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## A Study to Determine what Utah Secondary Business Teachers Should Understand About Vocational Funding from the State Level to the School Level

Debbie L. Hymas  
*Utah State University*

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A STUDY TO DETERMINE WHAT UTAH SECONDARY BUSINESS  
TEACHERS SHOULD UNDERSTAND ABOUT VOCATIONAL  
FUNDING FROM THE STATE LEVEL TO THE SCHOOL LEVEL

by

Debbie L. Hymas

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

of

MASTER OF SCIENCE

in

Business Education

Plan B

Approved:

Utah State University  
Logan, Utah

1977

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## CHAPTER I

### INTRODUCTION

The Vocational Education Act of 1963 was designed to eliminate the unresolved problems of the Smith-Hughes Act and the George-Barden Act. The main purpose of the Vocational Education Act of 1963 was to assist the States in strengthening and improving their existing vocational programs. The Vocational Education Act of 1963 has within its structure a plan whereby it is constantly updated. All groups and occupations were included in the Vocational Education Act of 1963, except those who were professionals or working toward bachelor's or higher degrees. "The act requires each State and each community to plan its vocational education programs with an eye always on the changes taking place in the economy and the world of work."<sup>1</sup>

The major thrusts of the 1963 act were incorporated in the Vocational Education Amendments of 1968. However, additional money was appropriated for other purposes. Certain portions of the additional funding were for the following:

1. Special interest groups.
2. States which were developing long-range State Plans with advisory councils.

Definite changes in vocational education were made possible through the Vocational Education Act of 1963 and the Amendments of

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<sup>1</sup>"The Vocational Education Act of 1963," School Life, XXXVI, No. 5 (March 20, 1964), p. 3-12.

1968. These acts motivated the States and the communities to improve their quality of education, specifically in the area of vocational training.<sup>2</sup> "With the vocational education legislation of the sixties, provisions were extended to meet the needs of a nation experiencing scientific and technological expansion."<sup>3</sup>

With the implementation of the Vocational Education Amendments of 1976, some structure changes did take place in the original Vocational Education Act of 1963. However, the administrating of the funds remained basically the same after the Vocational Education Amendments of 1976.

#### Purpose of the Study

This was a study to determine what Utah 1976-77 secondary business teachers should understand about vocational funding from the state level to the school level. Selected Utah vocational directors, business education supervisors, and business teachers specified the areas of vocational funding knowledge needed by Utah secondary business teachers, and ways business teachers can improve their understandings of vocational funding. The results of the interviews were summarized into a vocational funding handbook for Utah secondary business teachers.

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<sup>2</sup>"Effects of Vocational Education on Business Teacher Education," Business Education Forum, XXV, (December, 1968), p. 43-46.

<sup>3</sup>Ibid.

Importance of the Study

Utah vocational leaders, such as Walter Ulrich, State director of vocational education; Lois Anderson, Supervisor of business and distributive education at Granite School District; Gary Lloyd, State specialist in business and office occupations; and Rosamond Demman, vocational director at Salt Lake City School District; believed that it was important for Utah 1976-77 secondary business teachers to understand about vocational funding from the state level to the school level. These Utah leaders further stated that Utah secondary business teachers did not have sufficient knowledge about vocational funding procedures from the state level to the school level.<sup>4</sup> Ulrich stated:

I believe it would be valuable for secondary business teachers (and all vocational teachers) to have a basic understanding concerning the budgeting process from the State to the local agency, to the program. I feel that many of our teachers do not have sufficient knowledge about their individual program budgets and this makes it difficult for them to operate an efficient, effective vocational program.<sup>5</sup>

In fact, these Utah leaders stated that most Utah secondary business teachers had a very limited scope of vocational funding procedures.

A helpful tool in conveying vocational funding information to the Utah secondary business teachers would be a vocational funding handbook for business teachers.<sup>6</sup> Lloyd stated, "A vocational

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<sup>4</sup>Anderson, Lois, Letter of August 14, 1975; Demman, Rosamond, Letter of August 14, 1975; Lloyd, Gary M., Letter of August 14, 1975; Ulrich, Walter E., Letter of August 18, 1975; See Appendix 7.

<sup>5</sup>Ibid., Ulrich

<sup>6</sup>Ibid., Anderson, Demman, Lloyd, Ulrich

funding handbook for business teachers would undoubtedly be helpful to those who had specific interest in vocational funding."<sup>7</sup> Anderson affirms Lloyd's statement by declaring that a vocational funding handbook for Utah business teachers would be an excellent idea.<sup>8</sup> Demman and Ulrich also maintain that a vocational funding handbook for Utah business teachers would be beneficial for the business teachers.<sup>9</sup> These Utah leaders alleged that Utah secondary business teachers would be receptive to a vocational funding handbook.

This study determined what Utah secondary business teachers should know about vocational funding from the state level to the school level. The results of the study were summarized into a vocational funding handbook for Utah secondary business teachers. This handbook should help Utah secondary business teachers gain a better understanding of vocational funding procedures from the state level to the school level. The completed handbook was sent to Gary Lloyd, State specialist in business and office occupations, for possible distribution to Utah secondary business teachers.

#### Related Literature

The Manpower Development and Training Act of 1962, the Vocational Education Act of 1963, and the Anti-Poverty Bill of 1964 were mainly responsible for increasing the number of employable people in the

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<sup>7</sup>Ibid., Lloyd

<sup>8</sup>Ibid., Anderson

<sup>9</sup>Ibid., Demman, Ulrich

United States. The Federal legislation of the 1960's had a definite effect on vocational education. For example, business education, before the Vocational Education Act of 1963, had to be self-supporting or received no Federal aid. The Vocational Education Act of 1963 made possible for a portion of vocational funds to go to business education.<sup>10</sup>

With the Manpower Development and Training Act of 1962, individuals were able to take specific vocational courses in a short period of time to prepare them for existing jobs. A major problem of the Manpower Development and Training Act was that the act did not reach the hardcore unemployed. Amendments were made to solve the problem. The main amendments were basic educational skills preparation for 20 weeks, additional guidance for youth, counseling services available for individuals, and more funds for training allowances for individuals under 22 years of age. An advantage of the Manpower Development and Training Act was the contribution of training or retraining many individuals for specific existing jobs. Business education trainees within the Manpower Development and Training program accounted for one-fifth of the program's trainees in the early stages, and in 1964 about one-third of the trainees.<sup>11</sup>

The main objectives of the Vocational Education Act of 1963 were:

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<sup>10</sup>Bolger, James, "The First 100 Years of Vocational Education," Business Education World, XXXV, No. 1 (September, 1964), p. 13-16.

<sup>11</sup>Bolger, James, "The Forces That Demand Education for Employability," Business Education World, XXXV, No. 2 (October, 1964), p. 35.



1. Vocational and technical programs to meet the changing needs of the labor market.
2. Training programs will be developed to accommodate all levels of ability.
3. Vocational education offered in all kinds of institutions, public and private.
4. Evaluation at every level of responsibility.
5. Ten percent of the vocational funds will each year go to research and development.
6. The establishment of a National Advisory Committee on Vocational Education would control the Federal funds. A State plan must be submitted to the U. S. Office of Education.
7. A work-study program designed to provide employment for students who need money to continue their vocational education program.
8. Residential Schools for youths and the development of area schools.<sup>12</sup>

In the 1963 act, vocational education for business and office occupations was defined:

This program is for persons over 14 years of age who have the ability to profit from instruction. Its purpose is initial preparation, refresher training and/or upgrading of individuals leading to employment and advancement in office careers.<sup>13</sup>

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<sup>12</sup>Bolger, James, "Provisions of the Vocational Education Act of 1963," Business Education World, XXXV, No. 3 (November, 1964), p. 26-29.

<sup>13</sup>Ibid.

