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Professional Development for Classified Managers within the Business Services

Departments at California Public School Districts

A Dissertation by

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A Private Nonprofit Affiliate of the University of Massachusetts

Irvine, California

School of Education

Submitted in partial fulfillment of the requirements for the degree of

Doctor of Education in Organizational Leadership

June 2023

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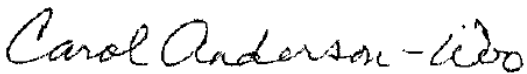
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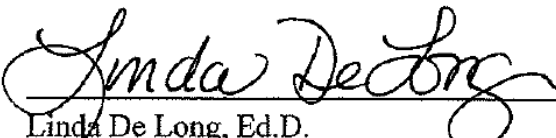
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Doctor of Education in Organizational Leadership

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June 2023

Professional Development for Classified Managers within the Business Services

Departments at California Public School Districts

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This dissertation has become a reality after a long struggle; thus, it is a huge accomplishment. This accomplishment was not without the support of some individuals in my life. First and foremost, this has been possible because of God. I could not have accomplished this without my faith in God, the hope, strength, and endurance to overcome all types of adversity and loss throughout the years, you made me who I am.

I dedicate this accomplishment to my husband, Javier, and our four sons: Jonathan, Michael, Christopher, and Steven. To my granddaughter, Lucia “Lucy,” you can do anything you put your mind to; you have done so much already and I cannot wait to see what the future holds for you! To my brothers and sisters, the three I lost during this program, Stella, Carlos, and Jr., and my brother I lost prior, Albert, I hope you are proud and smiling upon me in Heaven. Thanks to those who are still here, Nancy, Sylvia, Elsa, and Marina. To my nieces and nephews, you are our future, make us proud. Thank you to my mom who has made me the strong determined woman I am. She raised nine children with strength and resilience. You taught us never to give up. For you Mom!

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When I started this journey, I had just finished my master's degree and did not want to continue school as I did not believe in myself. However, when someone tells me I am not good enough for something, I want to prove them wrong. I have determination, focus, and grit. To say I am extremely proud of myself is an understatement. I graduated high school pregnant, married at 19, and had my 4th son at 26. I did not know going to college was possible. I was busy working full-time and taking care of my children.

I am the first generation in my family to graduate from college, receive a master's degree, and now a Doctorate, and I know I will not be the last! I took one class at Chaffey College and received my first A. I was alive! I had to remind myself that life does not have to stop and dreams do not have to be forgotten. To all the young girls and women with self-doubt, your determination to want more for yourself can achieve your dreams. For those of you who had your life changed by a circumstance or decision, it does not have to be a life sentence. Believe in yourself as it does not matter how old you are, do what you are meant to do! The love for yourself and especially for your family is all you need to accomplish more!

ABSTRACT

Professional Development for Classified Managers within the Business Services

Departments at California Public School Districts

by Juliet Castorena Orozco

Purpose. The purpose of this Delphi study was to identify and describe professional development topics required to prepare classified managers in California public school district business services departments as effective leaders as perceived by a panel of experts. This study also sought to identify the degree of importance of each professional development topic and the best strategies to address those topics as perceived by a panel of experts.

Methodology. A Delphi research design was used to identify and describe professional development strategies necessary to prepare classified managers in the business services division of California public school districts. The Delphi panel consisted of 22 experts in the field of classified professional development. The first round identified professional development topics, which were then ranked by importance in Round 2 along with generating strategies for delivery. In Round 3, the experts re-rated the topics as most important and identified the top three strategies for delivery of each of the seven topics.

Findings. Research Questions 1 and 2 yielded seven major findings aligned with the seven most important professional development topics for classified business managers as perceived by a panel of experts. Research Question 3 yielded three major findings, which expounded on the delivery strategies for the successful delivery of professional development. Additionally, three unexpected findings were explored by the researcher.

Conclusions: Based on the research findings, four conclusions were drawn.

Recommendations: The results of this research led to the need for action to ensure classified employees receive the opportunity to grow and develop into leaders the public school system needs. The annual state budget should ensure sufficient funding and accountability for professional development. Secondly, county offices of education must provide structure and opportunities for training. Professional associations should partner to invest in emerging classified business services leaders utilizing the seven identified professional development topics. Lastly, the Women’s Leadership Network should use this research to help develop emerging women classified business services leaders.

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CHAPTER I: INTRODUCTION

If you're not learning, you're not reaching your potential.

—Jim Rohn

In a time of drastic change, learners benefit and grow from participating in professional development. The current times of economic change and globalization require constant updating of knowledge and skills (Saar & Rais, 2017). However, many work skills are difficult to learn and take time to obtain (Covey, 2019). Employers are competing for employees with education and experience and will pay top dollar to keep those employees (Cannata & Penaloza, 2012). Often, the lack of qualified people to fill jobs is the result of people not having the skills or training necessary to succeed in the position (Brown, 2016). This symptom indicates a growing problem in the U.S. economy where employers are unable to find enough skilled workers to meet the demands of their growing vacancies (Halbert, 2016). This disparity is referred to by economists as the job skills gap, a challenge continuing to grow (Halbert, 2016).

An organization's success rests on a skilled workforce, which consists of the education, development, and training provided to individuals. A workforce of employees who are motivated, engaged, and well-trained strive toward achieving organizational and personal goals (Gallo, 2011). As organizations develop their employees, in addition to improved skills, other outcomes include more positive morale and greater employee satisfaction, which results in enhanced performance, increased productivity, and decreased employee turnover (Craig, 2018).

In this transforming world, there is an ever-increasing need to develop leaders and leadership at all levels of organizations. Elements driving this in business include the need to increase sales, improve time management, develop teams, enhance performance,

and address generational changes (Gleeson, n.d.). One of the most common business challenges currently facing China, India, and the U.S. is the development of managerial effectiveness (Gentry, Eckert, Stawiski, & Zhao, 2016). This is also true in the field of education. With more than 250,000 classified employees in California public schools and community colleges (California School Employees Association [CSEA], n.d.), developing and enhancing performance and managerial effectiveness has a significant impact on the continued service to over 56.4 million students in the K-12 public school students and over 19.7 million community college students (National Center for Education Statistics [NCES], 2020).

Leadership and managerial excellence are crucial in public education institutions (Leginfo, 2013). Classified school employees play a vital role in the education of students attending California's public schools and community colleges. Classified employees perform essential work for schools outside of administration and direct instruction for students, such as food services, campus maintenance, daily operations, office and clerical, special services, transportation, library media, information services, school security, and noon supervision (CSEA, 2018.). According to Jackman (1959), "Leading school authorities have declared that a successful classified employee is also a responsible classified employee and that definite training is needed to prepare him to perform his duties efficiently and satisfactorily" (p. 2). However, developing managerial effectiveness for such a broad array of positions is challenging and therefore few training initiatives are aimed at these diverse personnel (Gentry et al., 2016).

Ongoing professional development is critical to the growth, retention, and future of classified personnel in school districts and community colleges. In today's modern

age, educational institutions rely heavily on the expertise of classified school employees to keep campuses safe, organized, clean, and efficient (CSEA, 2018). Classified employees are the backbone of the public school system and to retain this valuable resource, it is critical to provide the opportunity for continued personal and professional development (CSEA, 2018.).

Background

Organizations in the 21st century are fast-paced environments with ever-evolving knowledge and techniques. Opportunities are virtually appearing and disappearing at the same speed as the Internet (Károly & Panis, 2004). Keeping employees updated on the latest field developments and competency needs is critical. One way to do that is by providing training (Gill, 2014). Similar to the way people upgrade software to ensure the most current, bug-free versions are available, companies must upgrade employees to guarantee skills are current and provide optimal value to the organization. Although staff time and training costs are significant, the numerous benefits include increased effectiveness, broadened capabilities, stronger employee loyalty, decreased turnover, and enhanced interfacing among departments; thus, the benefits of training employees offer a greater return on investment, making training worth it (Gill, 2014).

Classified Employees

Classified employees refer to staff working without teaching or administrative authorization in a school or district in areas other than direct instruction to students. Classified employees work in every office and department of a school district, including operations, accounting, payroll, technology, facilities, business office, human resources, transportation, and school office (CSEA, 2018.). Governor Ronald Reagan first

established Classified School Employee Week in 1969, stating, “The classified employee is proud of his status and the integral part he plays in the total field of education throughout the State of California” (para. 2). This was the first state recognition by a governor that classified employees held positions of importance and contributed to the success of districts and schools. By establishing a Classified School Employee Week, Governor Reagan suggested classified employees had a critical role and function within school districts (CSEA, 2018).

Although much professional development is provided for teachers, little is available to classified staff (CSEA, 2018). Changes in regulations, technology, and other areas require ongoing learning among classified staff as well. CSEA assumed a role in providing their members with professional development to assist staff in supporting the educational programs of the school district. CSEA (2013) passed resolutions to help support members with professional development, citing changes in technology and new safety regulations as major drivers for additional training. For example, custodians experienced changes in regulations related to cleaning materials and the importance of understanding toxins. Classroom aides need more training because of changing legislative requirements when working with diverse student languages. Additionally, business services functions are often changing in relation to new audit guidelines, new reporting mechanisms, and revisions to funding models. Professional development is needed for classified staff to ensure the school district and its functions continue supporting students and complying with legislative rules and regulations.

Management and Leadership Positions in School Districts

Management and leadership positions within a school district are key to employee and organization success. Manager roles are designed to delegate duties, not perform them, and managers often perform within teams (Tiwary, 2015). *Characteristics of Effective Teams* (Harvey & Drolet, 2005) stated mutual trust is not an act or set of acts, but the result of other actions or variables. Trust is one of the keys to the relationship between employees and managers. This relationship should not be top-down but built on five conditions: interdependency, consistency, honesty, affability, and trust.

Interdependence is important because the understanding of mutual needs is needed to establish a basis for trust. Consistency builds trust as both parties learn to rely on each other. Honesty develops commitment and trust whereas dishonesty destroys trust.

Affability is important because it is easier to trust well-liked people, although affability is not sufficient on its own. Harvey and Drolet (2005) explained, “Those who give trust, get trust” (p. 23).

School districts rely on a variety of managers and leaders to function. Different departments in school districts include operations, transportation, food service, and purchasing. In every department, there is typically a manager or director in charge of department staff. Johannsen (2007) defined managers as someone focused on organizing, planning, coordinating, controlling, and directing the use of resources, time, strategy and budget.

Professional Development in Organizations

Professional development is known by other names as well, such as professional learning, professional growth, or continuing education (Sangiuliano, 2000). Every

organization has different professional development needs based on the specific field and what is necessary to keep employees current with the latest knowledge and skills. The specific professional development program depends on staff needs, availability of resources, employee motivation to grow and develop, and available training opportunities (Hassel, 1999). All four of these factors are important in analyzing the needs of employees and designing appropriate training.

Over the past few years, organizations across the public sector sought to implement new strategies and solutions in a bid to increase efficiency and reduce operational costs (iGov, 2015). However, the success of these plans often hinges on the skills and leadership of those driving them. Although some training may be provided during the onboarding process when a staff member enters a new position, such training is often focused on the technical skills required of the job rather than developing leadership skills (iGov, 2015). They usually have little or no training or experience in leading a team. Like leaders in any field, classified managers need training and support to learn to lead and to advance in the ranks. Although lack of training and experience often leads to workplace challenges, research attempted to determine which behaviors were indicators of a leader (Gordon & Yukl, 2004; Hollander & Julian, 1969; Horner, 1997; Karmel, 1978; Yukl, 1989).

Many companies include a process for new employees to learn about their company and how it operates, but this practice is uncommon in school districts, especially for classified staff (Mizell, 2010). This gap in professional development, and particularly for leadership skills, serves as an opportunity for school districts to change

their practices to improve operational efficiency and upward mobility among classified staff.

Theoretical Foundations

General Learning Theory

Three general learning theories are at work within professional development, behaviorism, cognitivism, and constructivism (McLeod, 2021). McLeod (2021) described behaviorism as a learning orientation focused on activities and situational circumstances. Cognitivism focused on the brain and how information was processed, stored, and recalled. Constructivism served as the broad umbrella of making meaning through experiential learning, self-directed learning, and reflective practice.

Adult Learning Theory

Additional theoretical foundations for professional development come from adult learning theories and one of the initial seminal authors was Malcom Knowles (1980). Knowles cited the work of Cyril O’Houle in 1961 stating adult learners fell into three sub-groups: goal oriented, activity oriented, or learning oriented. In the 1960s, researchers studied how adults learned and associated learning with psychology, gerontology, sociology, and anthropology. Over time, the research on adult learning began to center on three major theories: andragogy, self-directed learning, and transformational learning (Knowles, 1980).

Andragogy learning. Andragogy learning is a theory that originally documented the difference between adult and child learning (TEAL, 2011). In this theory, adults move from dependency to self-directedness when they direct their learning, and it was shown adults have a deep psychological need to be generally self-directing (Knowles, 1980).

Within andragogy learning theory, Knowles ascribed to adults principles such as self-concept, experience, readiness, problem-centered orientation, internal motivation, and a need to know. Today it is more commonly known as adult learning theory (Neit, 2021).

Self-directed learning. Self-directed learning theory was also developed in the 1960s based on the work of Huell, Tough, and Knowles (Sangiuliano, 2000). This includes the ideas of self-planned learning, self-teaching, and self-direction, which are connected to self-concept. According to Sangiuliano (2000) in her course on adult learning, “Self-directed learning is a reflective process in which individuals take the initiative for planning, executing, and evaluation their own learning” (p. 2). Adults also use life experience to motivate themselves to learn based on internal rather than external factors. Most adults learn by doing; they are problem-solvers and motivated by solving real-life problems (TEAL, 2011).

Transformational learning. The final foundational theory is transformational learning theory and its premise that adults can adjust their thinking. Transformational learning theory acknowledged change is constant and it is imperative people reflect, negotiate, and construct learning in ways allowing for new and revised meaning (Taylor, 2017). Knowledge, beliefs, and values are learned over time and reflection and exploration assist adult learners in acquiring new skills. The foundation for the theory is that learners can and do make new meanings (Waltman, 2000). When applied, this theory provides opportunity to critically analyze assumptions, consider a variety of often diverse viewpoints or situations, and engage in critical discussion (WGU, 2020).

Statement of the Research Problem

Companies providing professional development commit to supporting employees and managers by giving them new tools necessary for both personal and organizational success. However, in the current era pushing for greater efficiency and return on investment, many employers are cutting costs resulting in reduced employee professional development (Kaplan, 2017). Thus, many employees miss the opportunity to increase their workforce skills, limiting their chance of advancement.

In the education field, most professional development dollars are spent on increasing teacher skills. The U.S. Department of Education created the National Awards Program for Model Professional Development to recognize districts for their success in designing and providing professional development to faculty and staff (Hassel, 1999). Awards like these are focused on teachers and few, if any, are extended to classified managers whose jobs are critical to district success.

Professional development is predominantly reserved for faculty and educational support staff (e.g., instructional coaches, teaching assistants, paraprofessionals). Training provided to certificated staff has often followed the guidelines of the federal No Child Left Behind Act (NCLB) of 2001, which required school districts to provide a high-quality education so all students could reach proficiency and be prepared for college and careers (U.S. Department of Education, n.d.). The Every Students Succeeds Act of 2015, which was signed into law by President Obama, included a definition for professional development centred on a sustained experience of building educator capacity to help students achieve academic standards (Crow, 2015).

