



Montana public school superintendents : a demographic study and a forecast for the future  
by John Jay Erdie

A thesis submitted in partial fulfillment of the requirements for the degree of Doctor of Education  
Montana State University

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Abstract:

This study identified the relationship that exists among public school superintendents and selected variables based upon the classification of the school district that they are employed in. The study also determined the manpower needs for the position of district superintendent in the state of Montana through the year 2000.

The population for the study consisted of 188 public school superintendents employed in the state of Montana during the 1986-1987 school year. The data were collected using a modified instrument developed by the American Association of School Administrators.

Chi Square Test of Independence at the .05 level of significance was used to analyze the statistical hypotheses. The analyses indicated that there was a significant relationship between eleven of the variables and school district classification. They were: Age of the superintendent; Prior administrative experience; Mobility patterns of first superintendency; Total years of educational experience; Salary received by superintendents; Length of superintendents' contracts; Educational preparation of superintendents; Decentralizing large districts; Reorganizing smaller districts into larger units; Maintenance of effective in-service programs and Professional memberships that superintendents hold.

Based upon the data, the following conclusions were drawn: Class III school districts have the youngest superintendents; Aspiring superintendents will enhance their employability by first becoming building principals; Class III superintendents have less continuous years of employment than do the other two classifications; Class I superintendents have more total years of experience, a longer employment contract, higher levels of formal preparation, higher salaries, a need to maintain effective in-service programs and are more concerned about decentralization than are Class II and III superintendents; Reorganizing smaller districts into larger ones was not an issue of concern to Class I superintendents; Professional membership for Class I superintendents was equally distributed among AASA, ASCD and PDK; and notwithstanding other variables, better than 50 percent of the practicing superintendents will reach minimum retirement age in the next 12 years.

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A thesis submitted in partial fulfillment  
of the requirements for the degree

of  
Doctor of Education

MONTANA STATE UNIVERSITY  
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APPROVAL

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John Jay Erdie

This thesis has been read by each member of the thesis committee and has been found to be satisfactory regarding content, English usage, format, citations, bibliographic style, and consistency, and is ready for submission to the College of Graduate Studies.

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## ABSTRACT

This study identified the relationship that exists among public school superintendents and selected variables based upon the classification of the school district that they are employed in. The study also determined the manpower needs for the position of district superintendent in the state of Montana through the year 2000.

The population for the study consisted of 188 public school superintendents employed in the state of Montana during the 1986-1987 school year. The data were collected using a modified instrument developed by the American Association of School Administrators.

Chi Square Test of Independence at the .05 level of significance was used to analyze the statistical hypotheses. The analyses indicated that there was a significant relationship between eleven of the variables and school district classification. They were: Age of the superintendent; Prior administrative experience; Mobility patterns of first superintendency; Total years of educational experience; Salary received by superintendents; Length of superintendents' contracts; Educational preparation of superintendents; Decentralizing large districts; Reorganizing smaller districts into larger units; Maintenance of effective in-service programs and Professional memberships that superintendents hold.

Based upon the data, the following conclusions were drawn: Class III school districts have the youngest superintendents; Aspiring superintendents will enhance their employability by first becoming building principals; Class III superintendents have less continuous years of employment than do the other two classifications; Class I superintendents have more total years of experience, a longer employment contract, higher levels of formal preparation, higher salaries, a need to maintain effective in-service programs and are more concerned about decentralization than are Class II and III superintendents; Reorganizing smaller districts into larger ones was not an issue of concern to Class I superintendents; Professional membership for Class I superintendents was equally distributed among AASA, ASCD and PDK; and notwithstanding other variables, better than 50 percent of the practicing superintendents will reach minimum retirement age in the next 12 years.