Bolger believed it was important for business educators to maintain closer ties with vocational educators in other areas. If business educators wanted to receive the benefits of the 1963 act, they must also have closer ties with the State directors of vocational education. Under the Vocational Education Act of 1963, the State directors had more influence than any other individuals in administering the act.<sup>14</sup>

The Vocational Education Amendments of 1968 authorized Federal grants to States to assist them to maintain, extend, improve existing vocational programs. The appropriation to the States was determined by the allotment ratio, also per capita income was defined. The uses of Federal funds were for secondary and postsecondary vocational education, retraining of adults, disadvantaged, handicapped, construction of area vocational education facilities, guidance and counseling, training in private institutions, teacher training, evaluation, curriculum development, improved State administration, and development of a State plan. Additional funds were provided for special projects, State research coordinating units, and other vocational research.<sup>15</sup>

The 1974-75 Utah State plan for the administration of vocational education gave some insight into the process of vocational funding from the State level to the school level. The State plan conformed

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<sup>14</sup>Bolger, James, "Business Education and the Vocational Education Act of 1963," Business Education World, XXXV, No. 4 (December, 1964), p. 18-21.

<sup>15</sup>National Advisory Council on Vocational Education, "Comparison of the Vocational Education Amendments of 1968 with Legislative Proposals . . ." (April, 1975).

to the requirement established by Public Law 90-576, the Vocational Education Amendments of 1968. The reasons for the development of the Utah State plan were for:

. . . the guidance and direction of public and private education agencies, institutions, and organizations desiring to conduct vocational-technical education programs in the State of Utah.<sup>16</sup>

In Appendix F of the Utah State plan, the formula for determining the distribution of State and Federal funds was described. These funds were commonly called "Part B Other" funds. The remaining "Part B Other" funds after the administrative costs were then split, fifty percent going to secondary and fifty percent going to post-secondary programs. The formula was then used to determine the portion of Federal funds to be allocated to the local secondary school districts. The Part B Other Distribution Formula was:

1. The number of unemployed youth 16 to 18 years of age in the district. This factor was weighted 1.5 and was a measure of disadvantage.
2. The number of children under Aid for Dependent Children, foster children, and neglected and delinquent children in the district. This factor was weighted 1.5 and was a measure of disadvantage.
3. The number of dropouts, grades 9 through 12. This factor was weighted 1.5 and was a measure of disadvantage and vocational needs.
4. Total school ADM enrollment grades 9 through 12. This factor was weighted 1.00 and is a measure of vocational need.<sup>17</sup>

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<sup>16</sup>Utah State Board for Vocational-Technical Education, Utah State Plan for the Administration of Vocational Education (1974-75), p. 3.

<sup>17</sup>Ibid., p. 98

To receive any of the "Part B Other" funds, a school district must submit a five-year plan and program to the State Board for Vocational Education. An outline of a five-year plan and program would contain the following sections and sub-sections:

- I. Educational Problems of Community
- II. Summary of Vocational Programs Proposed
- III. Enrollment Data
  - A. Total School Population
  - B. Enrollment in Relevant Curricula
  - C. Target Population
- IV. Estimate of "handicapped" and "disadvantaged" in Public Schools and in Private Schools
  - V. Advisory Committee
  - VI. Plan Formulation

Under the last section: Plan Formulation, a five-year plan and program should be "developed in consultation with all representatives of the educational and training resources available to the area."<sup>18</sup>

If a school district met all of the requirements of a five-year plan and program, the district should then qualify for part of the remaining "Part B Other" funds based on the distribution formula. "The funds allocated for a district was the percentage its vocational weighted enrollment is of the total secondary vocational weighted enrollment times the amount of money available for allocation."<sup>19</sup>

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<sup>18</sup>Ibid., p. 133-137

<sup>19</sup>Ibid., p. 34, 98

## CHAPTER II

## METHODS AND PROCEDURES

The reason for this section was to indicate the methods and procedures used to accomplish the objectives set forth in the purpose of the study, on page 2. In-person interviews, telephone interviews, and questionnaires were the main methods used to develop a workable collection of data from the vocational directors, business education supervisors, and business teachers. The data or information was summarized after reviewing notes taken from oral interviews and listening to interview tapes. It was necessary to make several summarizations throughout the interview process. The individuals being interviewed, especially the vocational directors, would introduce new information which made previous interview questions obsolete. The main procedures were the collection of summarized vocational funding information and the development and refining of a vocational funding handbook for business teachers.

An interview guide directed towards vocational directors and business education supervisors was used to determine what Utah vocational directors and business education supervisors believed were important areas of vocational funding knowledge needed by Utah secondary business teachers. A copy of the interview guide is found in Appendix 2. A sample copy of the interview guide, known as a pilot study, was shown to a business educator. The educator was asked various questions related to the content and ease of under-

standing of the proposed interview guide. The educator believed that the questions were worthwhile, and that the guide could be easily understood by others. The pilot study of the interview guide was conducted to insure validity and clarity of the guide before the actual collection of the official data. Five Utah vocational directors and business education supervisors were selected from the Wasatch Front to respond to questions from within the interview guide.

At the first of the interviews with the vocational directors and business education supervisors, a brief narrative preceded the guide questions. The narrative is located in Appendix 1. At which time, the vocational directors should have understood the purpose of the study and the reason for the interviews. The interview guide questions designed for the vocational directors and business education supervisors followed the narrative.

All five vocational directors' and business education supervisors' responses to the guide questions were summarized. The results were then used to develop a new set of interview guide questions for selected Utah secondary business teachers.

The revised interview guide for Utah secondary business teachers is in Appendix 4. The restructuring of the interview guide was designed to stimulate additional discussion by the Utah secondary business teachers. Five Utah secondary business teachers from the same school districts as the vocational directors and business education supervisors sampled were selected to respond to the guide questions. The aforementioned vocational directors and business education supervisors were asked to give their recommendations as

to the business teachers within their districts, that to some degree had a background in vocational funding matters. The business teachers suggested by the vocational directors and business education supervisors were selected to be interviewed for this study.

The responses of the five business teachers were obtained through written correspondence and through telephone conversations. An introductory letter preceded the guide questions intended for the business teachers. A sample of the letter is in Appendix 3. The business teachers then answered the guide questions. Discussion of the guide questions were conducted by phone. The responses of the business teachers were compared to the responses of the vocational directors and business education supervisors.

A further analysis of the summarized responses of the selected vocational directors, business education supervisors, and business teachers was conducted. As a result of this analysis, a rough-draft copy of the vocational funding handbook was developed for the Utah secondary business teachers.

The outline of the handbook was divided into question and answer sections about vocational funding. This type of format was chosen because it appeared to best clarify the vocational funding information that was to be related to the secondary business teachers.

Thus, this rough-draft handbook was sent to the selected vocational directors, business education supervisors, and business teachers enabling them to make any corrections, additions, or comments. All of the comments and suggestions that were received from the vocational directors, business education supervisors, and business teachers were

collated into yet another version of the handbook. Responses to the handbook were favorable, and only minor changes to the handbook were necessary. After reviewing carefully the suggestions and comments, a final-draft of the vocational funding handbook was completed. The handbook is included in this paper as Appendix 8.



## CHAPTER III

## IMPLEMENTATION AND RECOMMENDATIONS

Endorsement of the handbook "What Utah Secondary Business Teachers Should Understand About Vocational Funding From the State Level to the Local Level," by the State Specialist for Business and Office Education should occur to substantiate the value of the handbook for business teachers. After this endorsement or approval has been met, it will be necessary to choose procedures for financing the printing costs of the handbook and for distribution of the handbook to every practicing secondary business teacher in the State of Utah. Possible procedures (some procedures have already been implemented):

1. A letter was sent to the State Specialist for Business and Office Education requesting assistance in financing the printing costs of the handbook. The administrator would also be asked for State aid in the distribution of the handbook. A letter from the business education administrator in response to this procedure is located in Appendix 5.

2. A letter was sent to the President of the Utah Business Education Association and asked if that association would be interested in printing the handbook. The President of UBEA would also be asked to determine the feasibility of distribution of the handbook at the June Vocational Conference. The correspondence on this procedure is found in Appendix 6.

3. If procedures one and two are unsuccessful, then this last procedure should be followed. A letter should be sent to every secondary business teacher in Utah and ask if he would be interested in receiving a copy of the handbook. However, this would be on the stipulation that the business teacher cover the cost of printing for his copy. If the teacher agrees to pay printing and handling costs of the handbook, then a copy of the handbook would immediately be sent to that teacher.

