range of conditions and to assure fairness and uniformity of treatment.¹⁵

Leaming and Motley proposed that a policy of salary administration should encompass the following vital components:

1. well-defined wage and salary objectives
2. satisfactory promotion and personnel policies
3. accurate job information
4. conformance with federal and state laws
5. competitive wage and salary structure
6. built-in increments
7. adequate job evaluation method
8. periodic review and evaluation procedure
9. consideration of both seniority and merit
10. established performance expectations and standards

¹⁵B. R. Ellig, "Total Compensation Design: Elements and Issues," Personnel, No. 1., LXI (January-February, 1984), pp. 22-30.

11. fair and uniform employee appraisal system
12. reasonable compensation plan and
13. sufficient wage supplements.¹⁶

Salary administration begins with job evaluations which provide a method to rank, classify or compare job factors in order of difficulty or importance to the organization. The process of job evaluation allows for a systematic method to evaluate job positions instead of personnel. The job evaluation process helps provide salary equity by establishing an acceptable internal salary structure. Periodic review of the process is a must. The procedure for job evaluation may compare one job against another job in terms of relative not worth or assign each job a position or rank in a pre-determined scale of difficulty or importance.¹⁷

Job evaluation provides a more objective basis for determining the importance of each job. It enables employees to better understand their job duties and responsibilities. It allows for employers to assign more equitable work loads. Job evaluation assists employers in areas where self-improvement may be needed. Finally, it helps in supervising employees since each job is clearly defined.

¹⁶Leaming and Motley, op. cit., p. 336.

¹⁷Ibid., pp. 337-338.

Job evaluations, which require obtaining information about the job, generally make use of three major methods for collecting job information. In the questionnaire method, instruments are completed by individuals most familiar with a particular job. The information includes a description of duties, tasks performed at certain intervals (daily, weekly, monthly, annually), and special requirements (skills, experience, knowledge) that are needed to perform the tasks. Questionnaires are appropriate when the job being evaluated is fairly easy to describe, when the job is made up of mostly physical activities as opposed to human relations, and when questionnaires can be precisely and clearly worded. The disadvantages of questionnaires are: they become too complex, there is a tendency for employees to overrate or underestimate the importance of their job, and they are time-consuming to synthesize.

The interview method involves questioning employees about the duties and responsibilities of their jobs. It is most appropriately used when the number of employees is small, when jobs are complicated, and when the job consists of human relations and personality factors. The major disadvantage of the interview method is that it is time-consuming to conduct.

The observation method requires the evaluator to observe the employee on the job and record observations on an

observation sheet. It is most useful when the job is rather complex and involves a great deal of human relations and personality factors. The disadvantage for this method of obtaining job information is that it is time-consuming.¹⁸

The concept of job evaluation is based on two fundamental objectives: one is to pay salaries commensurate with the nature of the job being performed; and the other is to pay each employee a salary that is consistent with salaries received by other employees in the organization who perform similar tasks. Job evaluation may also be used as a basis for determining lines of authority and patterns of advancement within an organization.

In reviewing the literature, four methods of job evaluations are commonly found. They include job ranking, job classification or job grading, factor comparison, and the point method. Two of these methods, job ranking and job classification, are qualitative--evaluating the job as a whole rather than in terms of job parts. The other two methods, factor comparison and the point method, are quantitative--evaluating the job on the basis of job parts or factors.¹⁹

¹⁸Quible, *op. cit.*, pp. 347-352.

¹⁹*Ibid.*, p. 364.

Job ranking requires the evaluator to compile a list of jobs in order of difficulty or importance according to their relative net worth. It compares one job against another, but does not use mathematical calculations in doing so. It is a rather simple method, but is based on subjective judgement of the evaluator.

Job classifications, or job grading, groups jobs according to a number of predetermined classes or grades. These classes or grades correspond to the salary structure. The classification method is basically easy to explain to employees. However, this method also involves subjectivity on the part of the evaluator.

The factor comparison method is based upon evaluations of basic job criteria. Key jobs are ranked according to the need for certain factors to be included in the performance of the job. Examples are: education, skill, responsibility, experience, and working conditions. A monetary value for base salary is placed on each of these factors. The end result is a comparison of each job against key jobs and their "going rate" of pay. This method is not very easily understood by employees.

One of the most commonly used procedures to evaluate jobs is the point method. With this method, job factors common to all jobs under evaluation are determined; and then assigned a proportional number of points. The number of

points relate directly to the rate of pay. This method has a great deal of objectivity and consistency.²⁰

In writing about the four methods of job evaluations, Pemberton and Gibson concluded that ". . . before salary ranges can be intellectually established, several other factors must be considered, including labor market wage competition, seniority, incentive plans, merit plans, fringe benefits, and governmental regulations."²¹ The authors strongly advocate using one or a combination of two or more of the basic methods for job evaluation, but indicate that to do so is not the end in setting up salary administration policies. After completing job evaluations for classification purposes, Pemberton and Gibson proposed using merit pay or performance pay for expanding a particular salary scale or grade. They indicated that a merit pay plan can provide an increase in salary for those employees not eligible for promotion to a higher grade.²²

Other methods of job evaluation exist, but they are essentially derived from one or more of the four types. The Hay system, for example, compares jobs across an array of

²⁰Leaming and Motley, op. cit., pp. 338-340.

²¹L. A. Pemberton and E. D. Gibson, Administrative Systems Management (Belmont: Wadsworth Publishing Company, Inc., 1968), p. 259.

²²Ibid., pp. 256-260.

client organizations and assigns job points on the basis of three factors: accountability, problem solving, and know-how. Every job has a maximum number of points based on the three factors and a dollar amount is assigned to each point.

Some organizations have tried a "pay-for-knowledge system." In this system, employees in a work unit are trained in all the jobs performed by that unit and rotation of jobs is encouraged. An employee's pay rate then becomes based on the number of skills or jobs that he or she has mastered. Pay depends on the range of skills mastered.²³

Job evaluation is defined by Quible as "the formal process of collecting information about a job to identify the components involved in performing the job."²⁴ Job evaluation helps develop equitable salary scales and provides information about the relative difficulty of the task that accompanies various jobs. Unlike time and motion studies, which are primarily engineering functions, job evaluation is an administrative function; the purpose of which is to identify duties and responsibilities of specific jobs.²⁵

²³Kochan and Barocci, op. cit., pp. 254-255.

²⁴Quible, op. cit., p. 346.

²⁵Ibid.

James Brennan has argued that pay should be linked to job descriptions. He further stated that a specific type of job description, more than a list of employment specifications, is needed for compensation decisions. Brennan pointed out that for practicality and for legal compliance job value decisions must be based on job-required skill, effort, responsibility and working conditions. He further stated that the common, standard type of job descriptions used for market survey purposes are not what is needed for on-the-job compensation purposes.

Within an organization, formal job evaluation plans for office support personnel may become a "canned plan" and based on criteria that is obscure or difficult to identify. Therefore, Brennan warned against job descriptions being written as an attempt to justify higher pay. Job descriptions which use fancy language, elaborate generalities, key phrases and code words to describe job duties in an overly impressive manner are useless. They paint a false picture of actual job content and create misleading impressions of the value of a job.

Instead, Brennan advocated customized job evaluation plans designed to use whatever measures of skill, effort, responsibility and working conditions which are reliably observable in all jobs, according to the degree those factor measures accurately predict proper pay rates. He contended

that such plans can assure internal as well as external competitiveness. Brennan argued that the real advantage of the custom job evaluation approach is that the evaluation factors truly fit the job. As that job content changes, the factors can be changed. As a result, compensation is not based on an individual's ability as an author or editor of a job description.²⁶

The Salary Schedule

According to Leaming and Motley, the general purpose of a compensation plan is to allocate the resources for salaries in an organized manner that will attract and retain the best human resources available. The compensation plan has the same objectives as the salary policies. The actual amount budgeted by any organization is based on that organization's ability to pay. In some organizations a large portion of the total budget is expended for the human resources required by the organization. An example of this type of organization is a typical public school system.²⁷

In developing the compensation plan, there are basic principles of salary schedules to be considered for

²⁶E. James Brennan, "Job Descriptions and Pay: The Inevitable Link," Personnel Journal, No. 7, LXIII (July, 1984), p. 18.