## CHAPTER I

## INTRODUCTION

In the public school system, few employees in the district have more visibility than the superintendent of schools. During the school year, events occur when other employees draw the attention of the media and the public for various reasons but in a majority of districts, the superintendent is the person who represents the school district. Formal images of the role of superintendent are not hard to identify according to Blumberg (1985). These images are often observable in recruiting brochures that are published by most school districts when conducting a search to fill the vacancy for superintendent. He suggested that the superintendent's job can be divided into four parts: (1) improving educational opportunity, (2) obtaining and developing personnel, (3) maintaining effective relations with the community, and (4) providing and maintaining funds and facilities. Dolce (1976) suggested the superintendent of schools tends to be the most visible aspect of a school system and plays a symbolic as well as a management role. Whether or not the superintendent is greatly influential in policy decisions, s/he is perceived to be influential. The superintendent is

an easy symbol for accolade or disapproval and is associated with the weaknesses and strengths of the district as well as the management of all employees, students and facilities. Metaphorically speaking, superintendents describe themselves as being both a producer and director in a theatrical production, an orchestrator, a coach, a manipulator, a judge and a politician (Blumberg, 1985).

A superintendent is selected by a lay board of citizens who have been elected by the public. Superintendents not only execute policies that are enacted by the lay board but become advisors for that board and other groups in the community. In carrying out the mandates of the board of trustees and acting in the capacity of advisor, the superintendent's ideas are sometimes deemed unacceptable. Consequently, conflicts arise between the board of trustees and superintendents and/or between the superintendents and the community. In analyzing the interrelationship that exists in any school district, Dolce (1976) contended that boards of trustees are really outside of an organization. They represent an institutional function and they represent society. Teachers, principals and assistant superintendents represent the organization. Teachers represent the technical aspects of an organization. Principals and assistant superintendents represent the management aspects.



The position of the superintendent lies between society's representatives, the board, and the organization--teachers, principals and other administrators. Whenever there is a gap between society and the organization, the most fragile point is that of the superintendent.

Burlingame (1977) noted that conflict may force career changes of public school superintendents but not all career changes are the result of conflict or are filled with bitterness. Many superintendents leave a district for reasons other than conflict. Some leave for enhanced salaries. Mobility is characteristic of a career-bound superintendent (Gerardi, 1981). Others depart because they want to be an influencing force in a larger district. Burlingame (1979) found a higher rate of turnover existed among superintendents in Illinois school districts which had enrollments of fewer than 500 students.

Linked into the problem of mobility for superintendents is the issue of supply and demand. Based upon existing mobility patterns, whatever they may be, is the question of whether there are enough certified public school superintendents available to serve today's school districts. Even though public school enrollments have declined, doctoral degree recipients in school administration have increased substantially (Downey, 1985). The need for additional administrators has not been documented. The education profession might be edging

toward disharmony between supply and demand (McCarthy, Kuh & Zent, 1981). While an oversupply of potential job incumbents can have some positive effects on the profession (e.g., strengthening certification requirements and preparation program standards), without sufficient knowledge of supply and demand trends, the profession cannot adequately respond to market changes. The education profession could be on the brink of another personnel imbalance similar to that between teaching positions and qualified candidates which characterized the 1970's. The negative consequences of a disproportionate supply and demand ratio among school superintendents can possibly be avoided if a data-based portrayal of the market situation is made available to interested stakeholders (e.g., potential administration students, employed administrators, preparation program faculty and state department personnel). In a West Virginia study (Martin & Andes, 1979), the supply of school administrators outstripped the demand. The demand or need for administrators included 240 vacant positions as compared to the certification of 325 new public school administrators. McCarthy et al. (1981) found an apparent oversupply of building administrative positions, especially at the elementary level. In a six state study that included California, Georgia, Indiana, Massachusetts, Nebraska and Texas, the only administrative positions for which an increase in demand was indicated

were special education directors/supervisors and supervisors of federal programs. This seemed to be, at the time, related to federal funding priorities.

### Statement of the Problem

Using the school years 1977-1978 through 1986-1987, the problem of this study was two-fold: (1) to determine whether a relationship existed between the dependent variables, school district size, classification and the following factors: tenure, mobility, experience as a superintendent, total educational experience, age, educational preparation, salary, membership in professional organizations, gender, educational issues and future plans of employment; and, (2) to determine the manpower needs for the position of district superintendent in Class I, II and III districts in the state of Montana through the year 2000.