It is further suggested that a follow-up survey of the handbook be conducted to determine the handbook's worth to the business teachers. Through this survey, researching of additional information about vocational funding would be included in a revised edition of the handbook. As in any publication, it will be necessary to have revisions made to the handbook periodically. Constant updating of the handbook would be extremely important to insure the quality and validity of the material.

## CHAPTER IV

## OBSERVATIONS

Vocational directors vary considerably about the management of vocational funds in the district. No discrepancies among the vocational directors existed on how funds come into the district. Each vocational director interviewed stated that every district uses different procedures in the dispersement of funds to the schools. The business teachers should know how decisions are made as to the expenditure of vocational funds in the district. On that basis, the vocational director of a district should make an effort to explain the district budget to the business teachers. However, the methods incorporated by the vocational directors to explain the district budget to the teachers also vary a great deal from one district to another.

Coordinators have been very effectively utilized in several districts within the State of Utah. Some districts disregard the value of coordinators, and they proceed to put the entire responsibility of informing the teachers about funding on the vocational directors. By working with coordinators, the work load of the vocational directors is much less, and the business teachers tend to be better informed about vocational funding matters in the State.

The rapport between the vocational director and the business teachers is important. The vocational director and the business teachers should work as a team, with common goals. Efforts should be made by both to develop and maintain open lines of communication. The

business department head should have the responsibility to see that all of the business teachers in the department are involved in the decision making process. The department head should schedule a department meeting at least once a month to keep the teachers abreast of funding developments in the district. In reference to the "lines of authority" in the district, a business teacher should first go to the department head with any problems. Through the cooperation of the department head, business teachers should feel satisfied that all requests or problems are given due consideration.

Many districts hold at least one meeting a year with all the vocational teachers, coordinators, and the vocational director. At this time, a variety of topics are covered in the discussion. Questions that have perplexed the teachers are usually quickly answered by the vocational director. Overhead transparencies, slides, posters, tapes, and handouts are used to explain the budgeting for vocational funds that would be of interest or importance to the school district. Copies of the State vocational allocations listing funds received by the districts in Utah are given to each of the vocational teachers. The vocational director expresses his objectives for the coming year, and listens to the objectives of the business teachers for the coming year. The vocational director should explain how and why he has made the decision to allocate vocational funds in certain programs. The vocational director should also consider the requests of the teachers. Due dates should be given the teachers for turning in requisitions and proposals.

Most vocational directors contacted encourage business teachers to come and discuss any problems that the teacher might be having in his program. The vocational director will not be offended by sincere questions asked about district policy.

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- Ulrich, Walter E., Letter (August 18, 1975), See Appendix 7.
- Utah State Board for Vocational-Technical Education, Utah State Plan for the Administration of Vocational Education, Parts I & II (1974-75), p. 3, 34, 98, and 133.
- "The Vocational Education Act of 1963," School Life, XXXXVI, No. 5 (March 20, 1964), p. 3-12.

Appendices

Appendix 1Narrative to Precede Interview Guide  
for the Vocational Directors

Mr. \_\_\_\_\_, as you probably know, Rules, Regulations and Procedures is a manual designed to serve as an "instant guide" to vocational directors and operators in organizing and continuing approved vocational programs. In my study, it has been determined that it is very important for Utah secondary business teachers to also understand about vocational funding from the state to the local level. Presently, there is no type of vocational funding manual or handbook specifically designed for Utah secondary business teachers. The purpose of this study is to determine what Utah 1976-77 secondary business teachers should understand about vocational funding from the state level to the school level. The results of the study will be summarized into a vocational funding handbook for Utah secondary business teachers.

As a Utah vocational director, you have valuable insight into vocational funding procedures. Also, you have worked closely with the business education departments in your school district. Therefore, the main purpose of this interview is to obtain your opinions as to the areas of vocational funding knowledge needed by Utah secondary business teachers.

Your responses, along with other vocational directors and business teachers will be tabulated and summarized. A vocational funding hand-



book for Utah secondary business teachers will be developed from the summarized responses.

Appendix 2

Interview Guide of  
Vocational Directors

1. What are the types of vocational funding, which comes from the state or federal government, to the district that would be of importance to Utah business teachers?
2. Would a diagram of the flow of state and federal vocational funds to the district be of any benefit to the business teachers?
3. Do you believe that business teachers should know the kinds of vocational programs for which vocational education monies may be used within a district?
4. A comment of business educators is that they do not know what happens to vocational funds once the funds go to the district. Is there any way that business teachers can find out how much money is coming into a district and into what categories the money is being spent?
5. Who makes the decision as to how the vocational funds in the district will be used?
6. Do vocational funds come to the district during different times of the year?
7. What kinds of vocational funding budgets will an administrative office in a high school have? In a business department?
8. Under the conditions section on page 10 of Rules and Regulations, it states that "state or federal vocational funds can be used when new or additional operating costs are encountered and

students have not generated ADA or FTE support funds." Would new equipment or additional business equipment be considered an additional operating cost?

9. Can FBLA get vocational funding support?

10. If a business department desires funding for additional equipment, projects, etc., what is the procedure for applying for the funds?

11. If teachers within a business department have complaints concerning funds received to support their program, who should they contact for further discussion?

12. Should teachers understand the four parts to the state vocational funding program?

13. What are some of the ways a district might use each of the vocational funds?

14. Which part of the vocational funding program is the most important to business teachers?

15. Salaries of vocational teachers are taken out of what vocational fund?

16. Are there some vocational funding programs in each district that are similar to other districts?

17. What are some of the legitimate ways of spending vocational funds in a district?

18. If vocational funds are available in the district is the district then required to grant the funds to the department?

19. Is there any way that business teachers can find out how much money is coming into a district and into what categories the money is

being spent?

20. How do you explain to teachers that the money they generated, through building up their program, is in part being given to another vocational program?

21. Do vocational departments in a high school usually receive back the money they generated?

22. What are some other misunderstandings business teachers have about vocational funding?

23. What business teacher would you recommend in your district to be interviewed about vocational funding?

Appendix 3Cover Letter to the  
Business Teachers

Dear \_\_\_\_\_:

I am conducting a study to determine what Utah 1976-77 secondary business teachers should understand about vocational funding from the state level to the school level. A vocational funding handbook for Utah secondary business teachers will be developed from the summarized responses of selected vocational directors, business education supervisors, and business teachers.

Would you please complete the enclosed questionnaire and return it to me as soon as possible.

Also, you will find enclosed three questions that will require more than a "yes or no" response. For discussion of these questions I will call you on either Friday the 27th or Saturday the 28th.

In about a week after obtaining your responses to the questionnaire, I will send you a draft of the handbook so you can make any other comments. The handbook needs to be completed in March for possible publication. Thanks for your help! Your opinions are important.

Sincerely,

Appendix 4Questionnaire and Interview Guide  
for the Business Teachers

Questionnaire - please return to:

1. Should teachers understand the four parts to the State vocational funding program (Parts A-D)?  Yes  No
2. Would a diagram of the flow of State and Federal vocational funds to the district to the school be helpful to the teachers?  Yes  No
3. Is it important for teachers to know the procedure and conditions that must be met by the district in order to receive vocational funds?  Yes  No
4. Do you believe that business teachers should know the kinds of vocational programs for which State and Federal vocational education monies may be used within a district?  Yes  No
5. Should teachers know how much money is coming into the district?  Yes  No
6. Should teachers know how the district is budgeting the funds?  Yes  No
7. Should teachers understand how decisions are made as to the expenditure of vocational funds in a district? For example: need or importance of program?  Yes  No
8. In your opinion, do business teachers confuse the generating of funds with the expenditure of funds?  Yes  No
9. Would an explanation of the State formula, average daily attendance and membership and weighted pupil units, be helpful to the teachers? (Included would be the explanation that a large portion of district funds are obtained through W.P.U.'s.)  Yes  No

10. Should teachers understand why students in grades eight through ten are not included in determining the W.P.U.'s? Also, why only certain business classes are considered vocational? \_\_\_Yes\_\_\_No
11. Should teachers know why line item funds transfers in the district program budget cannot continually be made during the year? \_\_\_Yes\_\_\_No
12. Should teachers know how to apply for additional funding for their department? (Included would be an outline on writing a proposal, where to obtain requisition forms, etc.) \_\_\_Yes\_\_\_No
13. Is it important for teachers to know the lines of authority from the department to the district? (For instance, lines of authority would be: department head, principal, coordinator, vocational director, etc.) \_\_\_Yes\_\_\_No
14. Would a coordinator between the teachers and the vocational director be a positive influence in the district? \_\_\_Yes\_\_\_No

Interview Guide - Questions that were covered in the telephone conversation:

1. How could a business teacher become better informed about the vocational funding process from the State level to the school level?
2. What are some of the ways you have received information about funding from your district?
3. What are some of the other vocational funding areas, not covered in the questionnaire, that should be clarified for the business teachers?