²⁷Leaming and Motley, op. cit., pp. 343-345.

classified personnel. First, salary schedules should be made public. All classified personnel should be on a salary schedule. Salary schedules should reflect equity and should represent the prevailing wage rate for each position. Salary schedules should be organized in ways to facilitate administration. There should be some rationale for establishing the dollar amounts shown on the salary schedule. Last of all, provisions should be made for a regular salary schedule review.

There are many factors to consider in establishing salary schedules. It is important to identify the minimum educational requirements needed for any position. Skills required for the position, number of employees to be supervised, the responsibility assigned to each position, and the hierarchy of positions are among the factors to be considered.²⁸

Good principles of salary scheduling require setting minimum and maximum scales with increments to reflect the progress up the scale for each position classification. The difference in salary schedules among classifications should be significant enough to stimulate continued improvement and growth. Finally, it must be determined that salary schedules

²⁸Green, op. cit., pp. 178-180.

are high enough, in comparison with other opportunities for employment, to attract competent workers to the position.²⁹

One of the newest techniques for salary scheduling, which is realistic and fairly simple, is the guideline method. With this method, the price of a job, or what salary a job is worth, is relative to the interpretation of the labor market. In essence, the price of the position of the labor market at a given time is the decisive factor for setting the salary scale for a particular position. The guideline method of salary scheduling has some advantages. It is inclusive and eliminates the need to have several salary structures in order to satisfy geographic differences. It is objective in that it is based on what different jobs in the market place are being paid.³⁰

For salary scheduling, James Brennan referred to salary grades. He defined a salary grade as "a compensation administration device that is used to accomplish the pay objectives of cost control, external competitiveness, and internal equity."³¹ The salary grade illustrates the minimum

²⁹H. Davis, Personnel Administration in Three Non-Teaching Services of the Public Schools (Columbia: Bureau of Publications Teachers College, 1969), p. 144.

³⁰Terry and Stallard, op. cit., pp. 453-455.

³¹E. J. Brennan, "Compensation and Benefits: Everything You Need to Know About Salary Ranges", Personnel Journal, No. 3, LXIII (March, 1984), p. 10.

and the maximum of a salary schedule. When an employee reaches the maximum salary ceiling in the grade range, the employee cannot receive further salary increases in that job until the maximum ceiling is raised in response to competitive market value changes.

Jobs are usually assigned or classified into salary grades whose parameters include the externally and internally competitive rate paid for a particular job. The standard procedure is to use the middle of the grade range (midpoint) as the competitive reference point. Jobs are then classified into those salary grades that have midpoints closest to competitive rates for the same jobs. These methods are to assure that salary grades are helpful in setting up salary schedules which meet cost control objectives and are internally equitable and externally competitive.³²

The Classification Plan

Primarily, the drafting of a fair salary schedule is dependent on a classification of personnel. The scope of the classification for teachers usually exists in the legal requirements for certification and in the usual division of duties among teachers and principals. However, the duties of non-teaching employees (classified personnel) are not so

³²Ibid., pp. 10-16.

clearly stabilized and the need is greater for a written statement of the requirements for different positions. Specifically, a need exists to classify office support positions and the classification should indicate duties and some qualifications for each class. The objective of the classification system is to lay the foundation for equitable treatment for employees by an accurate definition, orderly arrangement, and fair evaluation of positions.³³

According to Egly, a classification plan is not an end in itself but serves as an essential tool for personnel salary administration. It helps in the recruitment and selection of qualified employees to fill vacant positions. It provides a basis for developing objective tests of the skills required for particular jobs. A classification plan allows for the principle of equal pay for equal work to be followed. Most personnel transactions such as promotion, transfer, and demotion can best be facilitated by a classification system. A proper classification system can serve as the basis for determining employee training needs. In addition, morale among employees is improved when everyone

³³Davis, op. cit., pp. 137-139.

understands the classification system and where their position fits in that system.³⁴

Robert Harvey reviewed recent empirical research on quantitative approaches to job classification. Job classification underlies many activities in the field of personnel psychology which form the basis for personnel tasks such as performance appraisal, career path planning, job evaluation, and test validation. The job analysis database can be analyzed to uncover groupings of positions that possess similar profiles of work activities. Because most personnel decisions are made at the job or family of jobs level, the importance of job classification is paramount. Bad decisions made at this level will, of course, perpetuate subsequent decisions to be unavoidably poor.

Harvey defined the term "quantitative job classification" by saying it "will denote the application of quantitative methods to form and justify conclusions regarding the similarity or differences of two or more personnel entities."³⁵ The position and the job are the two most common personnel entities encountered in job

³⁴E. C. Egly, Fringe Benefits for Classified Employees (Evanston: Bulletin #19, Association of School Business Officials of U.S. and Canada, 1959), p. 65.

³⁵Robert J. Harvey, "Quantitative Approaches to Job Classification: A Review and Critique," Personnel Psychology, No. 2, XXXIX (Summer, 1986), p. 268.

classification. Job classification reveals information about organizational work activities. Harvey referred to this connection of personnel entities into more abstract groupings as a "taxonomy." He further stated that the purpose of job classification was simply to decide whether two existing jobs are similar enough to share a common selection system or salary grade.

To date, according to Harvey, many researchers have advocated a particular quantitative technique for making job classification decisions. Consequently, a technical debate has occurred over the question of which one should be used. To aid in evaluating quantitative techniques, Harvey organized procedures into two groups: first, the descriptive techniques--those that are concerned with using an exploratory approach to uncovering groupings of entities; and second, the inferential techniques--those that employ statistical significance tests of job differences.

Two important differences between the inferential and descriptive job classification techniques have relevance to personnel managers. "First, the input databases are qualitatively different insofar as the inferential approaches require multiple ratings of each personnel entity to be grouped, whereas the descriptive ones do not."³⁶ This could

³⁶Ibid., p. 283.

mean that if other factors are equal, the inferential approaches will be more costly in terms of the time required for data collection. "Secondly, descriptive job classification techniques operate in a largely exploratory fashion, taking information on each of the entities to be classified and producing job taxonomy; thus, the practitioner need not have any prior ideas regarding the job taxonomy to be expected.³⁷ With inferential techniques, the user must possess a known classification scheme prior to the job classification being completed.

According to Harvey, the potential for serious problems may exist using inferential techniques if the multiple observations requirement is satisfied by using job incumbents as raters when grouping jobs to form job families. What commonly happens in these studies is that data is collected by the individuals who are currently performing in the job, and thus, these individuals provide the job analysis data. Harvey pointed out that when this is the case, any differences that occur between the multiple ratings of each personnel entity to be grouped are presumed to be due to chance factors rather than systematic differences in the work performance. He considered this to be a very tenuous assumption.

³⁷Ibid.

In conclusion, it is evident that Harvey only recommended a classification system which derived its basis from research. A classification system developed by non-empirical means such as using the judgments of personnel administrators or managers allows for too many flaws. He further concluded that the choice of a job classification system is not an all-or-none, descriptive-versus-inferential choice. Much of the job classification research has combined multiple techniques to achieve specific objectives.³⁸

The position classification concept is the foundation for an effective compensation plan. Castetter included the following steps in a classification plan for school employees:

1. develop a detailed analysis of each position, especially duties and responsibilities involved;
2. assign each position to an appropriate class;
3. state the duties and requirements of each position;
4. establish qualification standards to fill the positions;
5. set salary ranges for positions in a given category or classification.³⁹

Castetter considered a classification system the basis for expression of fiscal policy for classified employees.

³⁸Ibid., pp. 267-287.

³⁹W. D. Castetter, Administering the School Personnel Program (New York: The Macmillan Company, 1962), p. 157.

It also is a planning aid for both current and long-term budgets. With the classification system, the administration of classified personnel is moved from the expediency level to a level with direction and control. Ultimately, a classification system promotes economy and efficiency by being designed to employ only the number of personnel needed to perform the services, and to attract and retain personnel who are competent to perform those services.⁴⁰

The classification system often groups positions. They may be grouped into families of positions, such as three levels of secretaries--secretary I, secretary II, secretary III and so on. Positions are also grouped by salary. Criteria considered for salary grouping includes the amount of training required for the position, the level of responsibility, the experience needed to qualify for the position and the number of employees to be supervised. Positions are grouped into classes, with a class being a group of positions sufficiently similar in duties and responsibilities that the same descriptive title may be used to designate each position in the class. Generally, each position within the class has the same requirements of education, experience, and ability. The same tests for

⁴⁰Ibid., pp. 157-158.

selection is used and consequently, the same salary range is applied with equity.