School district classified management lack opportunities to engage in professional development and are often overlooked due to the focus on teachers (Champion, 2003). Without leadership training and development, when the opportunity comes to serve in a management role, they are not prepared with the skills necessary to perform their job or advance their careers (Champion, 2003). The professional development opportunities organizations offer are typically optional and historically employees have not been included in identifying the needs or design of the program. Often, opportunities for classified staff were skills specific to their current role and not reflective of management skills necessary to be successful at the next level. This lack of training is detrimental to individual success and career trajectory, and negatively impacts the school district.

Although classified employees are important to school district success, little research exists about the need for training and the important role they play in district success. The most important asset to any organization is their employees, and training, development, and education are crucial to employees and their success with the company (Choy, Chen, & Buggarin, 2006). Keeping employees engaged, motivated, and trained are a priority for most companies and should be a priority for K-12 school districts (Kaplan, 2017). Professional development for classified personnel is imperative to gaining new work-related and leadership skills that prepare them to become effective supervisors and managers (Sutherland Olsen, 2016). Despite a great deal of research on professional development within California public school districts, most focuses on teachers and paraeducators leaving a gap in the literature related to professional development for classified employees.

Professional development opportunities motivate employees to work in new ways and promote creativity in the workplace (Kaplan, 2017). Providing a planned and systematic program of professional development, including leadership training, improves operations at all levels of the school district. Professional development offers staff opportunities to develop new knowledge and skills, resulting in a deeper commitment to their jobs (Kaplan, 2017). Research about classified professional development and specifically for classified managers is limited to non-existent. This gap serves to hold classified staff in place and keeps them from growing into their potential and therefore holds back the ultimate success of school districts (Guskey, 2009).

Purpose Statement

The purpose of this Delphi study was to identify and describe professional development topics required to prepare classified managers in a California school district business services department as effective leaders, as perceived by a panel of experts. This study also sought to identify the degree of importance of each professional development topic and the best strategies to address those topics, as perceived by a panel of experts.

Research Questions

The following research questions (RQs) guided this study:

1. What do experts in providing professional development identify as the professional development topics required to prepare classified managers as effective leaders in school districts?
2. How do experts in providing professional development rate the importance of each of the professional development topics identified in RQ 1?

3. For the professional development topics identified as most important in RQ 2, what professional development strategies do experts identify as most impactful in addressing these topics?

Significance of the Problem

Traditionalists and Baby Boomers remained in their careers and stayed loyal to their companies, often starting and retiring with a single organization (Kammien, 2017). As more Millennials and Generation Z entered the workforce, employee retention became an issue as these generations often moved from job to job looking for better opportunities and advancement (Sarpong, Skinner, & White, 2018). To enhance employee well-being, decrease turnover, and encourage job engagement, strategies need to be implemented targeting classified management (Rhoades, Heggstad, Malone & Clark, 2019).

Today, all employees need the opportunity to upgrade specific work skills on an ongoing basis to improve their potential to serve in a leadership role. According to Fraut (2000), learning is a continuum with formal learning at one end and informal learning at the other. Formal learning focuses on traditional education through schools whereas informal learning stems from daily activities, experiences, and interactions with more seasoned professionals (Tissot, 2008). In the public school system, as in organizations, formal and informal training is needed (Movchan, 2018). Traditionally, classified employees in school districts received formal and informal training related to the skills needed to perform their assigned job, but not related to leadership.

According to Unboxed Training and Technology (2022), many delivery modalities exist along the formal-informal continuum, including podcasts, infographics, animations, group discussions, interactive training tools, instructor led trainings, virtual

trainings, videos, on-the-job training, mentoring, and job shadowing. The website authors discussed the importance of matching the right modality to content and outcomes. The Covid-19 pandemic heralded a necessary and significant rise in virtual learning and professional development. *The Future of Learning Report 2022* posited that many learners prefer the option of hybrid or blending learning, which combines in-person delivery with online learning (Fran, 2022).

According to Lovell (2004), classified employees are rarely provided opportunity to engage in formal training to prepare them for a supervisor or management position. Without this opportunity, employees are often ill-prepared to be successful in a management role when promoted (Kuligowski, 2019). This study provided valuable insight into the professional development necessary to prepare classified personnel for leadership roles in their school districts. Further, it offered professionals who conduct training for classified managers guidance in planning programs beneficial to the individual and organization.

Organizations are searching for a new brand of leader (Wang & Hsieh, 2013). They are looking for managers who engage with their employees and communicate the goals of the organization. Organizations also yearn for engaged employees, often spending substantial resources to measure and improve engagement (Xu & Cooper Thomas, 2011). Part of engaging employees is training managers to communicate with staff. Thus, this research benefited the broader training field by providing professional development strategies to build manager skills.

Definitions

Business services department. Staff responsible for the areas of payroll, billing, accounts payable, operations, transportation, and purchasing within a school district.

Classified manager. An administrator holding responsibility for supervising and evaluating non-certificated people within a school district.

Classified staff. District employees who do not require certification or a credential. Classified staff consist of paraprofessionals, librarians, office/clerical support, custodians, bus drivers, cafeteria workers, and business services department staff.

Professional development. Professional development refers to skill building activities for staff designed to improve the staff member individually and the overall organization (Winston & Creamer, 1997).

Delimitations

Delimitations refer to constraints placed on a study by the researcher to narrow its focus (Creswell & Creswell, 2018). This study was delimited to experts who provide professional development to classified managers in school districts and was narrowly focused on business services personnel. Additionally, the study was delimited to experts serving school districts in California in the area of professional development.

Organization of the Study

This study is organized into five chapters. The first chapter introduced the study, along with the purpose statement, research questions, significance of the study, definitions, and delimitations. Chapter II presents relevant literature, including the history of professional development and the role of professional development in schools and districts. Chapter III details the study methodology, including the research design,

population, sample, instrumentation, data collection process, and data analysis procedures. Chapter IV presents the study findings. Lastly, Chapter V discusses the conclusions based on the findings, as well as implications for action, recommendations for future research, and concluding remarks from the researcher.

CHAPTER II: REVIEW OF THE LITERATURE

“Education is the wise, hopeful and respectful cultivation of learning undertaken in the belief that all should have the chance to share in life” (Smith, 2015). Education is defined as helping people to learn. Education is a process of truth and the possibility of discovering what formula is needed to increase knowledge. Research is limited on how that formula is applied to growing, supporting, and developing classified staff through education and learning opportunities. The purpose of this study was to identify and describe professional development strategies necessary to prepare classified managers in school district business services departments as effective leaders. This chapter examines literature related to the structure of school districts, the role of classified management staff, and the history, foundations, and literature related to professional development.

School Districts in California

Types of Districts

California has three types of school district configurations, elementary serving kindergarten through 8th grade, high school serving 9th through 12th grade, or unified serving kindergarten through 12th grade (California Department of Education [CDE]; 2022). A joint school district serves more than one city or county (Sable & Hill, 2006). Unified is the most common school district type in California (Sable & Hill, 2006).

School districts serving fewer than 1,000 students often lack the same staff as larger districts, and small districts may share costs and resources with surrounding districts or the county office of education (Koran, 2019). Given small districts serve fewer students, they receive less federal and state funding, presenting unique challenges.

Larger districts have many functions and more funding. They receive grants, bonds, and average daily attendance (ADA) funds from the state that increases revenue (Weston, 2010). With more students, the revenue generated by ADA is significant. Larger districts can staff at higher ratios, which allows greater flexibility to offer more student programs. Larger districts are predominantly unified school districts offering more grade levels (Batton, 2010). Overall, most school districts receive federal, state, and local funding to support their students (Public Policy Institute of California, 2018).

Organization of School Districts

The school board is the legal entity charged with governing a school district. The school board is responsible for setting the district vision and mission, establishing the district structure, overseeing accountability systems, and upholding high standards of conduct (Minnesota School Board Associations, 2017). One school board expectation is to set a clear vision statement to drive the goals and intended outcomes and allow the board to monitor progress and assess success. The school board is accountable to the community as they are typically elected officials. The school board often consists of five to nine elected members who adopt a shared vision and goals, monitor systems and processes, ensure progress and accountability, advocate for students and their constituents, and hire, evaluate, and fire (as necessary) the superintendent. They also delegate routine operations of the district, including personnel matters (Batten, 2010).

Board members are assigned duties within the general governance area and may participate in educational workshops, conferences, and trainings. They provide clear expectations to the superintendent to ensure board policies are followed (CDE, 2019). They are expected to attend public board meetings and participate in developing the

agenda. The board prioritizes financial understanding and oversight and ensures the district is audited annually. The board is tasked with establishing educational goals, adopting instructional programs, and reporting to the community how students are performing. The board promotes a good working relation with staff and ensures the district maintains good community relationships.

Under the direction of the superintendent, there is often an assistant superintendent of human resources and an assistant superintendent of instruction (or titles who perform these duties). There is also generally a chief business official (or similar title) who handles the budget and district finances. At school sites, principals are the main instructional leaders and focus on their own sites; their role is to meet state educational standards and maintain the physical campus in terms of discipline, school culture, and health and safety of everyone on the campus. In most school districts, the principal ensures professional development activities for teachers and classified staff at their school site (Kotting, 20220). Figure 1 is one example of a typical school district organizational chart that illustrates the role of staff and the board.

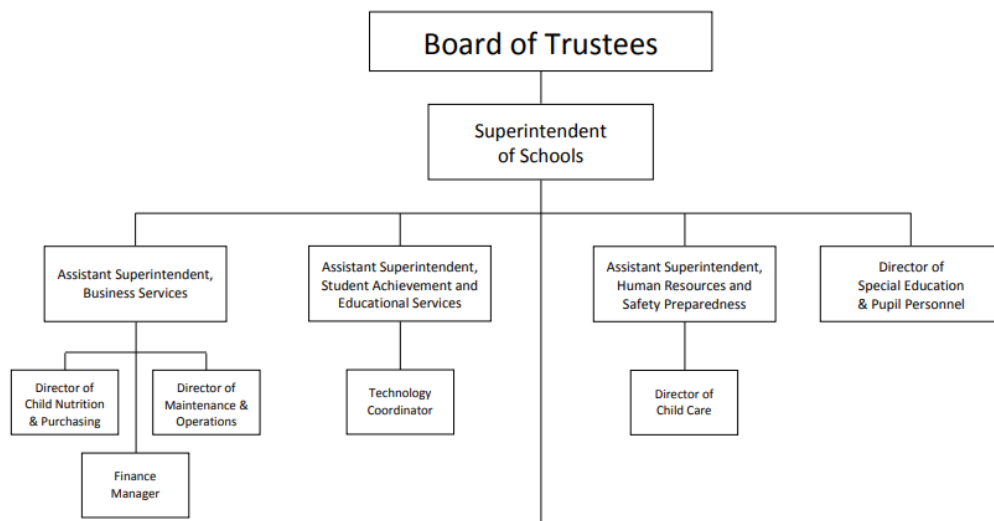


Figure 1. A school district structure.

Overall, the board members are responsible for negotiating collective bargaining agreements. In addition, they hire and evaluate the superintendent, who is responsible for the day-to-day management of the district (Heibutzki, 2019).

The Superintendent Role

The superintendent is an influential position who is responsible for overseeing the daily operations of a school district (Houston, 2002). Superintendent responsibilities include ensuring board policies and directives are implemented, overseeing student achievement, coordinating school operations, planning instructional programs, and managing personnel. Additional duties include reporting the needs of the district to the board and keeping them apprised of state and national developments (CDE, 2019). In some circumstances, the superintendent is responsible for recommending the dismissal of certificated and classified staff and may serve as a non-voting member of the board.

Roles that exist in districts (depending on district size) to support the work of the superintendent and the goals of the district include deputy superintendents, chief business officials, chief academic officers, assistant superintendents, and directors. These positions oversee specific parts of the school district operations. Often titles of chief, deputy, and assistant superintendent are cabinet level positions vital in supporting the superintendent in the work of the district. In addition to the board members, the superintendent serves as the district's educational leader and spokesperson (Heibutzki, 2019).

Administrative Divisions and Departments

Although districts are comprised of various departments (e.g., human resources, educational services), this study focuses on the business services department. The following sections describe the roles of different departments.

The Human Resources Division

The human resources division is responsible for recruiting and hiring staff, including teachers, paraprofessionals, and classified staff (Wheeler, 1956). The Center for School Change (1999) described human resources as critical to a district because they recruit, onboard, train, terminate, and otherwise support the staff. They are often responsible for negotiating compensation and benefit packages and serve as a first-level support during conflicts among staff. The leader of this division works to resolve issues between management and employees, including disciplinary issues.

The Educational Services Division

The educational services department is organized by the director of instruction. The department is responsible for overseeing instructional aspects related to teaching and learning, including community relationships and student social-emotional health and well-being. CDE (2019) highlighted the importance for school districts to improve students learning and build their knowledge to achieve state standards. Under the educational services umbrella, different departments handle the structure of teaching students. This may include the special education department, gifted and talented department, English language learned department, and after school programs intended to offer individualized support and equitable access to learning (Lecompte & Dworkin, 2002). The educational services division creates and provides opportunities for faculty to assess students and thus provide knowledge on how to enhance student academics and critical thinking. They are also responsible for curriculum development and evaluation (Grannan & Calkins, 2018).

The Business Services Division

The division of business services is organized by the highest-ranking fiscal leader (e.g., chief business official, deputy superintendent, assistant superintendent of business). He or she may have one or more directors, depending on the size of the district, to oversee different departments. Some typical director positions in the business services division include oversight of fiscal services (e.g., payroll, accounting), transportation, maintenance and operations, purchasing, and food services. These departments strive to support student learning by maintaining operations, fiscal solvency, and transparency.

The various departments in the division work together to ensure all areas of business services are met (Lecompte & Dworkin, 2002). The department is responsible for developing and monitoring an annual budget that is often in the millions. The departments within the business services division are responsible for implementing and administering business procedures in support of district programs. The department has different functions that branch out from the business office to maintenance and operations, purchasing, accounting, payroll, and warehouse. Working together, these departments provide leadership and guidance of the district (CDE, 2019).

It is the responsibility of the chief financial officer (CFO) to ensure school budgets are accurate and to maintain financial stability so the district is solvent (Harris, 2007). The position coordinates and balances budgets and oversees salary and retirement payments. CFOs analyze financial reports and participate in annual audits that review the different district programs. The CFO provides support for various departments within the school district, oversees contract negotiation support for all employee groups, and manages the business service division and its various departments (Harris, 2007).

Payroll. Under the direction of the CFO, the payroll department is responsible for calculation and disbursement of employee payroll and processing and auditing employee time records. The department monitors budgets for a variety of programs within the school district. The payroll department supports all employees by ensuring they are paid correctly and on time, including sick leave and vacation pay (Bonk, 2007).

Accounting. The accounting department is responsible for the day-to-day financial activities. They are responsible for financial functions including accounts payable, accounts receivable, and attendance accounting (Central School District, 2019). The accounting department completes financial analyses and reports for the CFO and school board. Within the accounting functions, they implement financial controls for billing, receiving, and recording funds. They work to ensure expenditures and revenues follow the guidelines, laws, and regulations related to the financial administration of public school districts (Chino Valley Unified School District [CVUSD], 2019).

Purchasing. The purchasing department is responsible for obtaining, managing, directing, and distributing resources from the district warehouse. They ensure departments and schools receive all their materials needs with books, paper, and other supplies. They are expected to provide a high level of customer service when providing requested materials. They also provide warehouse operations and inventory control by following federal and state laws, codes, regulations, and district policies and practices (Chaffey Joint Union High School District, 2018).

Food services. The food services department oversees the nutrition and meals for children of the district. They analyze nutritional values and monitor food safety by following federal and state laws and regulations, state and local health ordinances, and

school district policies. They administer student meal programs by implementing menus and recipes to provide nutritious food for the various schools (CVUSD, 2019).