Appendix 5Letter from the State Business Administrator  
About Printing Funds for the HandbookUTAH STATE BOARD OF EDUCATION  
UTAH STATE BOARD FOR VOCATIONAL EDUCATION

250 East Fifth South Street, Salt Lake City, Utah 84111

WALTER D. TALBOT, STATE SUPERINTENDENT OF PUBLIC INSTRUCTION

March 8, 1976

Debbie L. Hymas  
665 North 100 West  
Apartment #4  
Brigham City, Utah 84302

Dear Debbie:

Your letter was received and I look forward to having the opportunity to review the final draft of your handbook concerning secondary business teachers' understanding of vocational funding.

I am sorry that we have no funds this year to assist you in the underwriting of the handbook, but would be pleased to assist you in any way as far as the distribution of the handbook to business teachers within the state.

Let me know at your earliest convenience when the handbook will be completed. I look forward to reviewing it.

Sincerely,

GARY M. LLOYD, State Specialist  
Business and Office Occupations

GML/lp



Appendix 6Letter to and from the UBEA President  
About Printing Funds for the Handbook

Elizabeth Gillard  
President, UBEA  
Skyline High School  
Salt Lake City, UT 84109

Dear Mrs. Gillard:

Enclosed you will find a copy of my handbook, completed for the masters degree program at Utah State University. The title of the handbook is "What 1976-77 Utah Secondary Business Teachers Should Understand About Vocational Funding From the State Level to the Local Level."

In preparation of the handbook, I interviewed or had correspondence with Cary Lloyd, Walter Ulrich, my graduate committee (consisting of Ted Ivarie and Charles Parker), five vocational directors, and five secondary business teachers. After many drafts of the original handbook, the copy you have is in the finalized form.

Would you please take the time out of your busy schedule to read the handbook. Upon reading it, would you make the following determinations:

1. Should the secondary business teachers in the State have a copy of the handbook? (If yes, answer the remaining questions.)
2. Would UBEA be able to cover the printing costs?
3. Would it be possible to distribute the handbooks at the June Vocational Conference?

I appreciate any help you can give me on this project. Have a good Spring!

Sincerely,

(Mrs.) Debbie L. Hymas  
Business Teacher

Enclosure



## UTAH BUSINESS EDUCATION ASSOCIATION

3251 East 3760 South  
Salt Lake City, Utah 84109  
April 1, 1977

Mrs. Debbie L. Hymas  
619 Pheasant Way  
Bountiful, Utah 84010

Dear Debbie:

Thank you for sharing your report about federal funding for vocational education with UBEA. It was the concensus of feelings at our board meeting that your materials should be shared with all Utah vocational areas. The board felt that Vocational Directors should have a copy of your report, but that there were too many business teachers who have no interest-involvement in federal funding to warrant wholesale, free distribution to all business educators attending the June Conference.


On the other hand, UBEA does not have funds available to cover printing of your project.

I plan to take the copy of your report with me to the next UVA Executive Board Meeting on April 19, at which time I shall indicate that your study is available.

For the above reasons, we suggest that you write a news article for the Utah Vocational Association Newsletter, telling briefly about your report and indicating how vocational educators might secure a copy directly from you.

If you wish an article to appear in the UVA newsletter, I need to have received it prior to the April 19 board meeting.

Sincerely,

 Elizabeth B. Gillard  
President

Appendix 7Letters from the Vocational Directors,  
Business Education Supervisors, and  
State Business Administrators About  
the Importance of the Study

666 North First West #4  
Brigham City, UT 84302  
August 12, 1975

Ms. Rosemond Derran, Vocational Director  
Salt Lake District  
440 East First South  
Salt Lake City, UT 84111

Dear Ms. Derran:

I am presently working on my master's degree in Business Education at Utah State University, in addition to teaching business at Box Elder High School. My graduate advisor is Ted Ivorie, and one of my committee members is Charles Parker. The purpose of my Plan B paper is to determine what Utah 1975-76 secondary business teachers should understand about vocational funding from the state level to the school level. The results of the study will be summarized into a vocational funding handbook for Utah secondary business teachers.

To substantiate the importance of the study section of my Plan B paper, will you please answer the following:

1. Do you believe that it is important for Utah 1975-76 secondary business teachers to understand about vocational funding from the state level to the school level? *yes*
2. Is it necessary for secondary business teachers to understand vocational legislation? *yes*
3. Do you believe that most Utah secondary business teachers have a very limited scope of vocational funding procedures? *yes*
4. Do you believe that Utah secondary business teachers have sufficient knowledge about vocational funding procedures from the state level to the school level? *yes*
5. Would a vocational funding handbook for business teachers be a helpful tool in conveying vocational funding information to the business teachers? *yes*
6. Do you believe that Utah secondary business teachers would be receptive to this type of handbook? *yes*

## Question Responses:

1. Yes, definitely. This year at our June Vocational workshop, an attempt was made to do this, and teachers were delighted to have more understanding.
2. Yes. All educators should be able to defend and discuss vocational legislation.
3. Most have a very limited scope of funding procedures.
4. No.
5. Excellent idea--one that contains "most frequently asked questions" with answers.
6. Yes.





## UTAH STATE BOARD OF EDUCATION

1400 UNIVERSITY CLUB BUILDING, 136 EAST SOUTH TEMPLE STREET  
SALT LAKE CITY, UTAH 84111

WALTER D. TALBOT, STATE SUPERINTENDENT OF PUBLIC INSTRUCTION

August 14, 1975

Mrs. Debbie L. Hymas  
666 North First West #4  
Brigham City, Utah 84302

Dear Debbie:

Thank for your letter of August 12. I am returning to you the following information.

At present, most teachers in Utah understand very little about vocational funding from the state and federal level. Since becoming State Specialist I have especially tried to inform teachers at any workshop I have been having about such funding. There are still many, however, who are not aware of the procedures.

Your second question indicated a possible need for teachers to understand vocational legislation. I believe it would be helpful, but not as a requirement for their particular responsibilities.

A vocational funding handbook for business teachers would undoubtedly be helpful to those who have specific interest in vocational funding. However, my past experience tells me that there is a very small percentage of teachers who are interested in such information. I do believe that business teachers would be receptive to this kind of handbook, however.

You asked for Donna Parker's home phone number or her husband's name. I am sorry, but I do not have an answer to either request. You might try calling the district office for that information.

We are enclosing a copy of the 1974-75 State Plan. At the present time there are no copies of the Rules and Regulations of Vocational Funding.

Best wishes on your Plan D paper. Please let us know if we can be of further assistance.

Sincerely,

GARY M. LLOYD, State Specialist  
Business and Office Occupations



## UTAH STATE BOARD OF EDUCATION

1400 UNIVERSITY CLUB BUILDING, 136 EAST SOUTH TEMPLE STREET  
SALT LAKE CITY, UTAH 84111

WALTER D. TALBOT, STATE SUPERINTENDENT OF PUBLIC INSTRUCTION

August 18, 1975

Mrs. Debbie L. Hymas  
666 North First West #4  
Brigham City, Utah 84302

Dear Mrs. Hymas:

I received your letter recently relative to information concerning business teachers in the State of Utah. The following are my responses to your questions.