Within the classification system, the total duties to be performed within the family of positions allow for simple responsibilities assigned to the entrance-level positions and the complex responsibilities assigned to the higher classifications. The objective is to pay the "going rate" for a particular level of responsibility. Frequently, the volume of work instead of the level of work is used as evidence for a request for job classification.

Reclassification or the request for reclassification is something that must follow a consistent procedure. Most school systems have no provision for auditing positions on a regular basis according to Green. In the final analysis, the decision to reclassify an employee is based on the level or responsibility with the position. An increase in the work load results in assigning more labor hours to the position. Any increase in responsibility results in a position reclassification.⁴¹

The implication from Green and others relative to the rationale for classification or reclassification certainly applies to office support positions. The office support classification system relates to job responsibilities and not

⁴¹Green, op. cit., pp. 163-177.

just to the management level of the office support personnel employee's immediate supervisor. In his article, "A Progressive Approach to Secretarial Classification," Robert Mayers stated, "While it may be true in theory that higher level executives require more administratively oriented and higher paid secretaries, this generalization does not hold in many individual situations."⁴² Mayer argued that it is not uncommon to find secretaries of lower level managers who answer correspondence, conduct staff orientation, and set up meeting agendas for much less salary than do secretaries who basically function as clerks or typists for a vice-president.

The system of job classification that ties secretarial salaries to the level of immediate supervisors is a poor system. Instead, Mayer recommended making a determination of the number of administrative levels and identifying key responsibilities for each separate level including clerical. Thus, there are many possible combinations of supervisory levels and responsibilities. The final step is to create secretarial levels based on the combinations. This system places a value on job content.⁴³

⁴²Mayer, loc. cit.

⁴³Ibid., pp. 608-610.

Performance Appraisal and Merit Pay

Every time a salary decision is to be made by an employer, a risk is taken with the employer's assets. If employee productivity does not meet an adequate return for the compensation investment, then the organization suffers. The organization is likely to suffer if it increases compensation without first assuring that the value of the employee's work has increased or will increase more than the cost of the salary increase. Consequently, salary administrators must stop playing compensation games of chance and begin paying employees for what they are worth.⁴⁴

Many difficulties lie in appraising others' efforts in an objective, accurate, and constructive manner. Yet decisions about whether to promote, retrain, fire, or give a raise are frequently based on the appraisal of performance process. One of the problems associated with evaluating the performance of others is that people seem to consistently overevaluate their own performance. Therefore, they seem to be disappointed with the results of their own evaluations no matter how accurately and fairly they are done. Providing disappointing feedback to employees without demotivating them

⁴⁴E. J. Brennan, "Compensation: Why Automatic Raises Are a Dangerous Risk," Personnel Journal, No. 9, LXIII (September, 1984), p. 35.

is one of the most difficult aspects of performance appraisal.

The performance appraisal system is designed to convey the necessary evaluative information in as useful a way as possible. Evaluation is based on actual job requirements and expected work outputs. Evaluation systems, particularly if they relate to merit pay, that focus on general worker traits such as cooperativeness, creativity, or efficiency are not very useful nor are they easy to justify and defend.⁴⁵

Many legal characteristics have influenced performance appraisal and have reinforced the movement toward a more specific work-related performance appraisal procedure. A recent review of case law pertaining to performance appraisal revealed the following advice:

1. base performance standards on a thorough analysis of job contact;
2. evaluate employees on specific dimensions of performance rather than general traits;
3. define performance dimensions in behavioral terms; and
4. support evaluations with objective, observable evidence.⁴⁶

⁴⁵Sara L. Rynes and George F. Milkovich ed., Current Issues in Human Resource Management: Commentary and Reading (Plano, Texas: Business Publications, Inc., 1986), pp. 274-277.

⁴⁶Wayne F. Cascio and H. John Bernardin, "Implications of Performance Appraisal Litigation for Personnel Decisions," Personnel Psychology, XXXIV (1981), pp. 211-226.

There is a tendency for modern workers to take a more active role in decisions concerning their careers. Thus, more specific performance standards, detailed evaluative feedback, and formal mechanisms for expressing dissatisfaction with appraisal results are in vogue. Career-oriented workers are more likely to request specific information about what is expected of them and how they can improve their chances of obtaining merit pay and promotions. They are also likely to resent being evaluated based on general traits or personality characteristics. The implication seems clear that the most effective performance appraisal procedures are those that most closely reflect the organization's objectives, the nature of the work involved, and the characteristics and preferences of those who perform it.⁴⁷

⁴⁷Rynes and Milkovich, *op. cit.*, pp. 278-279.

CHAPTER 3

PROCEDURES

The major objective of this study was to investigate the present status of the classification/salary administration of office support personnel by local boards of education in the public schools of North Carolina. From the review of literature in Chapter 2, it was apparent that research was needed on salary administration programs for classified personnel. Chapter three contains the outline of the study which will provide additional information in this area.

The purpose of this research was to provide information for planning and establishing salary administration programs that would insure valid and defensible salary decisions for office support personnel within the local education agencies (LEAs) of North Carolina. A status study of current salary administration practices was conducted, and recommendations for improvement/modification of current practices were proposed. This section also presents the research design for the study, and it includes a description of the population, instrument development, and data collection procedures.

Population

The population for this study included the 140 local school systems in North Carolina. Data sought for the study were obtained through the central office of each school system and the request for gathering the information was directed through the superintendent, personnel director or business manager. All North Carolina LEAs were sent a letter stating the purpose of the study along with a questionnaire. The request for information was sent to either the superintendent, personnel director or other designated administrator. However, in all cases, superintendents received a copy of the request. Questionnaires were sent to persons in different positions determined by the organizational structure or assignment of duties for particular LEAs.

The 140 LEAs in North Carolina provided diversity in size, ranging from a student enrollment of 615 to 74,559. Within the total number of LEAs, 100 represented county school systems, while 40 represented city school systems.

Instrument Development

Data needed for the study included responses describing salary administration policies, practices and procedures. Specific questions to research were determined by reviewing the literature and evaluating the report of the Hay Study.

Decisions were made relative to what information was desired on the status of job classifications of public school office support personnel. Consequently, a questionnaire was sent to each LEA, along with a letter stating the purpose of the research. A copy of the questionnaire and the letter are included in the Appendix.

The questionnaire asked for the LEA to identify itself by the local education agency code number, to indicate if the school system was considered to be more rural or urban, and to identify the administrative position within the school system most responsible for salary administration of classified personnel. Using the LEA code number from the returned questionnaire and the North Carolina Education Directory: 1986-87, each LEA was identified by size (student enrollment), educational district and type of school unit.

The questionnaire was developed with the possible categories of responses anticipated offered as alternatives to objective questions. The objective questions were determined after administering open-ended forms of the questions to a small sample of subjects representative of the population to be used. In addition, the open-ended forms of the questions were sent to State Department of Public Instruction personnel, professors of school business and public school business managers. The open-ended questionnaire is included in the Appendix.

For content validity, the objective questionnaire was also reviewed by the State Department of Public Instruction personnel, professors of school business and public school business managers. The assumption was made that this group of professionals represented a knowledgeable group on the subject of classified employees in the public school setting. Space was provided on the trial questionnaires for the respondents to make comments and suggested changes. The returned trial questionnaires were checked for items left blank or yielding no useful information, misinterpretations and ambiguities. Comments were also checked for similar indications. Results were analyzed to assess the effectiveness of the trial questionnaire to yield the information desired. Appropriate additions, deletions, and modifications to the questionnaire were then made.

Data Collection Procedures and Data Analysis

Questionnaires were sent on June 30, 1986, along with a transmittal letter indicating a return deadline of July 18, 1986, to each of the 140 LEAs. LEAs that did not return their questionnaire by the deadline date were sent a follow-up letter. If, after a reasonable amount of time, the LEA had still not returned the questionnaire, the superintendent was called by telephone and once again asked to assist with the study. Returned questionnaires were checked for recording

data. If particular questionnaires presented vague or incomplete data, telephone calls were made as a follow-up to the subjects for an effort to clarify the data. The data analysis from the questionnaires is shown through frequency distributions. Narrative descriptions of the data and interpretations of the data are provided in Chapter 4, "Presentation and Analysis of Data."

Additional data were obtained by personal interviews with the administrator most responsible for classification/salary administration in five LEAs within the state. These data were used to verify data from the questionnaires. The five LEAs were selected by the State Department of Public Instruction and represented both large and small school systems as well as both city and county school units.