Facilities. The facilities department is responsible for all planning, development, funding, and construction of new facilities, as well as the maintenance of existing facilities. They oversee the modernization of outdated facilities and janitorial services to the schools. They work closely with the state department of education, office of public school construction, and other agencies to ensure buildings are safe and clean.

School District Staffing

Certificated staff. Certificated staff are professional education personnel consisting of teachers, curriculum specials, and guidance counselors. Classroom teachers are the main instructors within schools. They must hold a college degree, pass a teaching assessment, and earn a multi- or single-subject teaching certificate (Kaye, 2015).

Teachers are generally responsible for student achievement as they are the ones interacting with students each day to provide instruction, assess learning, and re-teach as needed to ensure students understand the content. Teachers are also often responsible for areas outside of academics, such as social-emotional learning and school culture.

Classified staff. Classified staff consist of school employees without certification or a license to teach. Classified employees are essential to schools as they ensure classrooms are clean, food is prepared, and students are supported. They include office personnel, custodians, food service employees, bus drivers, librarians, paraeducators, and computer technicians (CSEA, 2018). According to CSEA, classified staff serve as liaisons between parents, teachers, and administrators. They are an essential part of the daily life of a student outside of classroom instruction. Classified support staff enhance

the work of teachers, and some classified positions need special skills or certificates to perform their job (CESA, 2018).

Certificated and classified leadership. According to Stephen R. Covey (2010), founder of the Franklin Covey planner and leadership system, “There are four essential roles of leadership, which is the framework for success for leaders everywhere” (p. 2). The first essential role is inspiring trust as leaders must be credible and viewed as competent. The second role is creating a clear vision as teams must know where they are heading and how they will get there. The third role is executing a strategy, which includes achieving results with and through the team. The last essential role is coaching to unleash the ability of each person on the team to improve performance, solve problems, and grow in their careers (Covey, 2019).

The role of a leader takes time and patience, and the outcome should be rewarding for all members of the team. Using the four essential roles of leadership, leaders develop and master the skills consistently. Building trust develops character and competence, as does executing the vision and strategy to completion. Developing leadership potential in others improves performance through consistent feedback and coaching (Covey, 2019).

Professional Development

Professional development is “a comprehensive, sustained, and intensive approach to improving teachers and principal’s effectiveness in raising student achievement, and may be supported by activities such as courses, workshops, institutes, networks, and conferences” (Wei, Darling-Hammond, Andree, Richardson, & Orphanos, 2009, p. 4). This section explores professional development, theoretical frameworks, and the effects of environment, as well as understanding the continuum of positions.

Hassel (1999) defined professional development in terms of improving student educational outcomes, although the definition was limited in scope. Professional development in the workplace improves staff capabilities (Business Dictionary, n.d.). The process can include training, formal education, or advanced professional learning. Professional development typically involves ongoing learning, often used by school districts to ensure teachers stay current on content and pedagogy (Mizell, 2010).

Types of Professional Development

Professional development allows employees to excel in all aspects of work life (Dufour, Dufour, & Eaker, 2006). DuFour et al. (2006) described professional development as an opportunity for educators to focus on learning rather than teaching. Professional development includes mentoring, continuing education, publishing, shadowing others, presenting, and conducting research, and these avenues provide employees with different sources of professional development (Advanced Leadership Development, 2018). According to Board Developer (n.d.), mentoring is the most powerful professional development opportunity. It helps the mentor and mentee learn new skills and broadens their perspectives. With both non-directive and directive learning, employees can mentor others in the same department or in different departments. Another form of PD is continuing education, which may include pursuing a formal degree or taking courses and workshops for credits. Prior to the COVID-19 pandemic, online offerings were an emerging field whereas during the pandemic these online offerings provided innovative solutions for people sheltering in place (Board Developer, n.d.).

For those involved in the research field, publishing is a more attractive than professional development (Advanced Leadership Development, 2018). It allows colleagues to partner with others in the same field to publish articles. This also allows others to read the work of professionals in the field and expands the field, particularly from the voice of practitioners. Another quick and easy way to learn and engage in professional development is shadowing others in their field. Staff can shadow an employee to learn first-hand about the job process. This creates the ability to learn more about the daily functions of a role and ask questions with immediate feedback. Participants can see what to expect in the job. Another option for professional development is for employees to work together with experts on developing a presentation. This benefits those involved in the preparation and those receiving the information. Finally, in some organizations research is conducted by the employees. This might include searching for ways to save the company money on equipment or how to allocate funds to certain departments (Advanced Leadership Development, 2018).

Role of Professional Development

Professional development is a critical need across all industries to prepare the workforce to perform at high levels and to grow knowledge that provides individuals advancement opportunities (Gerken et al., 2016). Professional development is also tied to increasing the effectiveness and results of employees and the organization. According to Project Learning Tree (2019), which focuses on high quality learning for professionals, the following principles should guide professional development: more is better, clarify and prioritize outcomes, create collaborative and reflective learning communities, and embrace digital and online tools. They go on to address five core features of professional

learning “integrated content and pedagogy; coherence with standards and policies; active learning opportunities; mentoring/coaching/apprenticing; and individual learning” (Project Learning Tree, 2019, para. 7). Professional development for classified staff has the potential to provide knowledge, competency, confidence, and career advancement (Desimone, Porter, Garet, Yoon, & Birman, 2002; Yoon, Duncan, Lee, Scareloss, & Shapley, 2007).

Outcomes of Professional Development

Leading a team that manages itself requires a unique approach to leadership (Courtright, Fairhurst, & Rogers, 1989; Manz & Sims, 1987). Managers at a district office are responsible for ensuring all schools and departments receive enough support. Their focus is to support smooth running operations so schools and departments can focus on the children. Research found the lack of legitimate control over team actions and decisions, and the large number of teams for which an external leader is responsible, makes the role more complex and demanding than that of traditional team leadership (Beyerlein, Johnson, & Beyerlein, 1996; Hackman, 1986). Leaders must have the traits and courage to make decisions centered on the organization and fulfill the purpose of their role. It is the responsibility of the leader to set the team’s vision and bring it to fruition (Welch, 2005).

Professional Development in School Districts

Guskey (2000) stated, “Professional development is defined as those processes and activities designed to enhance the professional knowledge, skills, and attitudes of educators so that they might in turn, improve the learning of students” (p. 16). Some districts form professional learning communities (PLCs) to facilitate ongoing learning.

PLCs collaborate toward shared and personalized goals with the aim to benefit students (DuFour, DuFour, Eaker, & Many, 2006). The focus of professional development in K-12 schools is primarily centered on teacher and student learning. According to DuFour and Fullan (2013), learning occurs best when it is job embedded and within the context of the work rather than via external workshops pushing content via presentations.

The work environment can cause stress. When individuals experience occupational upward mobility, they still face challenges stemming from different-social, economic, and culture resources; class bias; or a sense of emotional dislocation-(Ashley et al., 2015; Friedman, 2016; Lareau, 2015; Rivera, 2015; Skeggs, 1997). Professional development provides opportunities to share ideas, learn from one another, and develop their leadership role within the school community (Beaty & Pankake, 2003). Professional development provides opportunities for both administrators, managers, and staff to participate in training, which focuses on collaborative teams and professional learning groups. Administrators and managers have opportunities to work with other colleagues and discuss best practices and how to implement them with their staff.

According to Kerns (2005), “Without a positive connection between work and organizational purpose, what we do each day becomes less meaningful” (p. 831). Creating a successful environment means setting values and acting ethically. A leader must link the results of the enterprise and its people to the organization’s purpose (Tiwary, 2015). Structure within a school district consists of administrators, educators, and classified employees responsible for students and their academic success (Heibutzki, 2019).

Barriers to Professional Development

Barriers exist for implementing professional development. Identifying them and finding solutions improves the outcomes for those seeking additional guidance in their field. One barrier is time limitations, as professional development may require shifting so people can participate (Caffarella & Zinn, 1999). Another barrier is lack of financial support as some organizations lack training budgets to help their staff (Geale, 1995). Peach (1998) talked about organizations lacking a culture of learning and noted organizations that do not focus on personal development also do not encourage job security, ambition, or job satisfaction. Major (1998) also identified the costs and value when companies are pressured to choose from using an already strapped budget to pay for professional development, noting there was constant change within companies and school districts only funded essential needs.

Teacher Professional Development

In 1993, there were at least 86 teacher training programs (Morra, 1995). The purpose of these programs was to train a person to enter the classroom and offer different services to students. In most districts, professional development was limited to a few days of the year and was only provided to teachers (Corcoran, 2000). Workshops consisted of teachers listening to a lecturer for hours with no interaction with others (Little, 1995). Although activities provided varied, some teachers feel it was a waste of their time because the activities did not match what was happening in their daily teaching, which was a disadvantage to students (Fullan, 1995; Guskey, 1995, Joyce & Showers, 1995).

It has become increasingly popular for teachers to acculturate to their new careers (Keaney, 2017). Induction programs are built as a model for others to follow as best

practices for other schools could build upon or enhance current programs within the schools. Part of the induction and purpose of the programs is to have a common thread and congruency with students (Keaney, 2017).

Theoretical Foundations

A variety of learning theories inform the world and work of professional development. Three general learning theories are at work within professional development: behaviorism, cognitivism, and constructivism (McLeod, 2021). In Figure 2 the three learning theories are outlined and compared, along with the theories of connectivism and andragogy.

THEORIES	LEARNING CONTEXT & PROCESS	LEARNER'S ROLE AND PLACE		HOW LEARNING OCCURS/OUTPUT
BEHAVIORISM Teacher-centered Teaching centered on what & how	Stimulus Classical conditioning Operant conditioning	Reaction [positive or negative]	Positive reinforcement Negative reinforcement; Experience is viewed as educative	Learning is sequential, learners are viewed as robots Content-oriented
CONSTRUCTIVISM Learner-centered Learning centered on why, what & how	Sociocultural environment (family, community, society)	Learner's agency is emphasized; task-based	Prior knowledge is important; similar to connectivism and andragogy; output implies adjustment; Experience is viewed as educative	Learning doesn't have to be sequential or linear; task-based learning (Eg.: communicative language teaching or task-based language learning)
COGNITIVISM Learning centered on why, what & how	Emphasis on thought process -mental process Critical role of the environment; perception, behaviors or actions are rooted in experience and a thought process	Learner's agency is important (like behaviorism); Prior knowledge also important; task-based	Amount of information can influence ability to retain information (cognitive load); information representation & retrieval (Computational linguistics); experience is viewed as educative	Zone of proximal development is important in skill development; problem solving
CONNECTIVISM Learner-centered Learning centered on what & how	Learning occurs in a network/group; significance learning through new technologies (Facebook, online learning communities)	Learner's network influences his/her ability to access to information through social network (similar to social capital); task-based	Learning is dynamic and changes according to network; network expansion depends on learner's dynamism; learner's experience is viewed as educative	As network expands, individual can increase knowledge; rich network implies richer knowledge and poor network poorer access to information
ANDRAGOGY Learner-centered Learning centered on Why & what	perception, behaviors or actions are rooted in experience and a thought process;	Emphasis on why learning is happening	Problem-oriented (like cognitivism & constructivism) Experience is viewed as educative	Not content-oriented; i.e; oriented toward learner's objectives

Figure 2. Illustrates and compares behaviorism, constructivism, cognitivism, connectivism, and andragogy. Source: West African Learning Center.

General Learning Theories

McLeod (2021) stated behaviorism is “an orientation to learning emphasizing... events and constructed environmental conditions” to bring about a particular response and cognitivism is that learners “develop learning through receiving, storing and retrieving information” (p. 35). The third general learning theory is the broad umbrella of

constructivism. Some examples of this include experiential learning, self-directed learning, and reflective practice. The key touchpoint for the theoretical foundation of this study is adult learning theory, andragogy, which describes self-directed and transformational learning.

Adult learning theory. Most adults need to know why they are learning and learn by doing. The skills provided to adults are explanations of why specific concepts are taught. Adults respond to learning about performing tasks and prefer self-directed approaches allowing them to discover things on their own (Rutgers, 2016).

According to Anderson and Ackerman-Anderson (2010), “Understanding what drives change is critical because the ‘drivers’ establish the overall context within which any organizational change occurs” (p. 31). Leaders and staff behaviors drive culture and thus both groups must change their behaviors to alter organizational culture. Changing behaviors can be accomplished through professional development, which encompasses coaching, training, communication structure, and mentoring. Professional development is critical and can provide a resource to improve through appropriate skill development and conflict resolution. Training can provide the necessary tools to help managers build a successful relationship with their staff. Approximately 70% of adult learning is self-directed (Cross, 1981; TEAL, 2011), and about 90% of all adults conduct at least one self-directed learning project a year (TEAL, 2011; Tough, 1971).

Over the last 120 years, learning theories evolved; however, the need for adult learning has not changed. Since the 1900s, behaviorism focused on behaviors acquired through conditioning (Adult Learning Australia [ALA], 2023). According to ALA,

learning theories help explain complex processes and how adults process information.

Figure 3 shows different learning theories that help adults learn.

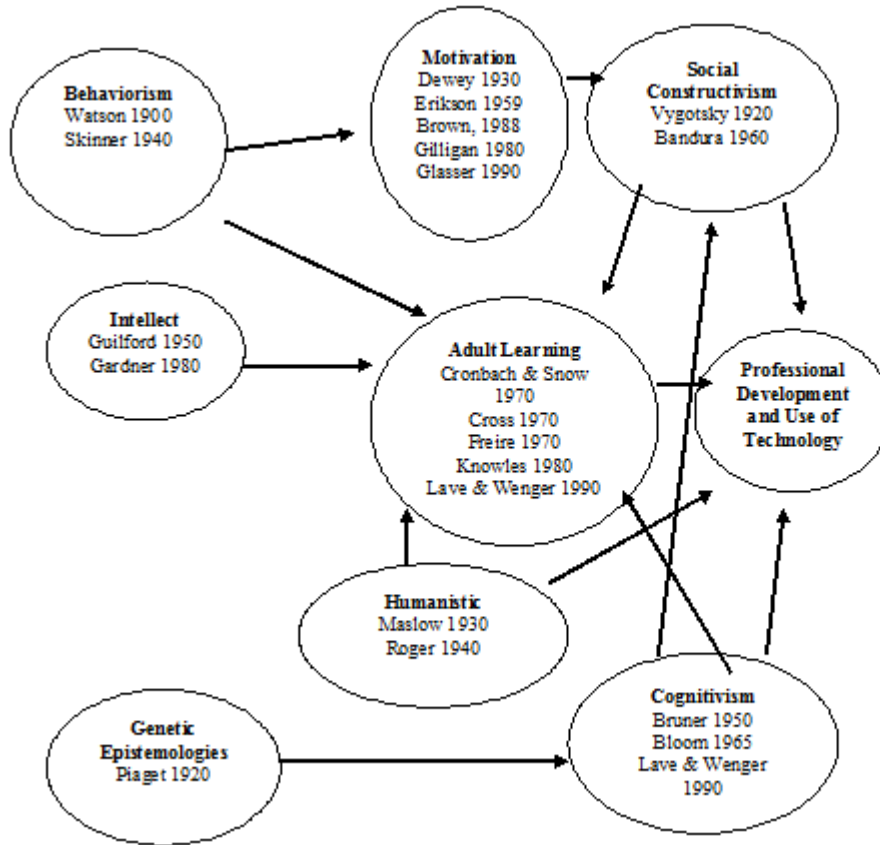


Figure 3. Evolution of adult learning theories.