- (1) I believe it would be valuable for all vocational education teachers, counselors, and administrators to have a basic understanding about the various vocational education fund sources, the programs that funds are allotted for, and the general methods and procedure in which funds are received by the State Board for allocation to local educational agencies and eventually to individual program levels at the local schools.
- (2) I believe it is important for business teachers as well as other vocational educators to understand vocational legislation. They perhaps would not have to understand the detail which directors and administrators need to know, but they should become familiar enough to have a general understanding and appreciation for both State and Federal vocational legislation.
- (3) It is my belief that most secondary business teachers as well most vocational education teachers have very limited understanding of vocational funding procedures.
- (4) I believe it would be valuable for secondary business teachers (and all vocational teachers) to have a basic understanding concerning the budgeting process from the State to the local agency, to the program. I feel that many of our teachers do not have sufficient knowledge about their individual program budgets and this makes it difficult for them to operate an efficient, effective vocational program.
- (5) A handbook for vocational educators, including business teachers, could be a helpful tool in helping them understand the total budgeting system.

Debbie L. Hymas

- 2 -

August 18, 1975

There could be too much detail and too much involvement, however, in such a handbook which could hamper or make it not usable in terms of the needs of the vocational teachers.

(6) I believe most business teachers would welcome a brief review of the budgeting financial system in vocational education but would not take time to review a detailed book or publication of this type.

I hope this information will satisfy your needs. If there are any other questions please feel free to give us a call.

Sincerely,



WALTER E. ULRICH, State Director  
Vocational-Technical Education

/ds

Appendix 8

Handbook

WHAT 1976-77 UTAH SECONDARY BUSINESS TEACHERS  
SHOULD UNDERSTAND ABOUT VOCATIONAL FUNDING  
FROM THE STATE LEVEL TO THE LOCAL LEVEL\*

by

Debbie L. Hymas

\*Written before the Vocational Education  
Amendments of 1976.



## PREFACE

The State vocational budgeting system is becoming more complex each year. Many conditions and procedures must be met by a district before they can receive state and federal vocational funds. The business education departments within the districts must, in turn, meet certain requirements before obtaining funds.

Utah secondary business teachers should understand about vocational funding requirements and procedures from the state level to the school level. The purpose of this handbook is to give a general outline of vocational funding pertinent to business teachers on the secondary level. Also included in the handbook, will be answers to some of the questions Utah secondary business teachers have about vocational funding from the state level to the school level. Direct reference has been made in the handbook to information contained in the manual Rules, Regulations, and Procedures for Vocational Funding.

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WHAT ARE THE PREREQUISITES THAT MUST BE MET BY A DISTRICT BEFORE IT CAN RECEIVE ANY VOCATIONAL EDUCATION FUNDS?

In the manual Rules, Regulations, and Procedures for Vocational Funding conditions are outlined that must be met by a district in order to receive vocational education funds. The conditions necessary to qualify for funds are:

1. The State formula monies must be used jointly with state and federal vocational monies. When a new program is initiated for the first time, such as an office practice class or FELA, state and federal funds can then be used by the district. Also, state and federal funds can be used for added costs of operation of regular, on-going programs. An example of added costs by a program could be the updating of equipment in a shorthand program.
2. Students enrolled in the vocational programs will benefit from the experience.
3. Vocational education monies will be used only for approved district vocational programs. Funds could be allocated to the development of an office practice class in a high school, or a career center in the community. Descriptions of the types of vocational programs in a district are listed on pages 6 and 7.
4. A district must have an active vocational advisory committee.
5. Teachers instructing in the vocational programs must meet State certification requirements.

The following are procedures and activities allowable upon receipt of approval or funds:

1. The district can deduct certain costs in connection with vocational funding. Costs are given on page 7.
2. The length of the vocational program after approval is left to the discretion of the district.
3. It is recommended that coordinators or directors of cooperative programs should be employed for additional time to develop the programs.
4. The district must use curriculum guides approved by the State Course of Study Committee.

5. Youth clubs activities are to be considered an integral part of the regular vocational program and may be funded as part of that program.<sup>1</sup>

WHAT ARE SOME OF THE CATEGORIES OF VOCATIONAL FUNDS FROM THE STATE THAT ARE CHanneled TO THE SCHOOL DISTRICTS?

The main categories are titled "Parts, A, B, C, and D." From these parts results the major portion of district vocational funds. In the Vocational Education Amendments of 1968 an outline or a description was given of each vocational funding part.

Part A gave the general provisions to the funding from the state level to the district. It is stated that all students should be given the opportunity to prepare for their given vocational careers. Provisions are made in Part A to give funds to the districts on the basis of the number of students enrolled and attending regular classes in the school. The students must, however, be in grades 9 through 12.

Part B of the Vocational Funding Act is very important to vocational programs. Funds received by a district are directly related to average daily attendance (ADA) and average daily membership (ADM) of students in vocational classes. Part B funds are used to supplement, and to extend the existing vocational programs in a district. Part B monies may be used for education of adults, disadvantaged students, handicapped students, construction of area vocational schools, vocational guidance and counseling, ancillary services and activities, and vocational education programs for high school students. Part B funds may also be used for programs which are designed to prepare high school

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<sup>1</sup>Rules, Regulations, and Procedures for Vocational Funding, p. 10-12.

students for advanced or highly skilled postsecondary vocational and technical education.<sup>2</sup>

Part C funds may be used for research and training in vocational education. Funds available may be used for research in vocational education, vocational training programs, experimental or pilot vocational programs, demonstration projects, the development of new vocational education curricula, and projects in the development of new careers and occupations. The number of projects or programs under way in a district is converted to a formula number. The terminology for this formula number is units of federal funds. Every district in the State incorporates one or several of the above listed projects or programs resulting in the district receiving so many units of federal funds just because it is a district.

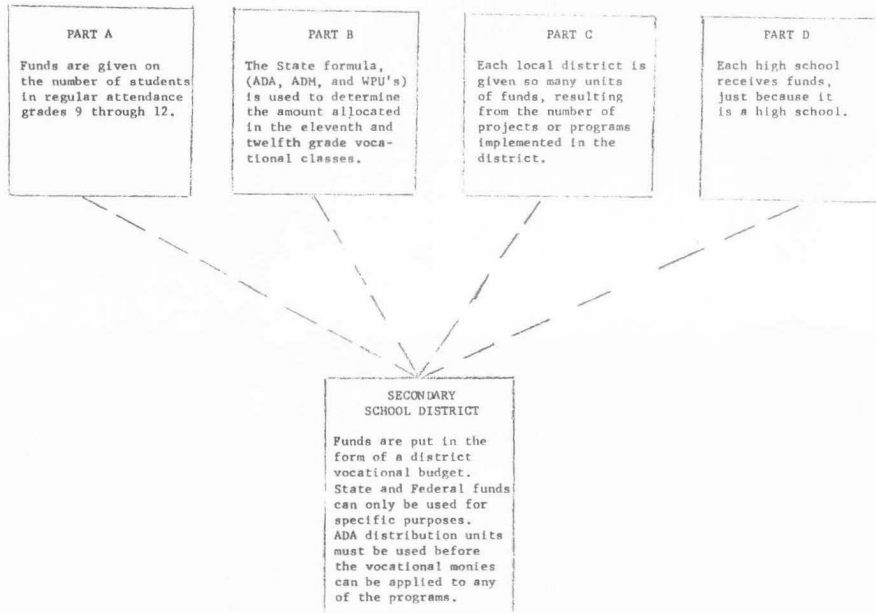
Part D funds are set aside for exemplary programs and projects. Funds may be used for projects or programs to develop quality education for students preparing to go to college. These projects and programs are also funded to give the students adequate preparation for their future job needs. The function of a high school is to prepare students for college and the job market. Since the objective of a high school is the aforementioned, a high school receives funds on that basis.