### Need for the Study

Few researchers have spent much time, effort or energy inspecting closely the professional lives of public school district superintendents (Burlingame, 1979). Downey's (1985) statistical analysis of school board members and superintendents speaks for itself. Both groups are among the least studied in the field of education.

Mobility studies of district superintendents and what the future holds for such positions in the state of Montana are non-existent. The state of affairs in a number of states (McCarthy et al. 1981) resulted in data limitations that precluded the formulation of concrete conclusions. The Nebraska state department personnel could provide data only on the number of certified administrators who held positions for the the 1979-1980 school year. In Indiana, certification data have been available only since 1978 because statistics had been combined for the preceding twelve year period. In Indiana, Georgia and Massachusetts, data are recorded by calendar years as compared to California, Nebraska and Texas that utilize fiscal year data. In California, the number of certificates issued each year includes newly certified individuals as well as certification renewals that are required every five years. Consequently, California data reflect an unknown number of persons who are not entering the educational administration availability pool for the first time.

In addition to the varied practices associated with record keeping and certification, there are other variables affecting supply and demand that cannot be assessed accurately. A case in point is that some states had a large number of individuals who were practicing administrators but who did not hold proper administrative credentials (Martin and Andes, 1979). Availability of

personnel from other states and the characteristics of incumbents themselves (professional aspirations, mobility, age, etc.) affected the supply and demand picture. Another variable to consider is the incentives for early retirement. One such incentive is "buying out" an administrator by offering a sizeable sum of money for early retirement. This is a practice that is currently taking place in Alaska.

In summary, McCarthy et al., (p. 9) indicated that...

At the present time, the education profession cannot make enlightened policy decisions based on the current data available from state departments or from various institutions of higher education. Educational policymakers might be reluctant to take action based upon what appears to be incomplete supply and demand data. Both supply and demand are nebulous, elastic concepts, having many of the properties of an invisible gas which expands, contracts and takes different shapes as the result of external forces. Scientific investigations of these concepts without the assistance of sophisticated controls and techniques is therefore hazardous to say the least, all of which may explain why investigators have reported few studies of this nature.

Without sufficient knowledge of supply and demand trends, the profession cannot adequately respond to market changes.

#### General Questions Answered by the Study

This study answered the following questions:

1. Are years of experience in current position for superintendents independent of school district size?

2. Is the chronological age of superintendents independent of school district classification?
3. Is the gender of superintendents independent of school district classification?
4. Are years of prior classroom teaching experience for superintendents independent of school district classification?
5. Is experience, prior to appointment as superintendent, in other administrative or supervisory positions independent of school district classification?
6. Are the mobility patterns of superintendents independent of school district classification?
7. Are total years of experience as a superintendent independent of school district classification?
8. Is total educational experience for superintendents independent of school district classification?
9. Is the salary received by superintendents independent of school district classification?
10. Are the number of states that the superintendent has served as the chief school administrator independent of school district classification?
11. Is the length of the superintendent's employment contract independent of school district classification?
12. Is the non-educational employment of superintendents independent of school district size?

13. Is the career path of superintendents independent of school district classification?

14. Is the educational preparation of superintendents independent of school district classification?

15. Is the degree of satisfaction with course work leading to superintendency certification independent of school district classification?

16. Are the issues and challenges currently facing superintendents independent of school district classification?

17. Are the possible reasons for leaving the superintendency independent of school district classification?

18. Are the inservice programs that superintendents need to maintain their effectiveness independent of school district classification?

19. Are the number of hours per week devoted to the superintendency independent of school district classification?

20. Are the number of evenings devoted to the superintendency in a typical week independent of school district classification?

21. Are the number of Saturdays devoted to the superintendency in a typical month independent of school district classification?

22. Are the number of Sundays devoted to the superintendency in a typical month independent of school district classification?

23. Are the future plans that superintendents have independent of school district classification?

24. Are years remaining for minimum retirement independent of school district classification.

25. Is the membership superintendents hold in professional organizations independent of school district classification?

26. Is the manpower needs for the position of superintendent, through the year 2000, independent of school district classification?