The theoretical foundations for professional development come from adult learning theories and one of the seminal authors was Malcom Knowles. Knowles (1980) cited the work of Cyril O Houle in 1961 to state that adult learners fall into three sub-groups: goal oriented, activity oriented, or learning oriented. The 1960s was a time when researchers were accumulating knowledge about how adults learned, and they related this work to the disciplines of clinical psychology, developmental psychology, gerontology, sociology, and anthropology. As time progressed, these disciplines and this exploration

the work began to center on three major theories: andragogy, self-directed learning, and transformational learning (Knowles, 1980).

Andragogy. Andragogy is a theory originally documenting the difference between adult and child learning (TEAL, 2011). In this theory, adults move from dependency to self-directedness, and it was shown that adults have a deep psychological need to be self-directed (Knowles, 1980). Knowles ascribed to adults within andragogy learning theory principles such as self-concept, experience, readiness, problem-centered orientation, internal motivation, and a need to know.

Self-directed learning. The second theoretical foundation, self-directed learning theory, was also developed in the 1960s and is attributed to the work of Dr. Huell, built on later by Allen Tough and Malcom Knowles (Sangiuliano, 2000). This includes the ideas of self-planned learning, self-teaching, and self-direction, which are connected to self-concept. According to Sangiuliano (2000), self-directed learning requires self-reflection in which people determine their learning needs, create and implement a learning plan, and assess their growth. They also use life experience to motivate themselves to learn based on internal rather than external factors. Most adults learn by doing; they are problem-solvers motivated by solving real-life problems (TEAL, 2011).

Transformational learning. The final foundational theory is transformational learning. In the transformational learning theory, change is constant and it is imperative people reflect, negotiate, and construct learning in ways allowing for new and revised meanings (Taylor, 2017). Knowledge, beliefs, and values are learned experiences over time and reflection and exploration assist the adult learner in acquiring new skills and

knowledge. The foundation for the theory is that learners make new meanings (Waltman, 2000).

Additional Related Theories

Self-directed learning theory. Self-directed learning theory offers instructors the opportunity to personalize the learning environment for each learner. Instructors provide additional resources and support for students to learn additional content (Guskey, 2007). They personalize objectives to assist students on how to master learning.

Content active learning theory. Content active learning is a theory developed by philosopher Jean-Jacques Rousseau in 1762 (Internet Encyclopedia of Philosophy, n.d.). Understanding the specific practices and ways members of the school community work interdependently and harmoniously is essential in creating an effective organization (Evans, 1996). Senge (1990) stated, “You cannot have a learning organization without a shared vision” (p. 209).

Cognitive theory. Aaron Beck described cognitive theory as the role of cognition, which determines and predicts the behavioral pattern of individuals. He went on to say individuals form self-concepts that affect their behavior. Man is like an animal and has no choice but to adapt to their environment (Zimmer, 1999).

Behavior theory. Skinner believed he could change the behavior of an animal, as well as human behavior. Skinner described how human beings lack self-determination and personal responsibility. Behaviorist theory was founded by J. B. Watson, and his new approach to psychology emphasized verbal behavior. He also stated human behavior is an observable stimulus-response interaction of learning (Demirezen, 1988).

Multiple methodologies and approaches are often used in professional development. Although the literature on professional development for classified positions in school districts is scarce, some strategies focusing on professional learning are outlined in the next sections.

Professional Development

Types of Professional Development

On the job training. On-the-job training, also known as OJT, is a method of teaching skills, knowledge, and competencies needed for employees to perform a specific job within the workplace (Heathfield, 2019). During their training, employees learn in an environment allowing them to learn and practice new skills. Employees use their current workplace tools, machines, and equipment to teach other employees how to do their job. Training takes place within the normal job environment and occurs while performing actual work. Other training takes place onsite using dedicated training rooms or workstations (Heathfield, 2019).

According to Gallup (2020), employees experiencing burnout often stated they were treated unfairly at work. Unfair treatment included bias, favoritism, and mistreatment. When managers do not provide clear directions on how to effectively do a job, work becomes frustrating and exhausting. Expectations and accountability need to be clear and consistent. Gallup (2020) also noted lack of manager support can have a psychological impact on employees. Employees perform better when they are supported and know their manager has their back. Employees learn on the job and success is more likely if the employee is treated with dignity and respect.

First-hand experience is learning from doing with support of a coworker or supervisor, the type of OJT involving hands-on work. It is important to shadow or observe an experienced employee. The purpose of the OJT is to prepare the employee to develop the skills, confidence, and knowledge to carry out the job without supervision (Indeed.com, n.d.).

Collaborative learning. Collaborative and social interaction offer different forms of teaching and learning. Many courses are constructed for individual learning, making it difficult to collaborate with others. Collaborative learning depends on the knowledge of the individual. According to Brufee (1993), knowledge of learning has changed and classrooms are emerging with more deep-thinking strategies. Collaborative learning can be an important component in today's classroom. Collaborative learning allows people to share knowledge while inviting other adults to build greater understanding (Brufee, 1993).

According to the Center for Teaching Innovation at Cornell University (2022), collaborative learning can be facilitated in large groups or in pairs. Through peer instruction, employees develop higher-level thinking, oral communication, self-management, and leadership skills (Cornell, 2022). Employees can benefit from working together through cohesion by using teambuilding and reflection exercises.

Coaching and mentoring. In today's working world, employees want to be coached in their positions. Gallup (2021) showed only one in three managers had the opportunity to grow in their position. Gallup (2021) stated coaching should be practical and approachable. Coaching includes asking employees how a manager can better serve their ability to communicate and support them. Coaching involves listening to employee

goals, challenges, and needs. Good coaching involves employee engagement, performance, and development (Kar & Watkinson, 2021).

According to the American Psychological Association (APA, 2023), mentors are role models and support systems for the mentee. Mentees need guidance in specific professional areas aligned with a career development plan. According to MindTools (n.d.), communication skills give the mentor an opportunity to provide new ways to approach different situations and offer valuable guidance from more experienced people.

Expert support. Managers are supposed to delegate duties, not perform those duties (Tiwary, 2015). The relationship between employees and managers should not be top down but instead be built on mutual trust (Harvey & Drolet, 2005). Mutual trust is not an act or set of acts but the result of other actions or variables. One way managers create trust is being present and providing expertise and support to grow employee skills, knowledge, and competency (Craig, 2018).

Levels and Types of Professional Development in School Districts

Advanced Leadership Development (2018) describes several types of professional development, including mentoring, continuing education, publishing, and presenting. Mentoring is a powerful opportunity that can benefit the mentor and mentee. Pairing employees in the same department allows them to create a relationship, share their skills, and learn what practices work best. Continuing education is a form of professional development that enhances employee resumes while gaining skills to develop in their position. Publishing provides opportunities for employees to partner with their colleagues and publish articles to assist others with best practices and resources. Similarly,

presenting allows employees to collaborate and present in front of groups of people, sharing their experiences and knowledge.

Professional Development for Classified-Leaders/Managers

Although the mission of schools and school districts remains centered on the health, safety, wellness, and academic success of students, an additional mission must be to grow and develop employees (Johnson, 2020). The growth and development of credentialed staff is often prioritized whereas classified employees who fulfill a large number of roles necessary for the ultimate success of a school are rarely similarly prioritized (Johnson, 2020). “Success will belong to those organizations who define return on investment not only in terms of profit and loss but also as the development and aggregation of human and intellectual capital” (O’Leary et al, 2002, p. 325).

In 2013, Senate Bill 590 was passed providing professional development for classified school employees. Section 1, Article 9.5 (commencing with Section 45390) states classified school employees play a vital role in the education of students and thus have the right to professional development and training. According to the language of California Education Code 45390, classified school employees need professional development and training due to the many vital areas in which they serve in school districts (CDE, 2019). Student-centeredness is the focus of a school district, yet work must also be on the development of the human capital of classified staff. O’Leary et al. (2002) revealed current trends of organizations investing in human capital as they invest in other forms of capital.

In her 2012 study on classified employees and job satisfaction, Barakos-Cartwright confirmed both the need for and lack of professional development for these

employees. She also noted the perception among administrators and classified employees that districts emphasized professional development opportunities for classroom educators. The voice of classified employees from this study reiterated how they feel valued when professional development is provided for their growth and benefit.

In an informal review of 32 web pages from school districts within San Bernardino County, the researcher found a vast range information related to classified professional development. In 18 districts, professional development offerings cited on the website were primarily for credentialed staff with minor references to classified staff. The remaining 14 districts had nothing on their pages related to professional development for classified employees, although it is possible robust professional development may be present without the ability of the public to view it on the district's web page. Yet, all 32 districts had information on professional development for certificated staff. Teachers are provided several trainings and induction programs for learning within the district. The focus within one district was to provide programs for pre-k through 12 teachers on assessments, district goals, curriculum, instruction, and state mandates. Another district offered teachers access to programs outside the district for professional development, yet similar offerings were not available for classified staff. One district offered a professional growth program for which classified employees were required to submit a "declaration of intent" to participate. Classified bargaining unit members can participate in the program, which includes improving standards, on-the-job performance, improving technological advancements, and opportunities for personal and advancement growth. One district offered an annual Classified Leadership Conference, which included speakers and classes to help employees improve their job skills.

At the time of this research, the world had just gone through the COVID 19 pandemic. The short- and long-term impacts of this pandemic are not yet known. One aspect of the pandemic was a change in delivery model of learning to both children and adults due to shelter in place orders. Platforms such as Zoom, WebEx, GoToMeeting, RingCentral, and Google Meet were used to substitute for traditional face-to-face instruction. These changes carried over into professional development to some degree as well. It is not yet known the impact nor the future viability of this service delivery model on the field of classified professional development.

Summary

Classified employees comprise approximately 32% of the public elementary and secondary work force in California (U.S. Department of Education, 2010). At the writing of this dissertation, the nation is clawing its way out of the devastating COVID 19 pandemic and California is investing local, state, and federal dollars in significant expansion of the number of classified employees to respond to student health, safety, and learning loss. Although classified employees are important to school district success, there is little literature or research about their need for training. The most important asset to any organization is their employees, and training, development, and education are crucial to employees and their success with a company (Choy et al., 2006). Keeping employees engaged, motivated, and trained is a priority for most companies and should be a priority with K-12 school districts (Kaplan, 2017). Professional development for classified personnel is needed to provide new work-related skills and develop leadership skills that prepare them to become effective supervisors and managers (Sutherland Olsen, 2016). Despite a great deal of research on professional development within California

public school districts, there is a gap in the literature related to professional development for classified employees.

Professional development opportunities motivate employees to work in new ways and promote creativity in the workplace (Kaplan, 2017). Providing a planned and systematic program of professional development, including leadership training, improves operations at all levels of the district. Professional development offers staff opportunities to develop new knowledge and skills, which results in a deeper commitment and influence on how they approach their jobs (Kaplan, 2017). Research regarding classified professional development and specifically classified managers is limited to non-existent. This gap serves to hold classified staff in place and keeps them from growing, therefore also holding back the ultimate success of schools (Guskey, 2009).

Chapter II offered a literature review related to professional development and the importance and impact of classified managers within the business services departments in California school districts. The literature review was facilitated using a synthesis matrix (Appendix A). This chapter further explored professional development, the theoretical framework, and the effects of the environment. This chapter explored the theoretical foundations of professional development. As discussed throughout this study, the focus is on the development needs of classified leaders and managers, specifically for business services staff. The researcher extensively searched and read available literature and research regarding the professional development of school district business services staff. It is important to note that classified professional development in general, as well as specific to the role of school district business services staff, has received little attention in the literature or research.

CHAPTER III: METHODOLOGY

This chapter reviews the methodology for this study. It explains the research design and procedures utilized to identify and describe professional development strategies necessary to prepare classified managers in the business services division in a California school district. This chapter begins with a reiteration of the study purpose and research questions and is followed by a detailed description of the research design used. Next, the study population and sample are described, followed by sections on instrumentation, validity, and reliability. The data collection procedures for each round of the Delphi are presented, along with the data analysis techniques used to determine the findings from each round of data collection. Finally, this chapter concludes with a discussion of study limitations.

Purpose Statement

The purpose of this Delphi study was to identify and describe professional development topics required to prepare classified managers in a California school district business services department as effective leaders, as perceived by a panel of experts. This study also sought to identify the degree of importance of each professional development topic and the best strategies to address those topics, as perceived by a panel of experts.

Research Questions

The following research questions (RQs) guided this study:

1. What do experts in providing professional development identify as the professional development topics required to prepare classified managers as effective leaders in school districts?

2. How do experts in providing professional development rate the importance of each of the professional development topics identified in RQ 1?
3. For the professional development topics identified as most important in RQ 2, what professional development strategies do experts identify as most impactful in addressing these topics?

Research Design

According to Van Manen (1990), methodology refers to the philosophical framework and fundamental assumptions of research. A Delphi research design was used for this study. This technique was developed in the 1950s by Dalkey and Helmer at the RAND Corporation (Hsu & Sandford, 2007). Theoretically, the Delphi design can be continuously iterated until consensus is achieved. Delphi studies use a systematic approach to obtain informed opinions on a particular topic (Rayens & Hahn, 2000). The Delphi design draws mainly upon the opinions of identified experts and is often used when a field is relatively new or there is little prior research in the area (Rayens & Hahn, 2000). The Delphi method solicits the opinions of experts through a series of carefully designed questionnaires interspersed with information and feedback to establish convergence of opinion (Helmer-Hirshberg, 1967). The experts in this Delphi study were asked multiple rounds of questions to help develop consensus on the research topic.

Linstone and Turoff (1975) indicated the “Delphi may be characterized as a method for structuring a group communication process, so that the process is effective in allowing a group of individuals, as a whole, to deal with complex problems” (p. 3). Cyphert and Gant (1971), Brooks (1979), Ludwig (1994, 1997), and Custer, Scarcella, and Stewart (1999) pointed out three iterations, or rounds of data collection, are often

sufficient to obtain the needed information to reach a consensus. Day and Bobeva (2005) suggested the Delphi model has three stages: exploration, distillation, and utilization. In the exploration stage, the researcher establishes a selection criterion for the panel, designs the data collection, and pilots a field study. In the second stage, surveys are administered and data collection continues until reaching consensus. The third stage includes analysis of the Delphi results and a final report about the experience (Day & Bobeva, 2005). The Delphi technique is used to find group consensus among experts and avoid the challenges of face-to-face focus groups (Hallowell, 2009; Hsu & Sanford, 2007; Rowe & Wright, 1999; Sommerville, 2008; Yousuf, 2007). In this study, the Delphi design assisted the researcher to glean information about the professional development needs of district classified managers from the experts who provide these services to staff.

A Delphi study was most appropriate because it allowed for the gathering of information and reaching consensus among subject matter experts. Linstone and Turoff (2002) noted three survey rounds were appropriate based on the literature. The initial round identified the professional development topics for preparing classified managers. The second round included a rating of importance of the professional development topics identified in the first round and related strategies. The third and final round confirmed the importance of the ratings and identified the most impactful strategies for addressing each topic. Strategies were identified only for those topics identified as important based on a rating of 4.0 or above on a 5-point scale.

According to Delbecq, Van De Ven, and Gustafson (1975), the Delphi technique can determine the following objectives:

- Develop or determine a range of program alternatives
- Explore or expose assumptions leading to several judgements
- Generate consensus of the respondent group
- Correlate judgements on topics range of disciplines

Population

McMillan and Schumacher (2010) defined a population as the entire “group of elements or cases, whether individuals, objects, or events, that conform to specific criteria and to which we intend to generalize the results of the research.” (p. 129). Creswell (2012) stated the population is a group selected for a research study and is distinguished by characteristics and criteria specified by the researcher.