A diagram of the flow of the vocational funds to the district are shown on page 4. On page 5 is a diagram of the flow of Part B funds to the post-secondary and secondary systems. In reference to the diagram on page 5, portions of the Part B monies are taken out at the state

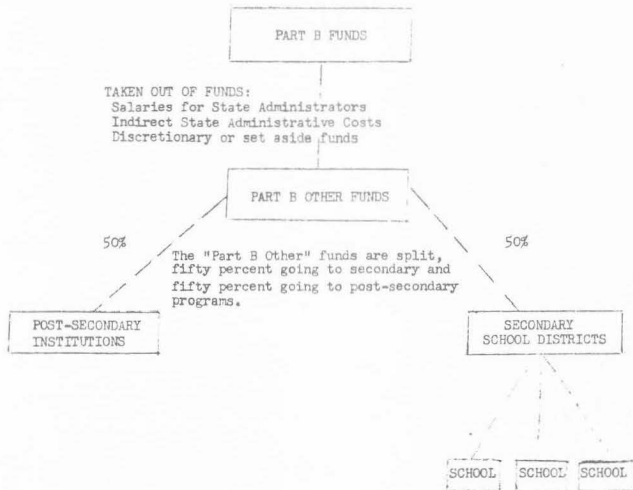
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<sup>2</sup>Vocational Education Amendments of 1968, p. 9.

DIAGRAM OF THE FLOW  
OF STATE VOCATIONAL FUNDS  
TO THE DISTRICT



THE FLOW OF  
VOCATIONAL EDUCATION ACT PART B FUNDS TO THE  
POST-SECONDARY & SECONDARY SYSTEMS



FORMULA FOR RECEIVING FUNDS:  
The post-secondary school  
uses the full-time equivalency  
enrollment basis.

FORMULA FOR RECEIVING FUNDS:  
The secondary school district  
uses the State formula of ADA,  
ADM, and WPU's.

level before given to post-secondary institutions and the school districts. The remaining monies are then classified as Part B Other Funds.

WHAT ARE THE TYPES OF DISTRICT PROGRAMS THAT CAN RECEIVE VOCATIONAL EDUCATION FUNDS?

Business teachers should know the kinds of vocational programs for which state and federal vocational education monies may be used within a district. The types of vocational programs, a description and grade levels at which the programs may function are given in Rules, Regulations, and Procedures for Vocational Funding. They are:

1. Career Orientation--Grades K-6  
This program helps students to know, understand, and appreciate more about the world of work and kinds of occupations.
2. Exploration--Grades 7-8  
Introduction to students of as wide a variety of experiences as possible in occupations, homemaking and consumer education.
3. Basic Vocational--Grades 9-10  
Deepens occupational exploration in limited fields and introduces skill training and related vocational subjects.
4. Vocational--Grades 11-12  
Vocational courses designed to prepare students for entry into employment or to advance into specific occupational preparation in vocational and technical fields. Only students who have chosen vocations and have their choices on file with their instructors are considered vocational.
5. Vocational-Technical--Grades 13-15  
Advanced instruction in specific vocational and technical occupations. Students enrolled should have a vocational goal on record with the institution and/or department head or instructor.
6. Special Programs--Any Level  
Programs designed to provide special vocational and other instruction to persons who, because of disadvantage or handicap need additional assistance in preparation for and training in a vocation or job.
7. Adult--Vocational Programs



Individuals not otherwise classified who are enrolled for preparatory or supplementary instruction.

8. Educational Facilities

Local educational agencies who conduct vocational educational programs as identified above will provide adequate vocational facilities for successful, quality program operation.<sup>3</sup>

WHY IS IT THAT THE MONEY GENERATED FROM ONE VOCATIONAL PROGRAM IS GIVEN TO ANOTHER PROGRAM? SHOULDN'T THE PROGRAM THAT GENERATED THE FUNDS IN THE FIRST PLACE, RECEIVE SAID FUNDS?

The two main parts to the district budget are the generation of funds and the expenditure of funds. Many teachers make the erroneous conclusion that the expenditure of funds is in direct relationship with the generation of funds. No ties exists between the generation of funds and the expenditure of funds. Generating of funds are determined through the State formula. (Refer to the explanation of the State formula on page 9.) The stipulations for using the State formula would be that the students are in the eleventh or twelfth grade, and the classes are vocationally oriented. The State Plan states that the vocationally oriented business classifications are:

- 14.0100 Accounting and Computing Occupations
- 14.0200 Business Data Processing Systems Occup.
- 14.0300 Filing, Office Machines, Clerical Occup.
- 14.0400 Information Communication Occupations
- 14.0500 Materials Support, Transportation, etc.
- 14.0600 Personnel Training and Related Occup.
- 14.0700 Steno, Secretarial and Related Occup.
- 14.0800 Supervisory and Administration  
Management Occupations
- 14.0900 Typing and Related Occupations (Advanced Typing)
- 14.9901 Simulation
- 14.9902 Coop Office Education

---

<sup>3</sup>Rules, Regulations, and Procedures for Vocational Funding, p. 11.

The Vocationally oriented business classes are:

Shorthand I & II	Business Machines	Office Procedures
Typewriting II	Accounting	Business Law
Bookkeeping	Office Simulation	Business Math

Each vocational class (eleventh and twelfth grade students only) in the district contributes to the generating of funds. These generated funds from the State are then put into one large district vocational fund. The vocational director can now start to organize the vocational funding budget for the school year. A district encounters expenses that must be withdrawn from this fund before the remaining monies are dispersed to the district vocational programs. Examples of these expenses are: Salaries of vocational director and vocational administering personnel, salaries of vocational teachers, job placement program evaluation, instruction materials preparation, and counseling. Other direct costs involved would be: rental of facilities, rental of equipment, clerical assistance, curriculum development, custodial services, and costs resulting from vocational student organizations. The remaining funds are generally used for: supplies for proper program function, travel expense for instructors and students for operation of a quality program, and equipment for programs at the eleventh grade level or above (equipment purchased for these programs can be used at other levels.)

IS THERE ANY WAY THAT BUSINESS TEACHERS CAN FIND OUT HOW MUCH MONEY IS COMING INTO A DISTRICT?

A business teacher can find out how much money is coming into a district by several methods. The State sends the allocation forms of vocational funding concerning all districts to each vocational direc-

tor in the State. The vocational director will probably incorporate one of the following procedures in relaying this information to the business teachers or the vocational teachers:

1. The vocational director gives copies to the coordinators, who in turn contacts the teachers.
2. The vocational director calls a meeting of the vocational teachers in the district towards the beginning of the school year. With the use of overhead transparencies and other media, the vocational director explains to the teachers the allocations given to the district.
3. The vocational director sends copies of the allocations to the vocational teachers.
4. The vocational director does not inform the teachers about the allocations to the district. Only when a teacher goes to the office and requests additional information about funding will the director discuss the district's allocations.

Vocational directors generally are not offended to have teachers come into the office for information regarding the allocations of vocational funds to the district. In fact, most vocational directors welcome visits from the vocational teachers.