#### General Procedures

This study began with an extensive review of the literature as it related to public school district superintendents and their mobility patterns, continuous employment as a superintendent, size of district(s) served, and manpower needs.

Relative to Montana superintendents and fulfilling the purposes of this study the following tasks were completed:

1. Using the school law book, School Laws Of Montana, 1985, the definition of school district classification sizes--



Class I, Class II and Class III--were established

2. Using Directory of Montana Schools, 1985-1986, all public school districts, both elementary and secondary, having certified superintendents were classified according to definitions of Class I, II and III districts
3. After gaining permission to use a survey developed by the American Association of School Administrators, a field study of the instrument was conducted by asking practicing superintendents to fill out the survey
4. After the beginning of the 1986-1987 school year, 188 Montana certified district superintendents were surveyed using the AASA instrument.

The results of the survey were statistically analyzed and findings presented. From the findings, conclusions and recommendations were drawn for future needs of certified district superintendents in Montana.

Limitations and/or Delimitations

The limitations of this study were as follows:

1. The study was restricted to the state of Montana
2. The study was restricted to district superintendents in Class I, II and III school districts
3. The study was restricted to numbers of certified superintendents who are endorsed to practice in Montana whether or not they have a degree in school administration
4. The study was restricted to the school years 1977-1978 through 1986-1987.

The delimitations of this study were as follows:

1. Change of status of school district classification during the school years 1977-1978 through 1986-1987 as a result of population fluxuations. These population changes will cause a district to be reclassified
2. The study deals with the demand for superintendents and not the supply of superintendents.

Definition of Terms

Activism. A designation for the characteristic of any person or group of being continually busy to no significant end (Good, 1973:8).

Attack. An assault with unfriendly or bitter words (Good, 1973:47).

Career-bound Superintendent. One who has held two or more superintendencies and first became superintendent at an age younger than the median age of all superintendents in the study (Gerardi, 1981:604).

Career Choices. The progress or general course of action that a person chooses, as in some profession or undertaking; the occupation or profession, especially one requiring special training, followed as one's lifework (Good, 1973:79).

Class I School District. A first class district has a (community) population of 6,500 or more (School Laws of Montana, 1985) MCA, 1985, 20-6-201.

Class II School District. A second class district has a (community) population of 1,000 or more but less than 6,500 (School Laws of Montana, 1985) MCA. 1985, 20-6-201.

Class III School District. A third class district has a (community) population of less than 1,000 (School Laws of Montana, 1985) MCA, 1985, 20-6-201.

Decentralization. Delegation of more authority and duties to subordinates (Good, 1973:135).

District Superintendent of Schools. The chief executive and advisory officer charged with the direction of schools in a local school administrative unit, as in district (Good, 1973:571).

Educational Preparation. The total formal preparation that a person has completed in an educational institution; more usually it is understood to include, in addition, the aggregate of his experience in positions involving educational activities (Good, 1973:434).

Employment Contract. A formal agreement, usually in writing, entered into by the employee and the employing authority, stating the salary to be paid and the length of the term of the contract and setting forth general duties to be performed by the employee (Good, 1973:134).

Federal Involvement. Any control exercised by the Federal government (Good, 1973:237).

Inservice. A program of planned activities designed to improve the quality of service rendered by the employee (American Educators Encyclopedia, 1982:268).

Manpower. A portion of the nation's population that is capable of engaging in productive employment. It includes all who are potentially employable (The Encyclopedia of Education, 1971:54).

Militancy. The term applied to the movement of being more effective, having a greater voice in making educational policy and taking collective action to achieve ends (Good, 1973:367).

Mobility. The ability to move oneself from one's present position to one's desired position in another part of the environment (Good, 1973:370).

Mobility Pattern. A mode where one has the ability to move from one's present position to one's desired position in another part of the environment (Good, 1973:30).

Noneducational Employment. Any employment that is performed for purposes other than the discussion of policies, practices and methods related to teaching and operation of a school system (Good, 1973:402).

Place-bound Superintendent. One who holds only one superintendency and has become superintendent at an age older than the median for the entire study (Gerardi, 1981:604).