In the 2020-21 school year, 1,029 school districts were operating in California (CDE, n.d.). California school districts are defined as unified, elementary, high school, or other. In the 2020-21 school year, 344 unified school districts were operating in the state. In the absence of available data, it may be speculated that each unified school district has 3 to 5 classified managers serving in business services divisions. Using this figure, the range of classified managers in California unified school districts is 1,032 to 1,720. This range speaks to the potential of this research and the impact it will have on informing the leadership development of these managers and therefore the impact on school district operations in California. With a population of this size, it was not feasible to include all classified managers in this study.

Sampling Frame

The intent of this study was to identify the professional development needs of current California public school district classified managers from the perspective of those

with expertise in providing professional development to these managers. The Delphi technique relies on a group of experts, with *experts* defined as any individual with knowledge relevant to the topic (Jorm, 2015). Experts need to have extensive knowledge of and experience with the subject of interest, in this case professional development of classified managers in California.

According to Statology (2020), a sampling frame is a list of items from which a sample is obtained. The sampling frame is specific to the population under study. The researcher chose a sample of California school district in San Bernardino County based on her living in this county. The sampling frame for this study included people with:

- Experience in providing professional development for classified business managers
- Three or more year of experience
- Membership in the Association of California School Administrators (ACSA), California Association of School Business Officials (CASBO), Fiscal Crisis Management and Assistance Team (FCMAT), California School Employees Association (CSEA), California School Boards Association (CSBA), or American Association of School Administrators (AASA)
- Experience with researching, writing, and presenting on the topic of professional development for classified business managers.

The various professional organizations are premiere educational entities known for their work in the field of K-12 education as well as their work to provide professional development to the field. The field of classified management professional development is broad, dispersed, and episodic in nature.

Sample

It was not feasible to include all experts who provide professional development in a Delphi study. As such, a sample was needed. McMillan and Schumacher (2010) described the sample as a group of participants from whom data are collected. According to Ludwig (1997), many Delphi studies included 10 to 15 participants.

Criterion-based sampling was used to identify the sample for this study. Criterion-based sampling is a technique used to draw a sample that meets specific criteria for study inclusion. For this study, participants needed to be experts in the field of professional development of classified managers in business services, specifically in California. To be included in this study, the experts needed to meet at least one of the following criteria:

- Exemplary classified manager in a California public school district with at least three years of experience and the referral of their Chief Business Official (CBO)
- Exemplary provider of professional development to California public school district classified business managers for at least three years and recommended by at least two CBOs
- Representative with expertise in classified management professional development from a variety of entities deemed premiere education organizations offering classified professional development for classified business managers, e.g., AASA, ACSA, CASBO, CSEA, CSBA
- Published researcher/writer/author/presenter on the topic of professional development for classified business managers

Sample Selection

To ensure the requirements of University of Massachusetts Global IRB were met and to provide the panelists with ethical safeguards, the following conditions were established related to anonymity: participants were not aware of the identities of the other panelists and responses from the panelists were not labeled with a credit to a specific person. The researcher contacted district superintendents and county-level educational leaders seeking assistance to identify the panelists meeting the study criteria. Additionally, the researcher distributed emails and followed up by telephone as necessary to ensure receipt of the email invitation to participate in the study (Appendix B). The researcher directly contacted ACSA, AASA, CASBO, CSEA, Community Colleges, and FCMAT to identify panelists utilizing the same invitation to participate (Appendix B). Participation on the panel was limited to only those that met the criteria. The researcher stopped recruitment and moved to the study phase when 22 experts were confirmed.

The Round 1 email was sent (Appendix H) upon receiving IRB approval from the University of Massachusetts Global. It outlined confidentiality procedures and included the Research Participant's Bill of Rights (Appendix C) and informed consent form (Appendix D). Panelists were also given the electronic link to access the Round 1 survey. Round 1 began with acknowledgement of the informed consent and Participant Bill of Rights for the participant to proceed. Then participants were led to a site introducing the process with instructions on how to complete the survey and a deadline for survey completion. A similar process was used for Rounds 2 and 3, although informed consent and Participant Bill of Rights only occurred in the first survey.

Instrumentation

A series of three rounds of surveys were administered to the participants through Survey Monkey, an online surveying tool. The following sections describe the type of data collected for each round of the Delphi.

Round 1

In Round 1, the Delphi process began with an open-ended questionnaire utilizing the Survey Monkey platform (Appendix E). This served to request broad information from the panel of experts. The question in this round was open-ended and asked about the professional development topics the expert perceived as important for growing classified managers within the business services departments at California public school districts.

Round 2

After the first round of data collection, participant responses were reviewed and condensed as appropriate to mitigate duplication. The researcher consulted with an external professional researcher to ensure the condensed topics did not lose any specificity and addressed the perceptions of the experts. Once this process was completed, the topics that emerged from Round 1 were used to develop the survey items for Round 2 (Appendix F). In the second round, the questionnaire asked participants to use a Likert scale to rate the importance of each professional development topic. The survey used a five-point Likert scale ranging from 1 = *Not Important* to 5 = *Extremely Important*. Additionally, the survey asked experts to list strategies used to deliver the professional development topics identified.

Round 3

The ratings from Round 2 were analyzed and those items meeting the threshold of a mean score of at least 4.0, which illustrated agreement as very or extremely important, were then used to develop the Round 3 survey (Appendix G). In this round, each Delphi panelist received a questionnaire based on the topics meeting the 4.0 criteria. The survey included the mean ratings from Round 2 with an ability to re-rate each item as well as an additional opportunity to provide the most impactful strategies for these topics. In this format, the round allowed the panelists to confirm the topic's importance and identify three impactful strategies to address this topic.

Validity and Reliability

Adherence to the Delphi process inherently creates validity and reliability by using anonymous input from experts in multiple rounds with the ability to create consensus (Li, Ehiri, & Hu, 2014). A particular stage that affects validity and reliability is the ability for experts to be presented back the data from the group and choose to re-rate items upon reflection or rate items they did not think of in the prior round.

Field test. The reliability and validity of a survey instrument can be increased prior to the first round of questioning through field-testing the communications, instructions, and surveys in a same manner to be employed with the expert panel. The researcher field-tested each of the three survey rounds with two individuals who met the study criteria but were not included in the study. Literature suggests a Delphi process requires piloting instruments to ensure validity and reliability (Cox & Cox, 2008; Linstone & Turoff, 2002). The pilot study was used to ensure the surveys were readable, understandable, effective, and provided the necessary data.

Synthesis matrix. Another way to increase the validity of a qualitative research design is by identifying agreement about the topic of study among multiple researchers (McMillan & Schumacher, 2010). Thus, the validity of the study was supported by a literature matrix (Appendix A) with information from multiple sources that was constructed during the literature review.

Intercoder reliability. To further ensure reliability, the research utilized an independent researcher to review the qualitative data generated in each survey round. The list of topics generated in Round 1 by nature had overlap, commonalities, and duplication. The researcher utilized an independent researcher to confirm the work to combine and condense the topics with integrity. This practice ensured the study meaning and validity remained intact.

Data Collection

Upon approval from University of Massachusetts Global's IRB, the researcher conducted the study with a panel of 22 experts representing district classified business managers, professional development organizations, and others as outlined in the sample criteria. In Round 1, each Delphi participant provided their expert input regarding professional development topics. In Round 2, each Delphi participant reviewed and rated the information provided in Round 1 and provided strategies for training on the topic. In Round 3, the Delphi participants confirmed the importance of the topics and strategies.

Data Analysis

Merriam (2009) stated data analysis in qualitative research is the process of making sense of the data. The process of data analysis in this research began with the collection of Round 1 data, with the process repeated for Rounds 2 and 3.

Qualitative Data Analysis

The Round 1 survey generated the initial data, which was qualitative in nature. In this first survey, participants generated topics of professional development required to prepare classified managers as effective leaders. Participants could provide as many topics as they felt appropriate in an open text box. The data were reviewed for duplication and used to create a list of proposed topics from the experts. Condensing of topics to avoid duplication was completed by both the researcher and an independent researcher to provide greater validity and meaning.

In Round 2, participants completed two steps. The first was rating the topics on a five-point Likert scale regarding importance of each topic and the second was identifying strategies to use for training on each professional development topic. In Round 3, participants confirmed their importance ratings, chose the top three training strategies per topic, and provided any strategies they thought might have been missed.

The data for each round were utilized to develop the next set of survey items. The Round 1 survey generated initial qualitative data about professional development topics needed to prepare classified managers as effective leaders. In Round 2, the condensed Round 1 topics were sent to the expert panel for rating utilizing a 5-point Likert scale measuring importance. This assisted the researcher in identifying the degree of importance of topics for preparing classified managers to become effective leaders. In Round 2, additional qualitative data were gathered regarding the strategies utilized for each professional development topic. The Round 2 responses were used to calculate mean importance scores for each item generated from Round 1.

The list of professional development strategies rated in Round 2 were analyzed. The researcher calculated the mean importance scores for each professional development topic and those receiving a mean of 4.0 or higher were provided to the experts in Round 3, which allowed the panelists to see where their responses ranked within the distribution of ratings and served as feedback, giving them context as they reviewed their decisions and considered possible revisions to their ratings. Additionally, Round 3 allowed panelists to rerate the top three strategies for delivering training.

Limitations

Limitations exist in all research studies. The Delphi technique is a valuable design in obtaining expert opinion on issues and topics. The consensus gained from using the Delphi technique provides expert opinion to identify and prioritize issues (Hsu & Sanford, 2007; Rayens & Hahn, 2000; Skumolski, & Harman, 2007; Yousuf, 2007). However, the Delphi technique characteristics can affect the results of the study, resulting in limitations. For example, conclusions are limited by the panel members, the selection of panelist can alter the outcome, and participant opinion of the quality of the responses may affect the outcome. The quality of results can limit the outcome because of the survey instruments used and the outcome can also change if questions are poorly worded (Hallowell, 2009; Hsu & Sanford, 2007; Rayens & Hahn, 2000; Skumolski et al., 2007; Yousuf, 2007). These limitations were considered and mitigated through careful selection of the panelists and working with research experts in the wording of questions.

Summary

The chapter included the purpose statement, research questions, and research design. The chapter also provided a description of the methodology, population and

sample, instruments, validity and reliability, data collection, data analysis, and limitations. Chapter III provided a description of the rationale for utilizing the Delphi method and analysis process. Chapter IV presents the findings from the study.

CHAPTER IV: RESEARCH, DATA COLLECTION AND FINDINGS

Chapter IV presents the analysis of the data collected from this Delphi study used to identify the ongoing professional development needs of classified personnel in California public school districts, which is critical to their growth, retention, and future. In today's modern age, educational institutions rely heavily on the expertise of classified school employees to keep campuses safe, organized, clean, and running efficiently (CSEA, 2018). Classified employees are the backbone of the public school system and to retain this valuable resource, it is critical to provide them opportunities for continued personal and professional development. Chapter IV provides a detailed presentation of the data obtained from the survey rounds aligned with the study's research questions.

Chapter IV presents the study's data, which were obtained from 22 panel experts who participated in three rounds of data collection. The Delphi technique was used to garner expert opinions on the topics. The consensus of using the Delphi technique can help identify and prioritize issues (Hsu & Sanford, 2007; Rayens & Hahn, 2000; Skumolski, & Harman, 2007; Yousuf, 2007).

This Delphi study engaged the expert panel in three rounds of surveys. Each round took 10-15 minutes. The total time for all three rounds was 30-45 minutes. Participation in the electronic surveys was voluntary. Each expert, identified as such using specified criteria, was provided the opportunity to decline participation at any time. This chapter is divided into seven sections: purpose statement, research questions, data collection procedures, population, sample, presentation of the data, and summary.

Purpose Statement

The purpose of this Delphi study was to identify and describe professional development topics required to prepare classified managers in a California school district business services department as effective leaders, as perceived by a panel of experts. This study also sought to identify the degree of importance of each professional development topic and the best strategies to address those topics, as perceived by a panel of experts.

Research Questions

The following research questions (RQs) guided this study:

1. What do experts in providing professional development identify as the professional development topics required to prepare classified managers as effective leaders in school districts?
2. How do experts in providing professional development rate the importance of each of the professional development topics identified in RQ 1?
3. For the professional development topics identified as most important in RQ 2, what professional development strategies do experts identify as most impactful in addressing these topics?

Research Methods and Data Collection

This study utilized three electronic questionnaires administered through SurveyMonkey. In Round 1, Delphi participants provided their expert view of professional development topics they believed were required to prepare classified managers as effective leaders in California public school districts. In Round 2, Delphi participants were presented the summarized topics generated in Round 1 and asked to rate their importance utilizing a 5-point Likert scale. Additionally, in Round 2 the experts

were asked to identify strategies for the delivery of the topic and were offered the opportunity to provide new professional development topics they felt should be included. In Round 3, only those professional development topics from Round 2 that received an average importance rating of at least 4 on the 5-point scale were presented, resulting in the final set of topics. Table 1 presents the original allocated times and actual times for each round of the study.

Table 1

Allocated Completion Time Versus Actual Completion Time

Round	Allocated Time	Actual Time
1	January 30-February 6 (7 days)	January 30 - February 6 (7days)
2	February 15–February 21 (7 days)	February 15–February 28 (14 days)
3	March 7-March 13 (7 days)	March 7-March 20 (14 days)

Population and Sample

In the 2020-21 school year, there were 1,029 school districts operating in California, with 344 being unified school districts (CDE, n.d.). In the absence of available data, it was speculated that each California unified school district had 3-5 classified managers serving in business services divisions. Using this figure, the range of classified managers in unified school districts was 1,032 to 1,720.

The sample for this research, or expert panel members, comprised of 22 experts in the provision of professional development for classified managers within the business services departments in California districts.

Demographic Data

In terms of race, 17 members self-identified as White/Caucasian, one identified as Asian, one identified as African American or Black, and three identified as Hispanic or

Latinx. Nearly half of the participants (45%) indicated their age range to be 55-64, with 27% between 45-54, 18% between 65-74, and 9% younger than 44 years. Similar proportions of males (45%) and females (55%) were represented on the panel. Lastly, 45% possessed bachelor's degrees, 27% master's degrees, and 23% doctorates. Table 2 provides a summary of their demographic characteristics.

Table 2

Participant Demographic Characteristics

	<i>n</i>	%
Race/Ethnicity		
White/Caucasian	17	77
Asian American or Asian	1	5
Hispanic or Latinx	3	14
African American or Black	1	5
Age Range		
35-44	2	9
45-54	6	27
55-64	10	45
65-74	4	18
Gender		
Male	10	45%
Female	12	55%
Education Level		
Bachelor's degree (BA, BS)	10	45%
Master's degree (MA, MS, MEd)	6	27%
Doctoral degree (PhD, EdD)	5	23%

The researcher contacted district and county superintendents and premiere state educational organizations to identify and recruit participants who met the study criteria. Participants often met more than one of the stated criteria. The criteria for expert panelists included exemplary classified managers, exemplary providers of professional development, representatives of premiere educational organizations, and having published or presented on the topic of classified professional development. Ten expert

participants met the criteria for more than one category of criteria. Table 3 depicts the criteria met by each panel member.