The interviews were scheduled and conducted at the central office within the five LEAs. Each interview was conducted by following a set of developed questions, included in the Appendix, used to gather specific data. Data were obtained regarding salary administration policies and procedures as well as salary scales currently being used. More specific data about how office support positions were evaluated for classification purposes were derived. Data were obtained about how salary administration procedures addressed initial appointment, promotion, reinstatement, transfer and reclassification of office support personnel.

Data provided details on how office support positions were appraised for performance and how performance appraisal affected pay. Finally, data showed the opinions of the administrators regarding uniformity issues among the LEAs in the state and within each LEA relative to the classification of office support personnel.

Data were analyzed by reviewing notes from each interview. Narrative descriptions explained the data interpretations. An attempt was made to compare differences and similarities among the five LEAs studied, relative to how they implemented classification/salary administration procedures for office support personnel. Finally, the interpretations from the interviews were compared with the data from the survey results to formulate conclusions of the status study.

CHAPTER 4

PRESENTATION AND ANALYSIS OF DATA

Introduction

The purpose of Chapter Four was the presentation and analysis of data. A questionnaire designed to collect two distinct types of data, in addition to demographic data, was developed. Questions were designed to collect data on the current status of the classification for salary administration of office support personnel. Other questions were designed to collect data relative to the administrators' perceptions regarding various aspects of classification/ salary administration and performance evaluation of office support personnel. The questionnaires were sent to the 140 LEAs throughout North Carolina. A total of 107 LEAs responded to the questionnaires, representing a 76.4 percent return.

The questionnaire also included questions designed to provide demographic data regarding the LEA. Identification data for each LEA were obtained through reference to the LEA code number found in the North Carolina Education Directory: 1986-87, issued by the North Carolina Department of Public Instruction.

In addition to the questionnaire, information was obtained through personal interviews with administrators primarily responsible for classification of office support personnel in five LEAs. Specific information regarding how office support positions were evaluated for classification purposes was also collected. Data were analyzed by reviewing notes for each interview and were discussed in narrative descriptions.

Demographic Data for Survey

The demographic data from the 107 LEAs responding to the survey are presented in Table 1. The LEAs responding to the survey appeared to be representative statewide in each of the categories: student enrollment, educational districts, type administrative units and LEA descriptions. Sixty-eight LEAs in the state had student enrollments of 5,000 or less and 57 (84%) responded to the questionnaire. Thirty-nine LEAs had an enrollment of 5,001 to 10,000 and 27 (69%) responded; 28 had an enrollment of 10,001 to 25,000 and 20 (71%) responded; and five LEAs had an enrollment of more than 25,000 and 3 (60%) responded to the questionnaire.

In the distribution of returned questionnaires, District 1, consisting of relatively small school systems in the Northeast region of the state, had the fewest responses with a 53 percent return. District 7, representing the Northwest

Table 1

Demographic Data for LEAs
Responding to Questionnaire
(n=107)

Student Enrollment	Total LEAs	Responding LEAs	Percent LEAs Responding
0 - 5,000	68	57	84%
5,001 - 10,000	39	27	69%
10,001 - 25,000	28	20	71%
More than 25,000	5	3	60%

Educational District	Total LEAs	Responding LEAs	Percent LEAs Responding
District 1	17	9	53%
District 2	16	12	75%
District 3	18	13	72%
District 4	16	14	88%
District 5	21	16	76%
District 6	15	11	73%
District 7	19	17	89%
District 8	18	15	83%

Type Administrative Unit	Total LEAs	Responding LEAs	Percent LEAs Responding
County	100	72	72%
City	40	35	88%

LEA Description	Responding LEAs	Percent LEAs Responding
Urban	19	32%
Combination - more urban than rural	15	
Rural	42	65%
Combination - more rural than urban	28	
No description	3	03%

region of the state, had the most responses with an 89 percent return. Of the 107 returned questionnaires, 72 were responses of county administrative units and 35 were responses of city administrative units. The responses represented 72 percent of all county administrative units and 88 percent of all city administrative units. Of the 107 responding LEAs, 19 were reported to be urban and 42 were reported to be rural. Of the responses, 15 LEAs indicated a combination description, but more urban than rural; 28 reported to be a combination, but more rural than urban. Three responding LEAs did not indicate a description. A greater number of the responding LEAs (65%) reported to be rural or more rural than the number of LEAs (32%) that reported to be urban or more urban.

Findings and Presentations From Survey

As the questionnaires were returned, they were reorganized for data processing. The Statistical Package for Social Sciences was used to analyze the data. Frequency distributions and percentages were calculated for each item on the questionnaire. The analysis of the data and presentation of the findings from the survey are discussed according to the two types of questions included on the questionnaire.

The first type of questions focuses on the current status of classification for salary administration of office support personnel. The following current status questions were asked:

1. Who is most directly responsible for classification/salary administration of office support personnel?
2. How many office support personnel positions are in each of the five state job classification levels?
3. How many office support personnel positions are funded by state funds? Federal funds? Local funds?
4. What criteria are used for determination of classification levels?
5. What methods are used for collecting job classification information?

Table 2 illustrates the number of office support personnel employed by the 107 LEAs. An analysis of the returned questionnaires revealed that 24 of the LEAs employed 10 or fewer office support personnel, 25 LEAs employed 11 to 20, 18 LEAs employed 21 to 30, 10 LEAs employed 31 to 40, 10 LEAs employed 41 to 50, and 20 LEAs employed 51 or more office support personnel.

The relationship between student enrollment and the number of office support personnel employed by the LEA was investigated using the procedure crosstab and chi-square and was found to be statistically significant at the .05 level. As could be predicted, the larger the LEA's student enrollment, the more office support personnel employed. The

Table 2

Number of Office Support Personnel
Employed by LEAs
(n=107 LEAs)

Number of Office Support Personnel	Number of LEAs
0 - 10	24
11 - 20	25
21 - 30	18
31 - 40	10
41 - 50	10
51 +	20

table showing the test for significance is included in the Appendix.

Table 3 illustrates that the superintendent is directly responsible for classification of office support personnel and handles the responsibility completely in 30 LEAs. An associate or assistant superintendent is responsible and handles it completely in 22 LEAs. The personnel director is fully responsible in 15 LEAs and the finance officer is fully responsible in 13 LEAs. The superintendent shares the responsibility with an associate or assistant superintendent in one LEA; with the personnel director in three LEAs and with the finance officer in one LEA. An associate or assistant superintendent shares the responsibility with the personnel director in three LEAs and with the finance officer in one LEA. The personnel director shares the responsibility with the finance officer in five LEAs.

Table 3 shows that, next to the superintendent, the finance officer is more directly involved in classification of office support personnel than are any other administrators. Three returned questionnaires revealed that other positions were directly responsible for classification of office support personnel and all of those had the responsibility exclusively. The other positions were listed as a director of non-certified personnel, a coordinator of classified personnel and an administrative assistant.

Table 3

Administrator Responsible for
Classification/Salary Administration
(n=107)

Administrator Responsible	LEAs
Superintendent	30
Associate or Assistant Superintendent	22
Personnel Director	15
Finance Officer	13
Superintendent/Associate or Assistant	1*
Superintendent/Personnel Director	3*
Superintendent/Finance Officer	11*
Associate or Assistant Superintendent/ Personnel Director	3*
Associate or Assistant Superintendent/ Finance Officer	1*
Personnel Director/Finance Officer	5*
Other	3

*Shared responsibility

Table 4 illustrates the number of office support positions in each of the five state job classification levels. Of the 107 LEAs reporting there were 366 office support personnel positions classified at Level I. There were 926 positions classified at Level II; 1047 positions at Level III; 328 positions at Level IV; and 141 office support positions classified at Level V.

Table 5 shows an analysis of the number of LEAs employing office support personnel positions at each of the state classification levels. It reveals that 96 LEAs classified 10 or fewer office support personnel at Level I. Six LEAs classified 11 to 20 at Level I, three LEAs classified 21 to 30 at Level I and two LEAs classified 31 to 40 at Level I. The results showed that 73 LEAs classified 10 or fewer office support personnel at Level II. Twenty-two LEAs classified 11 to 20 at Level II, eight LEAs classified 21 to 30 at Level II, two classified 31 to 40 at Level II, one classified 41 to 50 at Level II, and one classified more than 50 at Level II. The analysis indicated that 79 LEAs classified 10 or fewer office support personnel at Level III. Twelve LEAs classified 11 to 20 at Level III, eight LEAs classified 21 to 30 at Level III, six LEAs classified 31 to 40 at Level III, and two LEAs classified more than 50 at Level III. All 107 LEAs classified 10 or fewer office support personnel at state classification Level IV and Level V.