#### WHAT IS THE STATE FORMULA AND HOW IS IT USED FOR DETERMINING FUNDS GIVEN TO A DISTRICT?

The State formula is used to determine the appropriation of "Part B Other" monies to the district. The generating of funds are associated with this formula. On page 10 is a sample worksheet for the computation of ADM and ADA for a typewriting II class. On page 11 is a sample report, using the State formula, which is filled out annually by the vocational director. On page 11 section B-2, reference is made to figures on page 10. If for example, more than one typewriting II class was held the formula would be:

ATTENDANCE ACCOUNTING  
AND COMPUTATION OF ADM AND  
ADA OR FTE FOR REGULAR  
VOCATIONAL PROGRAMS W.P.U. ADD-ONS  
1974-75

PERIOD	INSTRUCTOR	COURSE TITLE	DATE CLASS BEGAN	DATE CLASS ENDED	TERM SUMMARY		YEAR END SUMMARY	
					DAYS OF MEMBERSHIP	DAYS OF ATTENDANCE	YEAR END MEMBERSHIP	YEAR END ATTENDANCE
I	Mark Johnson	Typing II						
TERM	SCHOOL	COURSE CODE						
I-4	Kennedy High School	14.0900	9-3-74	5-28-75				
		NO.						
			WEEK 1	WEEK 2	WEEK 3	WEEK 9		
			M T W T F	M T W T F	M T W T F	M T W T F		
	PUPIL	SEX	GRADE	ENTRY CODE	EXIT CODE			
	1. Joan Cook	F	12	E1		X	44	41
	2. Todd Elder	M	12	E1			44	44
	3. Paul Jones	M	11	E1			39	39
	4. Mary Long	F	12	E1			44	44
	5. Jean Lowe	F	11	E1			44	44
	6. Ralph Heath	M	11	E1		X	44	41
	7. Debra Ott	F	12	E1			44	44
	8. Carla Smith	F	12	E1			44	44
	9. Carol Bailey	F	12	E1			40	40
	10. Judy King	F	12	E1			31	27
	11.							
	12.						418	408
							1642	1611

Computation of ADM and ADA or FTE for Regular Vocational Weighted Pupil Units Add-ons based on six period day in which class meets every day during term.

$$\text{ADM} = \text{Total year end aggregate days membership } 1,642 \div 180 = 9,122 \div 6 = 1,520$$

$$\text{ADA} = \text{Total year end aggregate days attendance } 1,611 \div 180 = 8,950 \div 6 = 1,492$$

Enrolled = 10

School District 20

AVERAGE DAILY ATTENDANCE AND MEMBERSHIP  
AND WEIGHTED PUPIL UNITS (W.P.U.)  
FOR REGULAR VOCATIONAL PROGRAM ADD-ONS  
1974-75

A. One W.P.U. computed for each 20 regular day school pupils grades 9-12 in $\frac{75,880 + 79,042}{2} = 77,461 \div 20 = 3,873$ W.P.U.								
				A. D. A.	A. D. M.			
B.	Col. 1 Are Vocational Teachers Vocationally Certified?	Col. 2 Using State Approved Course of Study?	Col. 3 All Course Titles Have an Approved O. F. Code Number? 11-12	Col. 4 Total Enrolled In Col. 3 11-12	Col. 5 A. D. A. 11-12	Col. 6 A. D. M. 11-12	Col. 7 $\frac{A. D. A. + A. D. M.}{2}$	Weighting Factors
1. Agriculture	Yes <u>X</u> No ___	Yes <u>X</u> No ___	Yes <u>X</u> No ___	12	1,790	1,874	1,807	X .5 X 1.29 = 1,086 W.P.U.
2. Business	Yes <u>X</u> No ___	Yes <u>X</u> No ___	Yes <u>X</u> No ___	10	1,492	1,520	1,506	X .5 X .70 = 0,527 W.P.U.
3. Distributive	Yes <u>X</u> No ___	Yes <u>X</u> No ___	Yes <u>X</u> No ___	10	2,492	3,040	2,766	X .5 X .50 = 0,652 W.P.U.
4. Home Economics	Yes <u>X</u> No ___	Yes <u>X</u> No ___	Yes <u>X</u> No ___	15	2,238	2,280	2,259	X .5 X .30 = 0,339 W.P.U.
5. Technical & Industrial	Yes <u>X</u> No ___	Yes <u>X</u> No ___	Yes <u>X</u> No ___	6	2,492	2,514	2,503	X .5 X 1.40 = 1,752 W.P.U.
Total B1, B2, B3, B4, and B5								= 4,394 W.P.U.
C. Weighted Pupil Units for Each Local School District								= 9,000 W.P.U.
D. Number of High Schools in Local School District <u>1</u> X 16								= 16,000 W.P.U.
E. Total A, B, C, & D								= 33,267 W.P.U. Add-on

ADM X No. Periods Class Held = \_\_\_\_\_ divided by Minimum Days of  
School Per Year = \_\_\_\_\_ divided by Periods Per Day = \_\_\_\_\_.

The abbreviations and their meanings incorporated in pages 10 and  
11 are:

ADA - Average Daily Attendance  
ADM - Average Daily Membership  
WPU - Weighted Pupil Units  
OE CODE NUMBER - Office of Education program number

The formula for a business vocational program is:

$$\frac{ADA + ADM}{2} \times .5 \times .70 = \text{WPU}$$

Using the figures on pages 10 and 11, the business section of the  
formula would look like this:

$$\frac{1.492 + 1.520}{2} \text{ (or } 1.506) \times .5 \times .70 = .527 \text{ WPU}$$

ADA and ADM are divided by two to obtain the mean of the two numbers.  
The .5 figure divides the mean in half. The figure .70 is only used  
for business programs. In reference to the formula report on page 11,  
all of the various vocational departments have their own figure in  
this section of the formula. The different figures are weighting  
factors in the formula, determined by the size of the vocational  
programs.

The State equalization figure, which is determined at the State  
level, is the estimated cost of a student enrolled in a vocational  
class. This figure does not remain constant year after year, but  
is subject to change as deemed necessary at the State level. The  
equalization figure is used in connection with the State formula.  
After a district determines its WPU's, it is multiplied by the State

equalization figure. The final step in the funding formula for each district would be:

State equalization figure X District's WPU = Funds for District  
 Using a State equalization figure of \$621 and a district's total WPU  
 (see page 11) of 33.267, a sample formula would be:

$$\$621 \times 33.267 = \$20,658.81$$

Depending on the number of vocational classes in the State, a district will receive its share of funds available. The previously mentioned formula results in an equitable distribution of funds among the districts in the State.

WHY ARE STUDENTS IN GRADES EIGHT THROUGH TEN NOT INCLUDED IN DETERMINING THE WPU'S? ALSO, WHY ARE ONLY CERTAIN BUSINESS CLASSES CONSIDERED VOCATIONAL?

Students in grades eight through ten are career oriented but not involved in preparation for a career. Whereas, eleventh and twelfth grade students are starting to investigate and prepare for careers that will lead to successful occupations. The classes taken by juniors and seniors most often reflect the subject area that they are interested in pursuing for possible careers.

Only certain business classes are considered vocational because the objectives of these classes are career preparation in a business related occupation. Examples of vocationally oriented business classes are found on page 8 of this handbook. The other business classes are designed to give the learner general knowledge or a skill that can be used in many areas. These non-vocational classes are not geared to train individuals for careers, but to stimulate interest in

the world of business. Examples of business classes that would fall under this category are: Beginning Typewriting, Personal Typewriting, and General Business.

It may appear that discrepancies exist between the preceding comments and the definitions on pages 3 and 6 describing which programs may qualify, but the preceding comments are in reference to funds received through Part B monies. The other programs may be funded through one of the other vocational funds. Again, vocational courses are designed to prepare students for entry into employment or to advance into specific occupational preparation in vocational and technical fields.

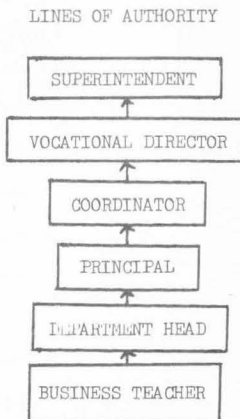
Eleventh and twelfth grade vocational-oriented students count double when computing the appropriation of funds from the State. The students count once for being enrolled in school and again for attending a class that is vocationally oriented. Teachers should realize that the district receives generated funds on the basis of attendance of these students. Whenever a student is out of a business class, the program is losing Part B Other monies for the district's business program.

IF TEACHERS WITHIN A BUSINESS DEPARTMENT HAVE COMPLAINTS CONCERNING VOCATIONAL FUNDS RECEIVED TO SUPPORT THEIR PROGRAM, WHO SHOULD THEY CONTACT FOR FUTHER DISCUSSION? WHAT ARE THE LINES OF AUTHORITY?