Table 3

Expert Panel Criteria Met by Participants

Participant	Exemplary Classified Business Managers	Exemplary Provider of Professional Development for Classified Managers	Representative of premiere organizations Providing PD for Classified Managers	Presented and/or Published on the topic of Classified Professional Development
1			X	
2			X	
3	X			
4	X			
5	X	X		X
6	X			
7		X	X	X
8			X	X
9	X	X		X
10	X			
11		X		
12		X	X	
13		X	X	X
14		X	X	X
15	X	X		
16		X	X	X
17		X	X	X
18			X	
19		X		X
20	X			
21	X			
22	X			

Presentation and Analysis of the Data

Findings for Round 1

In Round 1, the Delphi process began with an open-ended questionnaire sent via SurveyMonkey (Appendix E). This round served to request broad information from the expert panel. Although all 22 expert panelists responded, 21 provided the five requested topics and seven experts provided additional topics beyond the five. One respondent inadvertently selected the ‘I do not choose to participate’ option and was therefore unable to provide responses. In subsequent rounds, this individual went on to provide input.

Round 1 generated 112 responses from the 22 experts. Responses were analyzed and grouped by like terms and phrases, which populated the Round 2 questionnaire.

Responses were classified into 12 professional development topics:

- Succession planning
- Management: hiring, building capacity, retention, team building, delegation, evaluation
- Leadership: Lead, manage, motivate, use emotional intelligence, create trust, model
- Ethical principles including risk management and fraud prevention
- Budgeting basics: creating, monitoring, updating annual and multi-year projections
- School finance/funding from larger context down to LCFF/LCAP
- Conflict resolution
- Human resources: employment law, legal provisions, and CBA language including discipline
- Technical skills: accounting, auditing principles, purchasing, food services, SPED
- Law and politics: legislation, advocacy, case law, political perspectives
- Communication: listening, speaking, writing, presenting, translating complexity
- Working with people across teams, departments, and entities

Findings for Round 2

The 12 topics that emerged from Round 1 were used to develop the survey items for Round 2 (Appendix F). In the second round, the questionnaire asked participants to

use a Likert scale to rate each professional development topic for importance using a five-point Likert scale: 1 = *Not Important*, 2 = *Somewhat Important*, 3 = *Important*, 4 = *Very Important*, 5 = *Extremely Important*. Additionally, the survey asked experts to list strategies used to deliver the professional development topics identified. Experts provided 209 responses related to strategies for delivery. Lastly, experts were given the opportunity to add additional professional development topics. Two experts responded with one affirming “No other topics came to mind” and a second suggesting the topic of “Curriculum and instructional improvement basics, basics of student academic performance measurement/assessment.” This professional development topic was added to Round 3 for experts to rate its importance and to list delivery strategies.

Table 4 identifies the importance ratings of each of the 12 topics, including the weighted mean and percentage of staff who marked the three highest categories.

Table 4

Importance Ratings of Professional Development Topics

Topic	Weighted Average	Important	Very Important	Extremely Important
Leadership: Lead, manage, motivate, use emotional intelligence, create trust, model	4.55	4.6	36.4	59.1
School finance/funding from larger context down to LCFF/LCAP	4.41	18.2	22.7	50.1
Communication: listening, speaking, writing, presenting, translating complexity	4.27	13.6	45.5	40.9
Budgeting basics: creating, monitoring, updating annual and multi-year projections	4.23	18.2	27.3	50.0
Working with people across teams, departments, and entities	4.18	27.3	27.3	45.5
Technical skills: accounting, auditing principles, purchasing, food services, SPED	4.05	27.3	40.9	31.8

Management: hiring, building capacity, retention, team building, delegation, evaluation	4.05	27.3	40.9	31.8
Ethical principles including risk management and fraud prevention	3.77	18.2	54.6	18.2
Human resources: employment law, legal provisions, and CBA language including discipline	3.64	31.8	31.8	22.7
Conflict resolution	3.55	50.0	31.8	13.6
Succession planning	3.14	27.3	22.7	13.6
Law and politics: legislation, advocacy, case law, political perspectives	2.82	40.9	18.2	4.6

Findings for Round 3

The ratings from Round 2 were analyzed and those items meeting the threshold of a mean score of at least 4.0, which illustrated agreement as to *very or extremely important*, were then used to develop the survey for Round 3 (Appendix G). In Round 3, each Delphi panelist received a questionnaire listing the seven topics meeting the 4.0 criteria from Round 2 as well as the newly generated topic of “How California gauges/measures students, school and school district achievement.” The survey included the mean ratings from Round 2 for the seven generated topics with an ability for the experts to re-rate each item. For the newly generated topic from Round 2, the experts rated its importance for the first time in Round 3. The researcher analyzed and summarized the 17 to 20 strategies provided for each topic in Round 2 and provided the summarized list to the experts with an opportunity to identify the three most impactful strategies for these topics. Numerous references emerged from a handful of experts concerning the effectiveness of on-demand and online formats, yet those concerns were not voiced by most of the experts. Round 3 allowed the panelists to confirm the topic’s importance and identify the three most impactful strategies to address this topic.

Table 5 presents the data from Round 3. It includes the seven professional development topics that met the 4.0 or greater importance rating from Round 2, as well as the re-rating as identified in Round 3. In Round 3, four of the topics had a mean rating above 4.0 whereas the others fell below the 4.0 threshold. The newly generated topic from Round 2 did not meet the 4.0 threshold in its singular rating in Round 3.

Table 5

Professional Development Topics

Topic	Round 2 Mean	Round 3 Mean
Leadership: Lead, manage, motivate, use emotional intelligence, create trust, model	4.55	4.50
Communication: listening, speaking, writing, presenting, translating complexity	4.27	4.45
School finance/funding from larger context down to LCFF/LCAP	4.41	4.32
Working with people across teams, departments, and entities	4.18	4.23
Management: hiring, building capacity, retention, team building, delegation, evaluation	4.05	3.95
Technical skills: accounting, auditing principles, purchasing, food services, SPED	4.05	3.82
Budgeting basics: creating, monitoring, updating annual and multi-year projections	4.23	3.82

In Round 2, the experts were asked to generate strategies for delivering each professional development topic. The researcher then took those combined results per topic and merged similar words and language to arrive at 6-7 strategies per topic. In Round 3, the panel was asked to select the three most impactful strategies for each topic.

Delivery Strategies for the Most Important Topics

Although there were seven professional development topics rated greater than 4.0 in importance in Round 2, as well as the expert generated topic with no Round 2 rating, only four of these generated an importance score of 4.0 or greater in Round 3. Thus, four

professional development topics were identified as most important by the experts. This section presented the professional development delivery strategies identified as most impactful for the topics.

Leadership: Lead, manage, motivate, use emotional Intelligence, create trust, model. For this topic, seven strategies were generated from Round 2: (1) coaching and mentoring, (2) ongoing professional development that is incremental and includes personal growth tools, (3) small group cohorts, (4) online or in-person workshops, (5) modeling and demonstration with job shadowing, (6) readings on leadership, and (7) college or professional organization coursework and/or certifications. All 22 respondents chose coaching and mentoring as one of their three most impactful strategies. Table 6 illustrates the top three delivery strategies, each chosen by more than half the experts.

Table 6

Most Impactful Strategies for Leadership Topic

Strategy	n	%
Coaching and mentoring	22	100
Modeling and demonstration; job shadowing	13	59.1
PD that is ongoing, incremental, and includes personal growth tools	12	54.6

Experts were given an open dialogue box to respond to any comments or clarifications regarding the topic of leadership. Responses included:

- Fun way to mentor and grow together is with book clubs with leadership or mentoring topics.
- I have little first-hand experience with tools such as Strengths Finder, DISC, etc., so can't comment on those. I think 360 reviews can be helpful, but few

are good at implementing them and they can be counterproductive if poorly implemented.

- I think that this depends in part on the person. For myself, I do as much reading as I can on leadership topics but for others that might not be their best mode of learning.
- This is highly dependent on the learning style of the individual and also the area they manage.
- Coaching, while not all that common in classified preparation, should be an essential strategy. Small groups, facilitated by a skilled coach significantly builds capacity. Modeling....very powerful!
- These strategies and choices are improved when taught and monitored externally.

Communication: listening, speaking, writing, presenting, translating

complexity. For this topic, six delivery strategies were generated from Round 2: (1) modeling, demonstration, and job shadowing; (2) group classes/coursework delivered by colleges, Toast Masters or similar organizations; (3) facilitated practice with feedback and reflection in a variety of settings, including one-the-job; (4) coaching and mentoring, (5) in-person or online workshops, and (6) one-the-job training through department, district, and county-led meetings. The highest rated delivery strategy for this topic was facilitated practice and the second highest was coaching and mentoring. Table 7 provides the top three rated delivery strategies for this topic, defined as exceeding 50% agreement among the experts.

Table 7

Most Impactful Strategies for the Communication Topic

Strategy	n	%
Facilitated practice with feedback and reflection in a variety of settings, including on-the-job	17	77.3
Coaching and mentoring	16	72.7
Group classes/coursework delivered by colleges, Toast Masters, and similar organizations	15	68.2

Experts were given an open dialogue box to respond to any comments or clarifications regarding the topic of communication. Responses included:

- Present/speak any chance you get. Groups of 5 or 500. Practice and get feedback from your mentor on your presentations.
- These skills are very difficult to teach to adult-aged individuals. If not learned prior to college and then deeply reinforced through college or after high school, it's hard to teach. These skills stem from years of reading and writing starting from an early age, plus focused instruction from high-quality K-12 schools and colleges. Few gain these skills elsewhere or late in life. The strategies listed above can help to polish and refine the skills, but rarely to teach them. This is a major impediment to the careers of many CBOs.
- Time and opportunities to learn through practice is essential for any strategy to be effective.
- Highly dependent on the individual. Some of the strategy choices above overlap making the selection difficult to make and soft.
- Of these choices, facilitated practice is far and away the most effective. The more you practice these skills, the more facile you become.

- All of the above strategies or choices can work. I believe the three selected are most successful.
- Not sure if there are a lot of options out there for communication strategies.

School finance/funding from larger context down to LCFF/LCAP. For this topic, six delivery strategies were generated from Round 2: (1) in-person and online workshops and webinars; (2) reference materials such as email listservs, newsletters, and training manuals, (3) on the job training and or hands-on exercises with real world simulations, (4) mentors and job shadowing, (5) job-a-like training and networking, and (6) engagement with school business professional learning organizations. The highest rated delivery strategy agreed upon by 20 experts was in-person or online workshops and webinars. Following behind that three strategies were all agreed upon by 14 experts. Table 12 lists the four delivery strategies that exceeded the 50% threshold of expert agreement.

Table 8

Most Impactful Strategies for the Finance/Funding Topic

Strategy	n	%
In-person or online workshops and webinars	20	90.9
Reference materials (email, newsletters, training manuals, podcasts)	12	54.6
On-the-job training or hands-on exercises with real world simulations	12	54.6
Engagement with school business professional learning community	12	54.6

Experts were given an open dialogue box to respond to any comments or clarifications regarding the topic of communication. Responses included:

- Understanding the history and history repeating itself over and over.
- Good fiscal management makes for a strong district.
- One must obtain and possess the technical experience to understand the work and lead the technical staff. Workshops and webinars are important but are often high-level and less technical.
- The key strategy is to engage all platforms in the forefront of policies in place and how they affect an LEA. These platforms have key information such as SELPA, interest rates, assembly or trailer bills in play.
- These concepts are relatively straightforward to teach/learn and workshops/webinars, reference materials, plus hands-on application of the concepts usually works very well.
- Face to face instruction is always better and more efficient in my view. Knowledge transfer in person far exceeds anything that is done online. As well, coaching is superior in concept and practice than simple mentoring. Without sufficient application/practice, most *training* is pretty useless.
- These strategies can be self-taught.

Working with people across teams, departments, and entities. For this topic, seven delivery strategies were generated from Round 2: (1) coaching, mentoring, and job shadowing; (2) in-person workshops and trainings; (3) online workshops and trainings; (4) on the job training; (5) college coursework; (6) job-alike training; and (7) structures that model and support collaboration and relationships building. The highest rated delivery strategy for this professional development topic was structures that model and support collaboration and relationship building, which was agreed upon by 20 of 22

experts (90.9%). Table 9 presents the three delivery strategies that were selected by at least 50% of respondents.

Table 9

Most Impactful Strategies for the Working with People Topic

Strategy	n	%
Structures that model and support collaboration and relationship building	20	90.9
Coaching, mentoring, and job shadowing	15	68.2
In-person workshops and trainings	13	59.1

Experts were given an open dialogue box to respond to any comments or clarifications regarding the topic of communication. Responses included:

- It's important to work within an organization that genuinely values cross-department/team collaboration. It's nearly impossible to learn without it and many schools/districts don't model such behavior.
- Time with colleagues to develop relationships and trust is critical.
- Dependent on the learning style of the individual. I have worked with managers that cannot relate to classroom learning but rather need on-the-job and job-a-like training.
- This is a leadership issue and very hard to teach. Most classified administrators are simply too vested in being 'the boss'.
- Understanding and self-awareness are key to these strategies.

Finally, Round 3 included a final open-ended question regarding any final comments or closing thoughts. Seven responses were provided with four of them affirmations or thanking the researcher for conducting the study. One expert was

concerned re-rating in Round 3 might have been biased by providing the mean from Round 3. One expert shared an observation from the experience:

Much of my lens comes from current state of things as I've experienced.

Technical skills can be learned but soft skills are much harder to acquire or change and can make or break teams and organizations. Many classified managers are promoted based on technical expertise which is important, but they're not taught and/or promoted based on leadership skills.

The final expert suggested, "Managers within the business services can have many different specialties - accounting, budgeting, purchasing, payroll, risk management, HR, operations, IT, legal, facilities, etc. Understanding their specific role and adapting learning opportunities is important."

Summary

The purpose of this Delphi study was to identify and describe professional development topics required to prepare classified managers within business services departments in California school districts as effective leaders, as perceived by a panel of experts. This study also sought to identify the degree of importance of each professional development topic and the most impactful strategies to address the topics identified. A panel of 22 experts with expertise in providing professional development for classified business managers was drawn from: (1) school district classified business managers with three or more years of experience; (2) representatives who provide classified professional development affiliated with the Association of California School Administrators (ACSA), California Association of School Business Officials (CASBO), Fiscal Crisis Management and Assistance Team (FCMAT), or California School Bords Association (CSBA); and

(3) researchers, authors, and presenters on the topic of professional development for classified business managers.

The Delphi process consisted of three rounds. Round 1 was to generate professional development topics using the question, “Based on your experience and expertise in providing professional development, please identify the professional development topics you believe are required to prepare classified managers as effective leaders in California public school districts?” The panel was asked to respond with a brief description of up to five topics. Responses were analyzed and presented in Round 2 during which the panel was asked to rate the importance of each professional development topics using a 5-point Likert scale in which 1 = *Not Important*, 2 = *Somewhat Important*, 3 = *Important*, 4 = *Very Important*, and 5 = *Extremely Important*. Also in Round 2, experts were provided with the opportunity to suggest any additional topics, from which one was generated and moved on to Round 3.

In Round 3, only those professional development topics from Round 2 with an average importance rating of at least 4 out of 5 and the newly generated topic were presented. Panelists were asked to re-rate the importance of each topic and offer the three most impactful strategies for delivering professional development on each topic.

In summarizing the data, the experts rated seven professional development topics with an importance value of 4.0 or greater. When asked to re-rate, four of the seven continued to meet the 4.0 threshold. To arrive at key findings, the researcher chose to present the four professional development topics that retained an importance factor of 4.0 or greater in Round 3. The four topics and the most impactful strategies (defined as those identified by at least 50% of panelists) were presented as the final list.

Chapter IV presented in narrative and table form the data collected from the 22 experts. Chapter V summarizes the study findings, both major and unexpected. It also provides conclusions and implications for future actions, as well as recommendations for future study. Finally, Chapter V concludes with reflections and closing remarks.