Table 4

Number of Office Support Personnel
Employed by LEAs in Each
State Classification Level
(n=107 LEAs)

Classification Levels	Number of Personnel
Level I	366
Level II	926
Level III	1047
Level IV	328
Level V	141

Table 5

Number of LEAs Employing Office Support Personnel
Positions by Classification Levels
(n=107 LEAs)

Number of Positions	State Classification				
	Level I	Level II	Level III	Level IV	Level V
0 - 10	96	73	79	107	107
11 - 20	6	22	12	0	0
21 - 30	3	8	8	0	0
31 - 40	2	2	6	0	0
41 - 50	0	1	0	0	0
51 +	0	1	2	0	0

Table 6 illustrates the number of office support personnel employed by the 107 LEAs and the source of funding for those positions. Federal funds provided 98.2 positions; state funds were used to provide 1429.2 positions; and local funds provided 1716.6 positions. Fractional positions accounted for some positions being funded by combinations of funding sources.

Table 7 illustrates the procedures used by the LEAs for determination of classification levels. The returned questionnaires from 107 LEAs reveal that 35 LEAs matched a local job description with the state job classification level descriptions to determine classification status of their office support personnel. Of the 107 LEAs, 25 used an initial placement study by the LEA to determine classification levels. Five LEAs used an initial placement study by the state department of public instruction. Eight LEAs used job experience to determine classification levels. A combination of matching job description with state job classification level descriptions and an initial placement study by the LEA was used by five LEAs. A combination of matching job description with state job classification level descriptions and job experience was used by 15 LEAs. Five LEAs used the combination of an initial placement study by the LEA and job experience to determine classification levels for their office support personnel.

Table 6

Number of Office Support Personnel
Employed by LEAS by Funding Source

Funding Source	Number of Positions
Federal Funding	98.2
State Funding	1,429.2
Local Funding	1,716.6

Table 7

Procedures Used for
Determination of Classification Levels

	LEAs (n=107)
1. Matched job description with state job classification level description	35
2. Initial placement study by LEA	25
3. Initial placement study by state department of public instruction	5
4. Job experience	8
5. Combination of #1 and #2	5
6. Combination of #1 and #4	15
7. Combination of #2 and #4	5
8. Other	9

Nine LEAs reported that they used other procedures for determining job classification levels for office support personnel. All LEAs that reported use of other procedures were reported to have used them exclusively and not in conjunction with any other procedure. The other procedures reported were: matching the status level of the immediate supervisor, hiring a professional consulting firm to do an independent study, classifying personnel rather than positions, using a classification committee to decide levels, and matching classifications with guidelines which reflected the employee's education and size of the school in which the employee worked.

An analysis of responses from the returned questionnaires revealed that all LEAs used combinations of methods to collect job classification information. No particular method was reported to be used exclusively. Table 8 illustrates that the interview method for collecting job classification information was used most frequently with 64 LEAs using it in conjunction with one or more different methods. The observation method was used the next most frequently with 60 LEAs using it in conjunction with one or more different methods. The questionnaire method was used by 38 LEAs in conjunction with one or more different methods. Other methods written in on the returned questionnaires accounted for methods used by nine LEAs. The other methods

Table 8

Methods for Collecting Job
Classification Information

Method*	LEAs (n=107)
Interview	64
Observation	60
Questionnaire	38
Other	9

*All methods were used in conjunction with one or more different methods.

listed included reviewing employee classifications, work experience, analysis of work by the supervisor, and a narrative documentation of job tasks by the employee. Again, all other methods were reported to be used in conjunction with one or more different methods listed on the questionnaire.

The second group of questions included in the questionnaire focused on the administrator's perceptions regarding various aspects of classification/salary administration and performance appraisal. The following questions were asked:

1. Who should evaluate individual jobs to determine appropriate job classification levels?
2. Should there be a statewide standardized evaluation instrument for performance appraisal of office support personnel?
3. Should there be a performance-based reward system (merit pay) for office support personnel?
4. How do office support personnel salaries compare with similar positions in the business community?

Table 9 illustrates the frequency distributions of the administrators' perceptions. The first of these questions asked for an opinion on who should evaluate individual jobs to determine the appropriate state salary level. The majority or 68 of the 107 administrators who completed the questionnaire indicated that the LEA should determine the appropriate state salary level. Only nine administrators felt it should be done by the state agency. However, 30

Table 9

Frequency Distributions of
Administrators' Perceptions
(n=107 LEAs)

Question 1: Who should evaluate jobs to determine classification?

Opinion	LEAs
LEA	68
State agency	9
Both	30

Question 2: Should there be a standardized evaluation instrument?

Opinion	LEAs
Yes	80
No	24
No response	3

Question 3: Should there be a performance-based reward system?

Opinion	LEAs
Yes	88
No	15
No response	4

Question 4: How do salaries compare with local business community?

Opinion	LEAs
Slightly higher	26
Slightly lower	39
Much lower	10
About the same	27
No response	5

administrators felt it should be done jointly by both the LEA and the state agency.

Table 9 shows that in response to a question about whether or not the state agency should develop a standardized performance appraisal instrument, an overwhelming majority or 80 of the administrators said "yes". The returned questionnaires revealed that 24 administrators answered the question by saying "no". Two administrators did not respond and one indicated "not applicable", which was treated as a no response. Regarding whether or not there should be a performance-based reward system, as illustrated in Table 9, a large majority or 88 administrators indicated "yes" while 15 responded by indicating "no". Four administrators did not respond. The last question asked for the administrator's perception of how the LEA salaries of office support personnel compared with similar positions in the business community. Table 9 shows that from the 107 responses, 26 administrators indicated that salaries were slightly higher; 39 indicated they were slightly lower; 10 indicated they were much lower; 27 indicated they were about the same; three did not respond; and two gave more than one response which was treated as a no response.

Demographic Data for Interviews

Interviews for this study were conducted with five administrators who were most directly responsible for classification of office support personnel in their respective LEAs. Table 10 illustrates the demographic data for those five LEAs. The LEAs were selected by the State Department of Public Instruction and were selected to provide diversity in size of student enrollment and representation of both urban and rural areas.

Interviews were conducted on-site at the respective LEA central administrative offices. A prepared set of interview questions were used for each interview, a copy of which is included in the Appendix. Notes were taken on all interviews. Interviews lasted approximately one hour. The first took place on April 27, 1987; the final interview was held on May 27, 1987. Notes were made summarizing each interview within a few days following the interviews and telephone calls were made to the person interviewed to verify the summary notes.

The analysis of the data and presentation of the findings from the interviews were discussed according to the interview questions. The differences and similarities among the five LEAs studied, relative to their procedures for classification/salary administration of office support personnel, were discussed. Finally, in summarizing the

Table 10
 Demographic Data for
 LEAs Involved in Interviews

LEA	Student Enrollment	Educational District	Type Administrative Unit	Title of Administrator Interviewed
LEA-1	10,001-25,000	6	County	Administrative assistant
LEA-2	More than 25,000	5	City/County	Director of personnel
LEA-3	10,001-25,000	5	County	Assistant superintendent
LEA-4	0-5,000	6	City	Director of personnel
LEA-5	10,001-25,000	7	County	Director of personnel

study, interpretations of the data were compared with the data analysis from the survey results to formulate conclusions.

Information Gathered From the Interviews

Only one of the five LEAs have board policies, but three of the five LEAs have written administrative policies that address salary administration of classified personnel. The LEAs that have written policies indicated they review them frequently for updating and make copies available for employees. One LEA holds staff meetings periodically for classified personnel at which time the policies are explained.

All but one administrator reported that their LEA closely follows the recommended classification system and salary scale outlined by the State Department of Public Instruction for classifying office support personnel. The one exception was the LEA with the largest enrollment. The administrator in that LEA reported to use an outside private firm to develop classification plans.

There is a wide variation in responses as to how job classification for particular positions change. All five administrators reported that an initial request for changing a classification could be made by the employee in the position or the employee's immediate supervisor. In

addition, one LEA administrator indicated that classification could change by an increase in job responsibility and another indicated that classification could change based on labor supply and demand. In all cases, classification changes are approved by one or two top administrators. In two cases, the request is channeled through a committee for a recommendation prior to a final decision by a top level administrator.