Professional Organization. A framework of relationship in which the personnel is set up to facilitate the accomplishment of some mission by promoting cooperation and facilitating an effective exercise (Good, 1973:402).

Qualified Teacher. The education, experience and physical, social and mental characteristics of an

instructor that determines his fitness for an educational position (Good, 1973:464).

Race Relations. Any bond or connection that renders one entity in any way relevant to another (Good, 1973:487).

Reorganization. A change in the geographic area included in an attendance area or administrative unit (Good, 1973:490).

Sanction. A principle of morality that urges or makes binding an action; duty or judgment because of consequences (Good, 1973:507).

Student Norms. A single value or range of values constituting the usual performance of students (Good, 1973:388).

Student Values. Any characteristic that is deemed important by a student because of psychological, social, moral or aesthetic considerations (Good, 1973:636).

Supply and Demand. The ratio between the number available and the number of vacancies (Good, 1973:576).

Support Staff. Personnel that perform tasks in a manner that will uphold and strengthen other personnel in achieving results properly expected of each (Good, 1973:553).

Tenure. The length, usually expressed in years, of service in a single position or school system (Good, 1973:594).

Visibility. The degree or extent to which something or someone is noticed (Good, 1973:641).

## CHAPTER II

## REVIEW OF LITERATURE

Introduction

This chapter reviewed the literature of tenure in position and supply and demand of public school superintendents. Under these two major headings are a number of variables that are reflected in the literature.

Tenure In Position

Initial points exist for causes of turnover among superintendents in different sized districts regardless of the time and geographic location. Lutz (1963) distinguished nine major factors related to tenure of superintendents. The first factor identified was district size. Other factors included short tenure of teacher staff, short-term contracts for superintendents, short tenure in prior positions by superintendents, low per-pupil evaluation, and lower quality of external accreditation visits. In interviews with some superintendents, Lutz identified community instability, inadequate living conditions, inadequate community services, partiality by the superintendent to certain board members (overly



supportive as compared to less supportive of others), involvement in board elections and undesirable personality traits in the superintendent as reasons for turnover of superintendents. "Specializing" in building new facilities, closing under-utilized schools, revamping curriculum offerings, and "cleaning house" so a successor may rebuild a district were additional turnover factors suggested by Burlingame (1979). Peters (1978) found two general explanations of superintendent turnover in rural Illinois public schools, personalistic and political issues. Personalistic issues reflected the personal qualities of the superintendent. Such qualities included poor judgment in distinguishing board decisions from those that should be made by the superintendent, failure to keep informed and lack of openness with the board that generated suspicion and distrust. Political issues were the result of social and/or economic changes. Revisions in school policies do not keep pace with the demands of factions requesting change. Failure to coordinate change with this demand frequently results in political involvement by unrepresented elements of the community. The involvement of new political interest groups usually causes resentment among members of the old power structure and, in the end, results in further political segregation. If the new political forces are strong, they will change the composition of the board to represent their values

concerning education. Changing the composition of the board often results in a "new" superintendent.

A variable that influences the tenure of superintendents is how well the administrative style of the superintendent matches the working style of the board of trustees (Katz, 1985). Katz (1985) felt that corporate school boards (boards that are similar to the mythic corporate board that meet in an awesomely impressive boardroom complete with flip charts and computer printouts) had a good matchup with superintendents who were highly task-oriented. The opposite, but nevertheless a matchup, was the board of trustees that acted in a familial manner with a superintendent who was relationship-oriented. The mythic familial board would be a board that gathered in an intimate boardroom and behaved rather like a group of family elders, making decisions for a large, loosely connected clan of cousins, children and in-laws. Mismatches cause conflict and can result in superintendent dismissal. Katz (1985) felt that recognition of these styles could defuse problems and lead to better working relationships between the chief school officer and the board of trustees.

Career-bound versus place-bound career mobility was addressed by Carlson (1972) in looking at superintendents' careers and performance. Career-bound superintendents occupied a higher place in the social order, enjoyed a







































































































































































































































































































