CHAPTER V: CONCLUSIONS, AND RECOMMENDATIONS

This chapter provides a review of the key elements of this research study. The review includes the study's purpose, research questions, methodology, population, and sample. Chapter V then provides the study's major findings, conclusions, implications for action, and recommendations for future research. The chapter concludes with remarks and final reflections.

Purpose Statement

The purpose of this Delphi study was to identify and describe professional development topics required to prepare classified managers in a California school district business services department as effective leaders, as perceived by a panel of experts. This study also sought to identify the degree of importance of each professional development topic and the best strategies to address those topics, as perceived by a panel of experts.

Research Questions

The following research questions (RQs) guided this study:

1. What do experts in providing professional development identify as the professional development topics required to prepare classified managers as effective leaders in school districts?
2. How do experts in providing professional development rate the importance of each of the professional development topics identified in RQ 1?
3. For the professional development topics identified as most important in RQ 2, what professional development strategies do experts identify as most impactful in addressing these topics?

Population and Sample

In the 2020-21 school year, there were 1,029 school districts operating in California, of which 344 were classified as unified school districts (CDE, n.d.). In the absence of available data, it was speculated that each California unified school district had 3-5 classified managers serving in business services divisions. Using this figure, the range of classified managers in unified school districts was 1,032 to 1,720. This range speaks to the potential of this research and the impact it could have on informing the leadership development of these managers and therefore the impact on school district operations and ultimately students.

The sample for this research comprised of 22 experts in the provision of professional development for classified managers within the business services departments in California districts.

Methodology

The Delphi study was completed using three survey rounds. Experts were sent an email with instructions and the survey link for each round. Round 1 asked the expert panel to identify professional development topics required to prepare classified managers as effective leaders in school districts. Round 2 asked the panel to review the combined Round 1 data and use a 5-point Likert scale to rate their belief regarding the importance of the professional development topics and offer strategies for delivering professional development on the topic. Finally, in Round 3, only those professional development topics from Round 2 that received an average importance rating of at least 4 out of 5 were presented. The expert panelists were asked to re-rate the importance of each topic and

identify the three most impactful delivery strategies per topic. The data collection process took approximately three months to complete.

Major Findings

The purpose of this Delphi study was to identify and describe professional development topics required to prepare classified managers in California public school district business services departments as effective leaders, as perceived by a panel of experts. This study also sought to identify the degree of importance of each professional development topic and the best strategies to address those topics, as perceived by a panel of experts. The major findings from this study are presented as they relate to the research questions.

Key Findings for Rounds 1 and 2

Research Question 1 asked: *What do experts in providing professional development identify as the professional development topics required to prepare classified managers as effective leaders in school districts?* Research Question 2 asked: *How do experts in providing professional development rate the importance of each of the professional development topics identified in RQ 1?*

Qualitative data were collected from Round 1, which used an open-ended question to generate a list of professional development topics. Quantitative data were collected in Round 2 as panelists were asked to rate the importance of the topics generated in Round 1. Twenty-one experts completed the online survey and provided professional development topics in Round 1. The topics generated in Round 1 were combined and used in Round 2, which was completed by all 22 panel members.

Major Finding 1 - Leadership. Experts agreed the most important topic for professional development for classified managers within the business services departments at California public school districts is leadership, which included words such as lead, manage, motivate, use emotional intelligence, create trust, and model leadership. It received an average importance rating of 4.55. Fifteen experts (68%) rated this topic as extremely important, stressing the need for managers to be able to lead their staff. This level of importance aligned with the literature, which underscored that without the opportunity to learn about leadership and leadership skills, employees are often ill-prepared to be successful in a management role when promoted (Kuligowski, 2019).

Major finding 2 - Communication. Communication was the third highest rated professional development topic in Round 2 ($M = 4.27$) and rose to second highest rated topic in Round 3 ($M = 4.45$). Communication was described broadly as listening, speaking, writing, presenting, and translating complexity. One expert made clear the importance of communication, sharing,

The business manager plays an important role in ensuring that principals, teachers, board members, and members of the public understand how the budget works and when their input is needed. Effective business managers are able to build trusting relationships so that facts are understood and believed.

A second expert mentioned the need for managers to understand “the importance of tone, and that many times a personal conversation works better than an email or text, where tone is lost or misunderstood. Honing your listening skills, letting the customer be heard and acknowledged.” Literature supports the importance of communication as well.

The Center for Creative Leadership (CCL, 2023) suggested communication is a core leadership function requiring managers to speak clearly and convey messages to a broad range of stakeholders.

Major finding 3 - School finance/funding. The area of school finance and funding, which knowledge of California’s local control funding formulas, was rated second highest in importance in Round 2 ($M = 4.41$) and then moved in third highest in Round 3 ($M = 4.32$). Twenty experts perceived knowledge of school finance and funding as extremely important. One expert clarified managers must know “how K-12 school districts are funded... How these funding programs were created and their historical background. Plus, the larger context including California’s complex state budget system.” CASBO (n.d.) explained school business officials require high levels of technical knowledge to administer and lead the complex business needs of public school districts. Education business associations across many states noted the importance of financial planning knowledge and skills to support districts.

Major Finding 4 - Working with people. The professional development topic of working with people across teams, departments, and other entities was rated fourth in both Round 2 ($M = 4.18$) and remained fourth in Round 3 ($M = 4.23$). One of the experts stated working with others was “critically important for all staff” because they will engage with people in “department meetings, organization meetings, and small groups.” Another stated, “This is extremely important at all levels and includes both lateral and hierarchical organizational structures.”

Major Findings for Research Question 3

Research Question 3 was: *For the professional development topics identified as most important in Research Question 2, what professional development strategies do experts identify as most impactful in addressing these topics?*

Each professional development topic generated its own list of possible strategies in Round 2, which were then narrowed to each experts top three strategies in Round 3.

Table 10 captures strategies that were identified by at least 50% of the experts.

Table 10

Most Impactful Strategies for Delivering Professional Development

Topic	Expert Identified Strategies
Leadership	<ol style="list-style-type: none"> 1. Coaching and mentoring (100%) 2. Modeling and demonstration; job shadowing (59.1%) 3. Ongoing, incremental PD including instruments (54.6%)
Communication	<ol style="list-style-type: none"> 1. Facilitated practice with feedback and reflection (77.3%) 2. Coaching and Mentoring (72.8%) 3. Group classes/coursework delivered externally (68.2%)
School Finance	<ol style="list-style-type: none"> 1. Workshops/webinars; in person or online (91.9%) 2. Reference materials (54.6%) 3. On the job training (54.6%) 4. Engagement with school business PLC (54.6%)
Technical Skills	<ol style="list-style-type: none"> 1. Ongoing on the job training/job embedded (81.9%) 2. Workshops/trainings and classes; specific skills (81.8%) 3. Access to technical resources and materials (54.6%)
Budgeting Basics	<ol style="list-style-type: none"> 1. Workshops and trainings; in person or online (86.4%) 2. On the job training (63.6%)
Supervision and Management	<ol style="list-style-type: none"> 1. Coaching and mentoring; internal (63.6%) 2. Coaching and mentoring; external (63.6%) 3. Specific offerings by CASBO, SSC and other outside entities (54.6%)
Working with people	<ol style="list-style-type: none"> 1. System structures that model and support collaboration and relationship building (90.9%) 2. Coaching and mentoring; job shadowing (68.2%) 3. Workshops and trainings; in person (59.1%)

Major finding 5 - Job shadowing. Job shadowing and on-the-job training (OJT) was identified as a key strategy in four of the seven professional development topics that met the 4.0 minimum in Round 2. It was identified as a key strategy in three of the four professional development topic areas in Round 3.

According to Indeed.com (2019) first-hand experience is gained from a coworker or supervisor and OJT can involve hands-on work. Indeed.com also highlights the importance of job shadowing or observing an experienced employee. The purpose of OJT is to prepare the employee to develop the skills, confidence, and knowledge needed to perform the job without supervision (Indeed, 2019). One expert reiterated that, “Time and opportunities to learn through practice is essential for any strategy to be effective.”

Major finding 6 - Coaching and mentoring. Coaching and mentoring are key strategies for developing classified managers into leaders. Four of the seven Round 2 professional development topic areas included references to coaching and mentoring. It was identified as a key strategy by experts in three of the four professional development topic areas in Round 3.

In today’s working world, employees want to be coached in their positions. Gallup (2021) found only one in three managers had the opportunity to grow in their position, and noted coaching should be practical and approachable to support professional growth. Coaching includes asking employees how to better serve and support them and listening to their goals, challenges, and needs. Good coaching involves employee engagement, performance, and development (Kar & Watkinson, 2021). In Round 3, one expert stated, “Coaching, while not all that common in classified preparation, should be

an essential strategy.” A second expert suggested, “A fun way to mentor and grow together is with book clubs with leadership or mentoring topics.”

Major finding 7 - Workshops, classes, and trainings. Workshops, classes, and trainings are a delivery strategy identified by the experts in six of the seven professional development topics generated in Round 2, and three of the four topics in Round 3. Both online and in-person training opportunities were cited by the experts as effective strategies to develop classified managers as leaders. One expert expressed a concern that delivery was “dependent on the learning style of the individual. I have worked with managers that cannot relate to classroom learning but rather need on-the-job and job-a-like training.” Another stated “This [technical skill] is one area where workshops, done well, can be most effective.” A third expert suggested, “Instruction must be incremental, ongoing, and build on prior learning.” Professional development for classified staff has the potential to provide knowledge, competency, confidence, and career advancement. Professional development, also referred to as ongoing learning, is available to many employees, but historically offered as a one-day in-service or workshop (Desimone, Porter, Garet, Yoon, & Birman, 2002; Yoon, Duncan, Lee, Scareloss, & Shapley, 2007).

Unexpected Findings

Four unexpected findings emerged regarding the professional development topics necessary for preparing classified managers and the best strategies for delivery.

Unexpected Finding 1

Seven professional development topics met the criteria for inclusion in Round 3. The researcher found it unexpected that the topic of ethical principles, risk management, and fraud prevention did not meet the criteria to move on to Round 3. The topic has a

significant impact for public school districts and it was unexpected that the experts did not rate this topic of higher importance. Financial loss and impropriety can embroil districts in legal and political minefields. As stewards of limited public dollars, school districts, school boards, and superintendents have a responsibility and face significant public backlash for falling short in this arena.

Unexpected Finding 2

The second unexpected finding was that the highest rated professional development topic related to leadership. This topic had a mean score of 4.55 and over 59% of experts cited it as extremely important. Often in the field of finance and business services, technical skills override soft skills. The finding that leadership was the highest rated and technical skills did not make the top four professional development topics was unexpected.

Unexpected Finding 3

In Round 2, experts were asked for additional topics they felt were important but not previously captured. One topic was brought forward, how California measures student, school, and school district achievement. The researcher found it unexpected that this topic, which is vital to the work of schools, only received a mean score of importance of 3.0 in Round 3. This was in contrast so the *2018 Getting Down to Facts II* report by Stanford University and the Policy Analysis for California Education, which highlighted,

A notable shift in the role of the CBO in the district — a role that is aligned with the state’s intent for the LCFF to promote data-informed decision-making and to ensure that investments with the greatest potential

benefits for students are directed to the students with the greatest needs.

(p. 17)

Experts had a wide range of comments on this topic. One expert suggested “I wouldn’t say this is a key responsibility for classified staff...I can’t see where fiscal staff really need to know how we measure student performance.” Another suggested the state lacks knowledge of how to measure student performance. The remaining 20 experts all suggested ways to learn and acquire this knowledge but did not posit its worth.

Unexpected Finding 4

Although experts identified online learning and workshops as a strategy within some of the professional development topics, the researcher was surprised this method was not more prevalent and rated higher. According to OECD (2020), during and after the COVID-19 crisis organizations, including school districts, saw a substantial increase in online learning among adults. The researcher was surprised the extensive use of online delivery during the pandemic was not seen as optimal in all areas by the experts. In fact, one expert unequivocally stated, “From my perspective, face-to-face is always best.”

Conclusions

As the world is transforming, there is a need to develop leaders and leadership at all levels of organizations. The COVID 19 pandemic caused an increase in retirements, relocations, and more general departures from the field of education (ISMINC, n.d.). More than ever in a world were attracting and retaining talent has become a challenge, the business department within school districts need a skilled workforce, which consists of the education, development, and training provide to individuals. Ongoing professional development is critical to the growth, retention, and future of school districts leaders.

Conclusion 1. School districts must provide classified staff with professional development encompassing the seven topics and particularly focus on the four topics identified by the experts as most important. Based on the literature and findings of this research, it was concluded that developing classified leaders requires a broad swath of professional development topics and strategies.

Conclusion 2. School districts must provide job shadowing and on-the-job training to prepare classified business employees to develop the skills, confidence, and knowledge to grow into leadership. Based on the literature and findings of this research, it was concluded that although there are a variety of ways to learn the topics, job shadowing and on-the-job training were in the top three delivery strategies for four of the seven identified professional development topic areas. According to Indeed.com (2019), the purpose of job training is to prepare the employee to perform the job without supervision. One expert reiterated that, “Time and opportunities to learn through practice are essential for any strategy to be effective.” With more than 250,000 classified employees in California public schools and community colleges (California School Employees Association [CSEA], n.d.), developing and enhancing performance and managerial effectiveness has a significant impact on the continued service to K-12 public school students and community college students. Classified employees are a critical resource and school districts must invest in their learning and career advancement. Providing employees with on-the-job training and other programs will enhance their skills and ensure the success of schools and school systems.

Conclusion 3. Coaching and mentoring are integral to the growth and development of classified managers. Based on the literature and findings of this research,

it was concluded coaching and mentoring should be an essential component of classified professional development. Coaching and mentoring were in the top three delivery strategies for four of the seven identified professional development topic areas. Advanced Leadership Development (2018) described several types of professional development, including mentoring, continuing education, publishing, shadowing others, and presentations. Professional development mentoring is a powerful opportunity that can benefit the mentor and mentee. Leaders who coach and mentor classified employees use their expertise and job experience to support employees in growing skills to become leaders themselves. They coach and mentor their employees, provide job training, and offer advice to help emerging leaders avoid pitfalls.

Conclusion 4. Based on the literature and findings of this research, it was concluded that the most important professional development topics to support classified business services employees in becoming managers are not technical skills. Three of the four most important professional development topics, as confirmed by the panel of experts, were what some would label as soft skills: leadership, communication, and working with people. According to Benstead (Breathe, 2023), soft skills such as these help build relationships, enhance motivation, and increase organizational commitment.

Implications for Action

Although classified employees are important to school district success, there is little research regarding the need for training among classified staff who support district operations. The most important asset to any organization is their employees, and training, development, and education are crucial to employee and organization success (Choy,

Chenm & Buggarin, 2006). Professional development opportunities motivate employees to work in many ways and promote creativity in the workplace (Kaplan, 2017).

Implication 1. The legislature must ensure funding is available to counties and districts for classified business services professional development. Through legislation and the annual budget process, the state must ensure funding is provided to support the development of a statewide network of Business Services mentors and coaches deployed through county offices of education to support the leadership growth of classified business services employees.

Implication 2. County offices of education must create stronger classified business services professional learning communities for and between school districts in their counties. Through these professional learning communities, key components and best practices in business services leadership can be shared and presented. County offices should each create a Business Services emerging leaders professional learning community cohort to allow staff to form networks and gain peer support. Creating access to best practice materials and resources will also impact retention and longevity of staff.

Implication 3. The Association of California School Administrators (ACSA) must create a stronger partnership with the California Association of School Business Officials (CASBO) to invest in leadership development of classified business service leaders utilizing the findings from this study. ACSA is a premiere educational entity known for working in the field of K-12 education. CASBO is the premiere membership organization for business services. Working together will assist more employees in becoming better leaders within their own positions as managers.