The State Department of Public Instruction guidelines for classifying office support personnel have not included size of school or school level (elementary/secondary/central office). However, all five LEAs use these factors in determining classification status. It was reported that all five LEAs had official ranges showing certain school enrollments and/or location of assignments which constituted minimum classification levels.

The five LEAs vary considerably relative to their policies allowing credit for experience in placement on a salary scale for initial employment. Two of the five have no particular guidelines for experience credit, but indicate it is negotiable and depends on the labor supply at the time of employment. One LEA provides credit for previous experience in their administrative unit only. One administrator indicated that their LEA tries to place an employee on a salary scale near the salary they have been receiving in a similar position. One administrator reported

that their LEA allows credit for aggregate state experience with any public school in the state and allows one year of experience credit for every two years worked in a similar position outside North Carolina public schools or in private business.

All five administrators indicated that education above the minimum requirement for the position does not make any difference in salary placement on entry level employment. None of the LEAs have any policies or procedures that specify promotion or salary change based on attaining more education while on the job. However, all five administrators implied that attaining more education appropriate for the position was an important factor when an employee is considered for a promotion.

Opportunities for advancement and promotion of office support personnel in all five LEAs are limited basically to an employee applying for a higher classification level position when there is a vacancy. Each of the administrators reported that vacancies in their LEAs are announced along with the information on classification and salary in order for all employees to have an opportunity to apply.

Four of the five LEAs use an LEA developed appraisal instrument, completed by the immediate supervisor, for appraising the performance of office support personnel. The other LEA requires each immediate supervisor to appraise

office support personnel by submitting a written appraisal in narrative form. The administrator in only one LEA reported that the appraisal of performance affected pay. The other LEAs have no form of a merit pay system for office support personnel.

The last question in the interview was an opinion question for the administrators. Each was asked to give his views on whether or not they perceived there to be a uniformity issue in the classification of office support personnel, within their respective LEAs and within the state. All five administrators indicated that they felt an internal uniformity issue existed and four of the five considered a uniformity issue to exist statewide. The consensus opinion was that more structure is desired by the LEA from the state department in classification of office support personnel, while retaining maximum flexibility with the LEA.

Summary of Chapter

Chapter 4 presented the analysis of data. A questionnaire was developed in which two types of data, in addition to demographic data, were sought. The first type of data from the returned questionnaire provided information regarding the current status of classification/salary administration of office support personnel in local school systems. The second part of the survey examined the

perceptions of administrators relative to classification and various other aspects of salary administration of office support personnel.

Demographic data were obtained from the questionnaire and were analyzed for possible correlations with the other findings. The only statistically significant finding was the relationship between the LEA size of student enrollment and the number of office support personnel employed. There was a representative return from large and small LEA enrollments, educational districts (representing regions of the state), city and county administrative units and both rural and urban LEAs.

An analysis of the current status questions revealed the superintendent to be the administrator most responsible for the classification/salary administration of office support personnel. The majority of office support personnel were classified in the first three levels of the five state classification levels. The criteria most often used for determination of classification levels was matching job description with state job classification level descriptions. The interview and observation methods were the two methods most often used for collecting job classification information.

The administrators' perceptions regarding various aspects of classification/salary administration and

performance appraisal were analyzed. The findings indicated that the majority of administrators felt that LEAs should determine their own classification status for their classified personnel. They feel there should be a standardized performance appraisal instrument and performance-based pay. They also reported that salaries of office support personnel were slightly lower than the local business community.

The findings and interpretations of data collected in the interviews were used to extend data from the questionnaires. Additional data were also derived relative to whether or not the LEA had written, up-to-date salary administration policies and/or procedures. Data were also obtained on how salary administration procedures dealt with initial appointment, promotion, reinstatement, transfer and reclassification. Finally, opinions were solicited relative to whether or not the administrators perceived equity issues in the procedures for classification of office support personnel within the LEA and among LEAs within the state. The majority of the administrators indicated that they perceived equity issues to be present in both their LEA and the state.

CHAPTER 5

SUMMARY, CONCLUSIONS AND RECOMMENDATIONS

Introduction

The research addressed in this study analyzed the current status of classification/salary administration systems for office support personnel in the public schools of North Carolina. In addition, the research focused on the perceptions of administrators regarding various aspects of salary administration and performance appraisal for office support personnel. A questionnaire was developed to collect data in both these areas of research as well as demographic data. The questionnaires were sent to the 140 local education agencies (LEAs) in North Carolina. The responses came from 107 returned questionnaires. To determine the current status of classification/salary administration systems for office support personnel, the following questions were asked:

1. Who is most directly responsible for classification/salary administration of office support personnel?
2. How many office support personnel positions are in each of the state job classification levels?
3. How many office support personnel positions are funded by state funds? Federal funds? Local funds?
4. What are the criteria used for determination of classification levels?

5. What methods are used for collecting job classification information?

For the administrators' perceptions regarding various aspects of classification/salary administration, the following survey questions were asked:

1. Who should evaluate individual jobs to determine appropriate job classification levels?
2. Should there be a statewide standardized appraisal instrument for performance appraisal of office support personnel?
3. Should there be a performance-based reward system (merit pay) for office support personnel?
4. How do office support personnel salaries compare with similar positions in the business community?

Further study of the current status of classification/salary administration was done by interviews in five selected LEAs. Along with several general questions, each administrator responsible for salary administration was asked the following questions:

1. Does the LEA have up-to-date, written salary administration policies; and if so, are they available to employees?
2. How do salary administration procedures deal with the following:
 - a. initial appointment,
 - b. promotion,
 - c. reinstatement,
 - d. transfer, and
 - e. reclassification?
3. How are office support personnel appraised for performance?
4. How does appraisal of performance effect pay?

Summary of Findings and Discussion

Results from this study indicated that a variety of procedures and methods for classification of office support personnel were used throughout the public schools of North Carolina. There were no data found which allowed for predicting particular procedures and/or methods of classification based on the size of student enrollment, educational district, type administrative unit or LEA description. These differences seemed to have no significant impact on how an LEA classified office support personnel positions.

From the returned questionnaires, the data indicate that the superintendent is the administrator most frequently involved in classification of office support personnel. Apparently, this is the case no matter whether classification is handled by a single administrator or if the responsibility is shared between two administrators. One explanation for a greater involvement from the chief school administrator may be that a larger number (57) of the responses came from LEAs with student enrollment of less than 5,000; therefore, the superintendent in small LEAs may have more direct involvement in all personnel matters than do those in larger LEAs. Another possible explanation may be that positions directly under the superintendent, although very similar in function and duties, have had a tendency to take on a variety of

titles. Thus, an assistant superintendent in one LEA may have about the same responsibilities as a director of personnel in another LEA. As a result, data from the returned questionnaires identify a variety of titles for positions other than the superintendent. Still another possibility may be that classification of personnel for salary purposes is a matter of high importance and ultimately requires direct approval of the superintendent. Verification of this latter explanation seemed apparent from the interviews, since in each case the interview was conducted with someone other than the superintendent, but in the majority of the cases, it was reported that the final approval for classification decisions rested with the superintendent.

The data also suggest that, next to the superintendent, the finance officer is the one administrator most directly involved with classification of office support personnel. This fact indicates that classification procedures are most dependent upon the financial status of the LEA. The finance officer is the administrator more likely to be more aware of the LEA's financial status. Realistically, the classification of an office support position (placement on the salary scale) may depend as much or more on the amount of money available for the position as it does on the

evaluation of the responsibilities and duties assigned to that position.

The data show that LEAs use mostly state and local funds with very little federal funds used for employing office support personnel. Federal funds for office support personnel positions are limited to funding those positions specifically included in Federal Programs. LEAs used local funds to employ office support personnel positions at lower classification levels. A greater number of positions are classified at the lower classification levels than were classified at Levels IV and V, where all LEAs had 10 or fewer positions. It is not known if this is a result of there being a greater number of lower level positions because duties and responsibilities were less for the majority of positions or because limited funding prevented having more positions at higher classification levels.

According to the information from the returned questionnaires, more LEAs used the criteria of matching local job descriptions with state job classification level descriptions than any other criteria for determining classification levels of individual positions. This implies that a majority of LEAs are familiar with the guidelines for classification from the State Department of Public Instruction. The data from the interviews supported this

finding also since four out of five of the LEAs involved were reported to have followed state guidelines.