A business teacher should first talk to his department head. If several business teachers from within the department have the same basic complaint about funding to the department, then the department head should call a department meeting. An outline of concerns should be made at the department meeting, also a course of action



should be agreed upon by the majority of the teachers within the department. The department head or one so authorized by the department will present the business teachers' case to the principal. No matter what the request might be, it is extremely important to obtain the cooperation of the school principal. The principal will then contact the next authority in the district. The lines of authority are:



In the districts in the State that chooses not to employ coordinators, their lines of authority would consist of five individuals instead of six individuals. However, the coordinator is the mediator between the vocational director and the business teachers or the vocational teachers in general. The coordinator reviews the needs and requests of the vocational teachers, discusses the vocational programs in the school with the principal, obtains the principal's opinions as to the needs and objectives of the vocational programs in the school, and relays this information to the vocational director.

WHO MAKES THE DECISION AS TO HOW THE VOCATIONAL FUNDS IN THE DISTRICT WILL BE USED? HOW ARE DECISIONS MADE AS TO THE EXPENDITURE OF VOCATIONAL FUNDS IN A DISTRICT?

Theoretically, the school board decides how the vocational funds will be spent at the time they adopt the budget. Depending upon the district, the superintendent may make that determination. However, in many districts the decision is made by the assistant superintendent or the vocational director.

If the vocational class is large enough, say a typewriting class (advanced) with forty students enough funds would have been generated to cover the expenses of that class. If you have a Shorthand II class that only has twelve students in it, then you have to put some vocational funds into the class. It is at this point that decisions have to be made on whether a class will receive additional funding. The vocational director or superintendent is left with an arbitrary decision. He decides on the need and importance of the program, thus determining the allocation to that program. It is up to the district administrators as to whether they should subsidize a program with vocational monies. However, if a district does not spend the money generated or any other monies given to the district they will lose the monies at the end of the year. The district cannot accumulate the monies over the years. All unspent monies are returned to the State at the end of the year.

DO VOCATIONAL FUNDS COME TO THE DISTRICT DURING DIFFERENT TIMES OF THE YEAR?

Yes, vocational funds are received quarterly.



## WHEN DOES THE DISTRICT MAKE PLANS FOR THE COMING SCHOOL YEAR'S BUDGET?

Budget estimates are made in the spring. These estimates are then sent to the State vocational office for approval. It is important to realize that vocational directors when setting up a budget are constantly working with estimates. In fact, the directors will not know if their estimates were correct for the preceding year until about six to eight months after the books are closed for that school year. In order to avoid incorrect estimates, the vocational director has to be very careful in organizing the budget for the coming school year. When a teacher asks how much money is available, the director cannot give an exact figure, only an estimate.

## HOW SHOULD A TEACHER APPLY FOR ADDITIONAL FUNDING FOR HIS DEPARTMENT?

If a business teacher wishes to apply for additional funding for his department, he should obtain a requisition form from the department head. A sample requisition form is found on page 17. The completed requisition form goes through the "lines of authority" as found on page 15. Most of the completed requisition forms are not given to the superintendent, but the vocational director makes most of the decisions concerning the requisitions. The vocational director, when he receives the requisition, will evaluate the request based on certain priorities. These priorities may differ from one district to another, but most of the districts have the same goals. They are: to build up all the existing vocational programs, evaluate the worth of new programs, determine what is best for the total program, and decide if the district can actually afford to grant the request. It is important that the teacher have the backing of his principal before trying to receive

additional funds for the department. Your request for funds has little chance for success, if your request is not backed by your principal.

WHEN DOES A TEACHER APPLY FOR FUNDS FOR A NEW VOCATIONAL PROGRAM?  
DOES A TEACHER FOLLOW THE SAME POLICY AS FOR ANY OTHER TYPE OF FUNDING?

Budget estimates for the coming year are made in the spring. The best time to submit the request for funding for a new vocational program would be around April or May. The monies that a school district gets is budgeted and encumbered by July 1. No monies for new programs, or equipment will be allocated into the district after July 1. If the request for monies for a new program are not submitted by July, there is no way a new program can get started that year. Monies for the new program must be set aside in the coming school year's budget.

When trying to receive funds for a new program, rather than filling out a requisition form a different procedure is followed by the teacher. The teacher should write a proposal for the new program, including the following:

1. A brief statement of goals for the program.
2. Specific statements of objectives.
3. Activities, procedures, and/or methods for accomplishment.
4. Detailed cost requirements of the project.
5. A time schedule for its accomplishment, if applicable.
6. A statement of the benefits to be expected from the program or project.
7. Provisions for evaluation of the project upon its completion.

CAN A TEACHER RECEIVE FUNDS FOR AN INDIVIDUAL RESEARCH PROJECT IN THE FIELD OF BUSINESS EDUCATION?

Yes, a teacher can receive funds for a research project. A proposal must be sent in to the office of the State Superintendent of Public Instruction. However, it is suggested that the proposal first be sent to the superintendent for approval or comments. This type of proposal can be sent in at any time during the year. Information regarding current priorities for research and development may be obtained by contacting the Division of Research and Innovation for subject matter and financial support. For example, a teacher should first receive local clearances for the project, and then contact the state specialist. Guidelines for proposal development of project are broadly outlined below:

1. Statement of the Problem
2. Integrated Review of the Literature
3. Statement of Objectives
4. Procedures to be Followed in Meeting Objectives
5. Design for Evaluating Project Management Activities and Outcomes
6. Plan for Dissemination
7. Personnel
8. Budget
9. Facilities and Equipment

Appendix 9Definitions

For purposes of this study, terms were defined as follows:

1. Funds: Unless otherwise specified, it means any funds available for expenditure under the State plan, whether derived from Federal allotments under the Act, or from state or local appropriations or other non-Federal sources.

2. State Plan: This is made in reference to the Utah State Plan for Vocational-Technical Education. The State Plan was developed for the guidance and direction of public and private education agencies, institutions, and organizations desiring to conduct vocational-technical education programs in the State of Utah.

3. Act: The act means the Vocational Education Act of 1963, as amended in 1968.

4. Secondary Business Teachers: Individuals who are qualified to teach students business subjects in grades 7-12 but does not include grades beyond grade 12.

5. State Board: A State board is designated or created by State law as the sole State agency responsible for the administration of vocational education, or for supervision of the administration thereof by local education agencies in the State.

6. Local Education Agency: Another name for this agency is the Board of Education having administrative control and direction of public elementary or secondary schools in a city, county, township,

school district, or political subdivision in a State, or any other public educational institution or agency having administrative control and direction of a vocational education program.

7. Vocational Director: Under the direction of the superintendent or assistant superintendent, this individual organizes and develops vocational programs within the district. He works with the vocational teachers in the district to help them improve and maintain existing vocational programs, and also to create needed new programs. He develops the vocational budget for the district, and handles the disbursement of funds.

8. Coordinator: He is the mediator between the vocational director and the business teachers or the vocational teachers in general. The coordinator reviews the needs and requests of the vocational teachers, discusses the vocational programs in the school with the principal, obtains the principal's opinions as to the needs and objectives of the vocational programs in the school, and relays this information to the vocational director.

9. Vocational Education: Programs, services, or activities related to vocational or technical training or retraining provided under the Vocational Education Acts, or the regulations under the Acts, and the State Plan means vocational education. Vocational education also includes technical training.

10. State Advisory Committee: A State Advisory Committee is composed of professional personnel. Members to the Advisory Committee are appointed by the Administrator for Vocational and Technical



Education. The duties of the Advisory Council members are to review professional development programs of the institutions and the State Board, to have open communication with industry and business to determine changes, to determine the needs of the community and the industrial and business economy of the State, to make periodic evaluation of the professional development program, and on request of the Administrator for Vocational-Technical Education or the Deputy Superintendent for Adult, Vocational, and Rehabilitation Services, to make specific written recommendations for the professional development program.

11. Professional Development Program: The purpose of the program is to increase the capability of agencies, institutions, business, industry and community enterprises in meeting personnel needs of the State.

12. Part B Funds: Funds allotted under the Vocational Education Amendments of 1968 within the section of State Vocational Education Programs.

13. Part B Other Funds: The remainder of funds after State administration and discretionary funds are deducted from Part B funds. State administration funds are used to pay a portion of the salaries of State office vocational education staff as well as some indirect administrative costs. Discretionary funds are held back for use in new and emerging training needs as well as other special needs that arise within the fiscal year.