Subsequent data from the interviews revealed that in those LEAs, classification of office support personnel depended on several factors other than measures referred to in the state guidelines. A small number (9) of the LEAs responding to the questionnaires had listed other procedures, which included a variety of criteria. However, these other criteria appeared to be rather insignificant when considered with the majority of other responses from the questionnaires. From the interviews, however, there was considerable evidence that in the five LEAs studied, classification of office support personnel depended very much on other factors. For example, in all five interviews, it was reported that the LEA had different classifications for office support personnel assigned to a school, based on the size of student enrollments. Employees working in elementary schools were classified differently than those working in secondary schools, even though the assignment of duties and responsibilities may have been very similar. Employees assigned to the central office were often classified at a different level than those at the school level. From the interviews, it seemed evident that these criteria were used for assignment purposes as much as other state suggested criteria.

The implication from the interviews was that classification of office support personnel may be based upon an assumed degree of difficulty for certain tasks as much or more than on actual measures of assignments and responsibilities. The assumption seems to be that the size of student enrollment or grade levels of the school where the employee worked; or the fact that the employee works at the central office rather than at a school were all criteria used for classification purposes.

It appears, without exception, that the highest classification levels of office support personnel in the LEAs are assigned to employees in the central administrative office. This fact poses a question of whether or not these jobs entail the most difficult or complex duties and responsibilities or whether some other factor may be operating. The implication is that office support personnel may be classified to match the level or title of their immediate supervisor. It may be that since the administrators most directly responsible for classification of office support personnel are more familiar with those personnel with whom they depend on for their own clerical assistance; they are more likely to rate their responsibilities higher than those with whom they were not personally familiar.

The data from the returned questionnaires indicate that a majority of administrators collect job classification information through interview and observation. This implies that administrators use a more informal approach such as simple observation and talking with employees (interview) for job classification information. The questionnaire method implies a more formal method (written form).

Finally, the data from the returned questionnaires indicate that the majority of administrators believe their LEAs should determine classification status, should use a standardized performance appraisal instrument; and should implement a performance-based reward system (merit pay). The implication is that those administrators desire some statewide consistency in performance appraisal instruments and merit pay; and at the same time, desire flexibility in determining how to classify and pay their employees.

There was a wide discrepancy in opinions about how salaries of office support personnel compare with the business community. However, these differences had no patterned relationship with different regions in the state, size of LEAs or city versus county units. Although, 49 administrators indicated salaries to be slightly higher, this finding may indicate that administrators directly responsible for classification/salary administration had a tendency to consider their employees to be well compensated since that

was a direct reflection on their performance as salary administrators.

Data derived from the five interviews indicate that one LEA has board policies and three have written administrative procedures for classification/salary administration of classified personnel. It seems apparent that, in spite of written policies or procedures, transfers or classification changes (reclassification) are often times dependent on some criteria other than changes in duties and responsibilities. Such decisions are most often made by one or two top level administrators. These decisions may be based on supply and demand or a minimum salary an employee would accept.

It also seems evident that most LEAs have some established procedures or guidelines relative to where to place a new employee or to reinstate an employee on a salary scale based on experience and/or education. It was not evident that most LEAs have any type of staff development activities or self-improvement incentives that would encourage or reward personal/professional development.

The data from the interviews suggest that opportunities for advancement and promotion for office support personnel are limited to applying for openings at higher classification levels. This implies no advancement once an employee is placed in classification Level V.

Most LEAs have developed and used a performance appraisal instrument for appraising the performance of office support personnel. However, there was only one LEA in which the administrator reported having merit pay. The implication reached after interviewing the administrators was that most LEAs would need an improved performance appraisal instrument if it were to be used to document and justify differential pay.

All the administrators interviewed indicated that classification/salary administration of office support personnel in North Carolina public schools involves uniformity issues. All five administrators felt there were uniformity issues within their own LEA and all but one felt there were uniformity issues among the LEAs within the state. The implication is that the uniformity issue is based on the inconsistency in the implementation of salary administration policies and procedures.

Conclusions

In conclusion administrators want structure for consistency from the state department; but they also want to maintain flexibility as they implement their own LEA classification/salary administration policies and procedures. This desire for both flexibility and consistency creates frustration for practicing administrators.

Inconsistency may be the greatest cause for the uniformity issues to exist. A second conclusion is that this study verified the inconsistencies in procedures and methods used among LEAs for classification. It is also believed that inconsistency is the greatest cause for uniformity issues to exist within the LEAs. Too many times classification levels are limited by available funds while the explanations for classification determination reveals other reasons. It is believed that with many office support personnel positions, the classification level is determined by the position rank of the employee's immediate supervisor; and therefore, not based on job descriptions and job responsibilities. It is also believed that a few obvious examples of unequal treatment in determining the classification status perpetuates a uniformity issue among employees and their supervisors.

A third conclusion is that career minded office support personnel become disenchanted by a lack of advancement and promotion opportunities. In fact, there appears to be very little incentive to do a better job simply because there are no indications that doing a good job leads to a promotion, better working conditions, or an increase in pay. Consequently, performance appraisal must become a common practice among classified personnel. At least some part of salary increases need to be linked to performance appraisal.

A final conclusion from this study is that uniformity issues can be curtailed if classification/salary administration policies and procedures are implemented with consistency and with clear and concise explanations. For this reason, this study proposed some recommendations for LEAs to follow in their classification/salary administration policies and procedures for office support personnel.

Recommendations

1. The local board of education should have a simply stated policy referring to administrative procedures which shall be developed, updated and followed in the process of classification/salary administration for all classified employees.
2. Administrative procedures should be developed which outline salary administration rules and the implementation of the salary plan for all classified personnel.
 - a. Copies of the administrative procedures should be accessible for all employees by designating specific locations at each job site (schools, central office, maintenance shop, etc.) where they can be seen.
 - b. The administrative procedures should define and explain the process of job classification; how jobs are orderly arranged and fairly evaluated for making that determination.
 - c. The administrative procedures should include and specify in the salary administration rules the following topics:

- (1) initial placement on salary schedule
 - (a) experience
 - (b) education
 - (c) skills based on objective tests
 - (2) placement on salary schedule for reinstatement or re-employment
 - (3) progression of employees through a classification salary range
 - (4) transfer from one classification to another by administrative transfer and by employee request
 - (5) promotion to a higher classification
 - (6) review of jobs for reclassification
 - (7) reclassification of jobs
 - (8) performance appraisal and merit pay
 - (9) appeal process for a classification or salary determination decision.
- d. The administrative procedures should be reviewed periodically and modified to meet changing concerns for equity, competitiveness, legality, and motivation.
3. The LEA should adopt State Department of Public Instruction's guidelines and class descriptions for classification levels as a foundation on which to develop LEA classification procedures.
 4. The LEA should follow salary schedules developed by the State Board of Education, Division of the Controller, as a base salary. Any additions to the base salary should be treated as a supplement provided by the LEA.
 5. The LEA should develop flow charts for each classified employee group, such as office support personnel.

- a. Flow charts should show all current positions for that employee group by title and classification status.
 - b. Flow charts should be updated annually.
 - c. Copies of flow charts should be located with copies of administrative procedures.
6. The LEA should establish a Classification Committee, with representation from various categories of classified employees and various levels of administration to be chaired by the administrator responsible for classified personnel. This committee should act in an advisory capacity only and function primarily for the purpose of communicating the concerns of classification/salary administration between the administration and the classified employees.
 7. The LEA should conduct annual surveys or check the labor market data to keep abreast of current salaries for similar positions in the business community within the geographical area of the LEA; and be prepared to respond to competitive market value changes.
 8. The local board of education should implement a performance appraisal system that can justify and support merit pay for all classified personnel. (Appraisal system must focus on job-related tasks)
 9. The LEA should develop incentives to promote staff development activities for all classified personnel to

improve their work skills and outline ways in which such improvement can broaden their career opportunity.

10. The LEA should emphasize fairness and uniformity of treatment.

Recommendations for Further Study

1. Additional research is needed in the area of classification/salary administration for all classified personnel in the public schools. Research is needed relative to the number of positions in each LEA, salaries and fringe benefits provided for these positions, source of funding and LEA developed job descriptions. This additional research will allow for more valid and defensible salary administration policies for all classified personnel within the 140 LEAs across the state of North Carolina.
2. Additional research is needed that would collect data relative to the perceptions of employees toward classification/salary administration of their positions. It would be interesting to compare the opinions of administrators who classify with employees who receive the classification. Some common concerns for uniformity issues may be discovered, and thus, possible solutions which satisfy administrators, employees and boards of education may evolve.

3. Additional research is needed to determine if the recommendations which have been developed in this study are useful to administrators and boards of education responsible for classification/salary administration of classified personnel. This research will focus on LEA efforts to develop, modify and/or update classification/salary administration policies for classified personnel.

Summary

This chapter briefly summarized and discussed the findings of the study, formulated some conclusions, presented some recommendations for developing classification/salary administration policies and presented recommendations for further study. The recommendations for developing policies were developed to assist superintendents and boards of education in the public schools of North Carolina as they prepare salary administration policies for classified personnel. It is intended that these recommendations be a skeleton for developing those policies. It is up to each LEA to determine what should be added to this skeleton.

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APPENDIX

April 3, 1986

Dear

The attached open-ended questionnaire concerned with salary administration of office support personnel is part of my dissertation study at Virginia Polytechnic Institute and State University. The project is concerned specifically with determining the status of the classification of office support personnel by local school systems in North Carolina. The results of this study will help superintendents and boards of education to develop better salary administration policies for their school systems.

You are among a small sample of subjects to receive this open-ended questionnaire which will provide the data from which an objective-type questionnaire will be developed to send to each superintendent in all 140 school systems throughout the state. I am particularly desirous of obtaining your responses because your experience in working in salary administration will contribute significantly to the development of an objective-type questionnaire best suited for this study.

It will be appreciated if you will respond to the questionnaire by April 18 and return it in the stamped envelope enclosed. Complete anonymity will be observed regarding your response. I would welcome any comments that you may have concerning any aspect of salary administration for office support personnel or specific suggestions you may have for the development of my objective-type questionnaire. Thank you for your cooperation.

Sincerely,

G. Frank Sells

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Enclosures

Open-Ended Questionnaire
 SELECTED NORTH CAROLINA PUBLIC SCHOOL ADMINISTRATOR'S SURVEY
 REGARDING SALARY ADMINISTRATION OF OFFICE SUPPORT PERSONNEL

1. What is the total number of personnel employed in your school system? _____
2. How many of the above are non-certified personnel?

3. Within the total number of non-certified personnel, how many are classified as office support personnel?

4. Indicate the number of office support personnel in each of the state job classification levels.
 Level I ___ Level II ___ Level III ___ Level IV ___
 Level V ___
5. How are the state job classification levels for office support personnel positions determined?
6. Within the office support job classification levels, what factors determine salary steps?
7. Who classifies office support positions for your school system?
8. Briefly describe or attach a copy of your board policies or administrative procedures for salary administration for office support positions in the following areas:
 - initial appointment -
 - transfer -
 - reinstatement -
 - promotion -
 - reclassification -

9. Should the LEA or the State Agency establish classification levels for office/support personnel positions in the LEA?

LEA _____ State Agency _____

Why?

10. Should the State Agency develop a performance evaluation instrument for evaluating office support personnel?

yes ____ no ____ Why or why not?

11. Should there be a merit pay system for office support personnel?

yes ____ no ____ Why or why not?

12. Would you favor the State Personnel Commission's endorsement of the Hay Study recommendation concerning performance incentives (merit pay) in which state funds would be provided on an average two-thirds of the eligible employees above step 3 on the salary schedule for one-step salary increases each year?

yes ____ no ____ Why or why not?

13. Please add any additional comments, suggestions, or concerns relative to the salary administration of office support personnel positions. Feel free to add any other examples of questions that should be included on a questionnaire to be sent to all LEAs.

Dear

The attached questionnaire concerned with salary administration of office support personnel is part of my dissertation study at Virginia Polytechnic Institute with determining the status of the classification of office support personnel by local school systems in North Carolina. The results of this study may help superintendents and boards of education to develop better salary administration policies for their school systems.

This questionnaire is being sent directly to central office administrators with responsibilities in the area of personnel, with a copy to superintendents. If someone else in your LEA is more responsible for salary administration of office support personnel, please refer this letter and questionnaire to them.

It will be appreciated if you will respond to the questionnaire by July 18th and return it in the enclosed self addressed, stamped envelope. Complete anonymity will be observed regarding your responses. I would welcome any comments that you may have concerning any aspect of salary administration for office support personnel. Thank you for your cooperation.

Sincerely,

G. Frank Sells

kg

cc Superintendent

Enclosure

(Please answer the following by completing or selecting the best response to describe salary administration of office support personnel in your LEA)

1. What is the number of office support personnel employed in your LEA? _____

2. In reference to the above question, how many are funded by:
State Funds _____ Federal Funds _____ Local Funds _____

3. Indicate the number of office support personnel in each of the state job classification levels for your LEA.
Level I ___ Level II ___ Level III ___ Level IV ___
Level V ___

4. How is the job classification level for each office support position in your LEA determined?

____ by matching local job description with state job classification level description
____ by an initial placement study by the Local Education Agency
____ by an initial placement study by the State Department of Public Instruction
____ by job experience
____ other (please explain)

5. What methods are used to collect job classification information for office support positions?

____ questionnaire method
____ interview method
____ observation method
____ other(s) (please explain)

6. In your opinion, should the LEA or the State Agency evaluate individual jobs to determine the appropriate state salary level?

LEA _____ State Agency _____
Neither _____ Both _____

7. In your opinion, should the State Agency develop a standardized performance evaluation instrument for evaluating office support personnel?

yes _____ no _____

8. In your opinion, should there be a performance-based reward system for office support personnel?

yes _____ no _____

9. In your opinion, how do salaries for office support personnel in your LEA compare with similar positions in your business community?

___ much higher than the business community
___ slightly higher than the business community
___ slightly lower than the business community
___ much lower than the business community
___ about the same as the business community

*Please return this questionnaire in the enclosed, self-addressed stamped envelope by July 18, 1986.

111

August 15, 1986

G. Frank Sells

Dear Superintendent:

The attached questionnaire concerned with salary administration of office support personnel in North Carolina public schools is part of my dissertation study at Virginia Polytechnic Institute and State University. This study is concerned specifically with determining the present status of the classification of office support personnel. The results of this study will help superintendents and boards of education implement better salary administration policies for office support personnel.

You should have received a copy of the questionnaire a few weeks ago. I am sure you intended to return the questionnaire but perhaps, with your busy schedule, you have overlooked doing so. You were asked to complete the questionnaire or refer it to a staff member who may have more direct responsibilities in this area. Perhaps this person has overlooked returning the questionnaire.

This study is important for all school systems in North Carolina and I strongly value your contribution to the study. It will be appreciated if you will complete the questionnaire or see that it is completed prior to September 10 and return it to me in the self-addressed, stamped envelope. Other phases of this research cannot be carried out until analysis of the questionnaire data are completed.

I would welcome any comments that you may have regarding any aspects of this study. I will be pleased to send you a summary of questionnaire results if you desire. Thank you for your cooperation.

Sincerely,

G. Frank Sells

kg

Enclosure

School System: _____

Person Interviewed

Name: _____

Title: _____

Date: _____

Interview Questions

1. Explain your system's policies on salary administration for non-certified personnel. Eg. are there specific policies adopted by the board? Are they reviewed frequently and kept up-to-date? Are copies of the policies available for employees?, etc.

2. How closely do your salary administrative policies follow the classification system and salary scale outlined by the state department for your office support personnel?

3. How are office support positions evaluated? Job classification system, rank method, point system, factor method, or other?

4. How do you prevent "padding" of job descriptions or other acts of favoritism in order to qualify a well liked employee for a higher position.

5. How do job classifications for particular positions change?

6. Do such factors as size of school, central office position, etc., play a role in classification and/or salary schedule placement?

7. How do you deal with experience, education, etc. on entry level hiring of office support personnel?

8. What are the career opportunities for advancement and promotion for office support personnel?

9. How are office support personnel evaluated?

10. How does evaluation of performance effect pay?

11. Is there an equity issue on the classification of office support personnel positions within the state? Within your system? Explain.

Number of Office Support Personnel

Enrollment	1-10	11-20	21-30	31-40	41-50	51+
0-5,000	21	24	11		1	
5,001-10,000		1	7	10	6	3
10,001-25,000	2				3	15
Over 25,001	1					2
<u>Chi-square</u>	<u>D.F.</u>	<u>Significance</u>				
124.69037	15	0.0000				

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