Implication 4. The data from this study should be utilized by ACSA through the ACSA Women’s Leadership Network to create a program specifically for women in classified business services positions to grow into classified business services leaders. Women continue to comprise many of entry-level financial positions in the workforce but only 6% of senior positions (Quantic, 2022). The four topics of highest importance should each constitute a unit of study of varying length, delivered using the methodologies suggested by the experts. The data related to expert generated strategies for delivery should be used to ensure engagement and learning. Building on this work, ACSA could create a certificate participants earn upon completion to show they are prepared for growing levels of leadership.

Recommendations for Future Research

Based on the research and the findings from this study, the following recommendations are made. The researcher posits this proposed research will strengthen and add additional depth to the topic.

- **Recommendation 1.** Conduct a phenomenological study to explore the lived experiences of current public school district classified managers to identify the professional development that best served them in transitioning into leadership roles.
- **Recommendation 2.** Conduct a mixed-methods study with public school district classified managers, with a survey to identify key topics, delivery strategies, and perception of effectiveness and follow-up interviews to explore responses explore in more depth.

- **Recommendation 3.** Replicate this study and expand the geographic boundaries to be the United States for a boarder perspective than California.
- **Recommendation 4.** Replicate this study in higher education to identify what classified managers need in professional development to grow as leaders in the higher education setting.

Concluding Remarks and Reflections

Classified employees comprise approximately 32% of the public elementary and secondary work force in California (U.S. Department of Education, 2010). At the writing of this research, the nation is clawing its way out of the devastating COVID 19 pandemic and California is investing local, state, and federal dollars to significantly expand the number of classified employees to respond to health, safety, and learning loss. Although classified employees are important to school district success, there is little research regarding the need for training and leadership for these positions. Keeping employees engaged, motivated, and trained must be a priority withing K-12 school districts. Professional development for classified personnel is imperative to retaining staff and helping them become effective supervisors and managers. Despite a great deal of research on professional development for teachers, there is a significant gap in the literature related to professional development for classified employees.

Professional development motivates employees to work in new ways and promotes workplace creativity. Providing a planned and systematic program of professional development, including leadership training, can improve operations at all levels of the school district. Professional development offers opportunities for staff to develop new knowledge and skills, which deepens their commitment to the job. Research

regarding classified professional development, and specifically classified managers, is limited to non-existent. This gap serves to hold classified staff in place and keeps them from growing into their potential.

Over the next 20 years, professional development will be a necessity as more employees are promoted to management positions within school districts. Professional development workshops and training must be offered within school districts. Early career professional development can help staff become productive leaders who can build a culture within their own departments that supports ongoing growth and professionalism. Ensuring all employees receive quality training can create knowledgeable leaders to inspire the next generation. This study confirmed the need for professional development for managers to become skillful leaders. The process was not without challenges. The opportunity to modify my own leadership by learning worked best by focusing on several distinct aspects of my position as a business manager. This opportunity also provided me with insights about what other experts view as characteristics of a good leader.

During this study, I was honored to learn from the experts about the business services field and needs. I am grateful for the time they took to provide their knowledge and expert experience to this study and the field. This study opened my mind and made me a better leader, and I hope this can shape support systems to help others on their leadership journey as classified managers.

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APPENDICES

APPENDIX A – SYNTHESIS MATRIX

	Frameworks	Social Role Theory	Direct Managers	Role Theory	Leadership	Professional Development	Professional Development Examples
Advanced Leadership Development (2018)					X		
Austin, A.E., & Sorcinelli, M.D. (2013)						X	
Avci, A. (2016).				X			
Barakos-Cartwright, R. (2012)				X			
Batten, D. (2010)	X						
Bellanca, J. (2009)						X	
Berger, J., & Zelditch, M. (2002)			X				
Borrás, B., Edquist, C. (2015)				X			
Bonk, M. (2007)				X			
Brown, A. (2016)	X						
Bruffee, Kenneth A. (1993)		X					
Buckner, K.G., Jr. (2002)					X		
Bureau of Labor Statistics (2017)			X				
Bureau of Labor Statistics (2019)			X				
Burns, J. M. (1978)					X		
Cahill, R. (2008)	X						
California Department of Education (2018)					X		
California Department of Education (2019)			X				
California Legislative Information. (2013)						X	
California School Employees Association (2018)						X	
Cannata, M., & Penaloza, R. (2012)	X						
Cardno, C. (2005)						X	
Carey, J., Harrity, J., & Dimmitt, C. (2005)						X	
Center for School Change (1999)	X						
Central School District (2019)	X						
Chaffey Joint Union High School District (2018)	X						X
Chakraborty Saha, S. (2013)							X
Chia-Chien, H., & Brian, A. S. (2007)	X			X			
Chin, J. L. (2007)						X	X

Chino Valley Unified School District (2019)						X	
Choy, S.P., Chen, X., and Buggarin, R. (2006)						X	
Clarke, E. e. (2012)							
Clayton, M. J. (1997)	X						
Coffield, F., Mosleley, D., Hall, E., & Ecclestone, K. (2004)		X		X			
Collins, D. (1997)					X	X	
Corcoran, T. (2003)	X						
Cornish, E. (1977)							
Covey, S. (2019)	X						
Craig, W. (2018)				X	X		
Crow, T. (2015)	X					X	
Correll, S., & Ridgeway, C. (2003)	X	X					
Custer, R. L., Scarcella, J. A., & Stewart, B. R. (1999)	X						
Dalkey, N. C., Rouke, D. L., Lewis, R., & Snyder, D. (1972)							X
Danielson, C. (2006).					X		
Della Savia, R. (2014)				X			
Demirezen, M. (1988)				X			
Donohue, T. J. (2017)			X				
DuFour, R. (2004)					X		
Eisenberger, R., & Stinglhamber, F. (2011)		X					
Economic Policy Institute (2020)	X		X				
El Mhouti, A., Nasseh, A., Erradi, M., & Vasqu�ez, J. M. (2017)	X						
Eraut M. (2004)		X					
Emerson, H., & Toepoel, V. (2017)	X			X			
Fike Wade, J. (1987).							X
Fine, C., & Raack, L. (1994)						X	
Fontana Unified School District, (2021)						X	
Fullan, M. (1995)	X			X			
Funding for Education. (2001)				X			
Funk, E. (2013).						X	
Gallup (2020).		X					
Garc�a-Morales, V. J., Jim�enez-Barrionuevo, M. M., & Guti�errez-Guti�errez, L. (2012).				X			X
Gentry, W.A., Eckert, R.H., Stawiski, S.A., & Zhao, S. (2016).							X
Gordon, A., & Yukl, G. (2004).	X				X		
Grannan, S., & Calkins, S. (2018).	X						
Gusky T. and Huberman, M. (1995).						X	
Guskey, T.R. (1995).						X	
Guskey, T. R. (2000).	X					X	

Guskey, T. R. (2003).	X					X	
Guskey, T. R. (2009).	X					X	
Guskey, T. R. & Yoon, K.S. (2009).	X					X	
Halbert, G. (2016).			X				
Harris, J. E.					X		
Hassel, E. (1999).					X	X	
Haycock, K., Jerald, C., & Huang, S. (2001).	X			X			
Heathfield, S (2019).				X			X
Helmer, O. (1967).							X
Henry, B. W., and Malu, K. F. (2011).				X			
Hill, P., & Brooks, S. (2004).				X			
Hirsh, S. (2005).		X		X			
Hirsh, S. (2014).	X					X	
Horner, M. (1997).				X			
Houston, P.D. (2002).			X				
Hutchins, D. A. (2019).				X			X
Jacobson, E., Leibel, M., Pitkin, R., & Clifton, H. (2020).		X		X			
Joyce, B., & Showers, B. (1995).				X			X
Karoly, L. & Panis, C.W.A., (2004).					X	X	
Kearney, S. (2017).	X	X					
Knowles, M. (1975).				X	X		
Kuligowski, K. (2019).				X	X		
Leahey, T. (2016).						X	
Learning First Alliance. (2000).				X		X	
Lecompte, M.D. & Dworkin, A.G. (2002).					X		
Linstone, H.A. & Turoff, M. (2002).	X						X
Little, J. W. (1995).					X	X	
London, M & Manetto, N. (2010).			X			X	X
Lovell, L J. (2004).				X			
MacGregor, J., & Matthews, R. S. (1994).		X		X			
Malik, M. (2016).				X		X	
Meador, D. (2019).			X	X			
McClelland, D. C., & Boyatzis, R. E. (1982).				X	X		
McMillian, J. & Schumacher, S. (2010).	X						
Meaklim, T., & Sims, J. (2011).	X			X			
Minnesota School Board Association, (n.d.).	X		X				
Mizell, H. (2010).					X	X	
Moody, V. J. (2012).			X				
Morra, L. G. (1995).						X	X
Movchan, S. (2018).							X
Nair, S. K. (2009).					X		
National Academies Press (1999).	X						

National Center for Education (2020).						X	
National Center for Education (2019).							X
National Conference of State Legislatures (2010).	X				X		
National Staff Development Council (2001).	X						
National Staff Development Council (2006).	X						
Nitta, K., Wrobel, S., Howard, J., & Jimmerson-Eddings, E. (2009).			X				
Noe, R. A., Tews, M. J., & Marand, A. D. (2013).			X				
Obama Promotes Job Training to Spur Hiring. (2011, June 11).	X						
Odden, A., Archibald, S., Fermanich, M., & Gallagher, H. (2002).	X					X	
Ontario-Montclair School District (2007).					X	X	
Ontario-Montclair School District (2016).			X				X
Patten, M. (2012).	X						
Peticca-Harris, M. & Mc Kenna, S. (2013)				X		X	
Phelps, S., & Lehman, J. (2005).						X	X
Public Policy Institute of California (2018).			X	X			
Redlands Unified School District (2021).						X	X
Reeves, P., & Berry, J. E. (2008).	X		X	X			
Reid, H., & Soan, S. (2019).				X			X
Rozenszayn, R., & Assaraf, O. B. (2011).						X	X
Saar, E., & Räis, M. L. (2017).			X				X
Sable, J., & Hill, J. (2006).			X		X	X	
San Bernardino City Unified School District (2021).			X			X	X
Sangiuliano, G. (2000).	X			X			
Schaufeli, W. B., Bakker, A. B., & Salanova, M. (2006).				X			
Schmidt, S. W. (2009).	X		X				X
Schmidt, S. W. (2004).	X						X
Shanock, L. R., Eisenberger, R., Heggstad, E. D., Malone, G., Clark, L., Dunn, A. M., Kirkland, J., & Woznyj, H. (2019, July 25).	X			X			
Silver, M., Lochmiller, C.R., Copland, M.A., & Tripps, A.M. (2009).			X	X	X		
Sincero, S. M (2011).	X	X					
Sketch, E. (2001).			X	X	X		

Skulmoski, G. J., & Harman, F.T. (2007).	X	X					
Smith, J. E. (1989).	X	X					
Smith, M. K. (2015).	X						
Smolka, C. M. (2002).	X			X			
Sparks, D. (202).	X			X			
Starkey, C. J. (2012).			X	X	X		
Stine, D. E. (1998).			X	X	X		
Sutherland Olsen, D. (2016).	X						
Taylor, E. W. (1993).	X						
Taylor E.W. (2017)	X			X			
The National Academies of Sciences Engineering Medicine (1999).		X					
Tisdell E. J., Redmon Wright R., Taylor E. W. (2016).			X	X			
Tollarová, B., & Furmaníková, L. (2017).	X		X				
Tosko, M. (2005).					X		X
Turpin, G. H. (1970).	X						
Ulschak, F. L. (1983)			X				X
Upland Unified School District (2021).	X					X	
U.S. Department of Education. (2010).	X						
U.S. Department of Education. (N.P.).	X						
Van Manen, M. (1990).	X						
Victor Valley Union High School District (2021).			X			X	
Vygotsky, L., (1978).	X				X		
Walker, M. A. (2018).			X	X			
Wang, D.-S., & Hsieh, C.-C. (2013).			X		X		
Waltman, J (2000).	X						
Wahlstrom, K., & Louis, K.S. (2008).		X	X				
Weber-Mayrer, M. M. (2016).				X		X	
Wheeler, D. R. (1956).			X		X		
Wenson, J. (2010).	X			X			
Williams, D. S. (2013).				X			
Xu, J., & Cooper Thomas, H. (2011).	X			X			
Yates, M. M. (2009).	X			X			
Yousuf, M. I. (2007).	X						
Zaharis, M. (2019).	X	X		X			
Zimmer, G. (1999).							X

APPENDIX B - EXPERT PARTICIPANT INVITATION

Dear Classified Professional Development Expert,

I am a doctoral candidate in the University of Massachusetts Global's Doctorate of Education in Organizational Leadership program in the School of Education. The purpose of this letter is to determine your interest and eligibility as a candidate to participate in the Delphi study which seeks to identify and describe professional development topics required to prepare classified managers in unified school district business services departments as effective leaders.

You have been selected as a possible participant for the panel of classified professional development experts. To ensure quality data, I am seeking committed individuals who are willing to participate throughout the study with good faith responses and interest in sharing expert opinions that can inform the field of professional development for classified managers. There is no anticipated risk or stressors other than time constraints, but the benefit may serve to provide guidance in planning for the future of education. The study will consist of a series of three survey rounds delivered by e-mail which will include a SurveyMonkey link. Your commitment to completing all three rounds is important to the success of the research study. Each survey is designed to take 10-15 minutes or less to complete, with a seven-day window to reply for each survey.

It is expected that participants meet one or more of the following criteria:

- Exemplary classified manager in a California Public school district with at least 3 years' experience and the referral of their Chief Business Official (CBO)
- Exemplary provider of professional development to California Public school district classified business managers for at least 3 years as identified by at least 2 school district CBOs
- Representative with expertise in classified management professional development from a variety of entities deemed premiere education organizations offering classified professional development for classified business managers, e.g., AASA, ACSA, CASBO, CSEA, CSBA, Community Colleges or FCMAT.
- Published researcher/writer/author/presenter on topic of professional development for classified business managers

I am asking for your preliminary agreement to participate in this study. If you meet the above-listed criteria and are interested in participating in the Delphi study, please confirm your participation by responding to this email.

In addition, please indicate your preferred e-mail address in which you would like to receive the following Delphi Rounds - subject line will be "Classified Professional Development Delphi Round I, II, or III":

E-mail: _____

Other Contact information: _____

Juliet Castorena Orozco
Doctoral Candidate, UMASS Global
Chair: Dr. Cindy Petersen

APPENDIX C – PARTICIPANT’S BILL OF RIGHTS



UMASS GLOBAL INSTITUTIONAL REVIEW BOARD Research

Participant’s Bill of Rights

Any person who is requested to consent to participate as a subject in an experiment, or who is requested to consent on behalf of another, has the following rights:

1. To be told what the study is attempting to discover.
2. To be told what will happen in the study and whether any of the procedures, drugs or devices are different from what would be used in standard practice.
3. To be told about the risks, side effects or discomforts of the things that may happen to him/her.
4. To be told if he/she can expect any benefit from participating and, if so, what the benefits might be.
5. To be told what other choices he/she has and how they may be better or worse than being in the study.
6. To be allowed to ask any questions concerning the study both before agreeing to be involved and during the course of the study.
7. To be told what sort of medical treatment is available if any complications arise.
8. To refuse to participate at all before or after the study is started without any adverse effects.
9. To receive a copy of the signed and dated consent form.
10. To be free of pressures when considering whether he/she wishes to agree to be in the study.

If at any time you have questions regarding a research study, you should ask the researchers to answer them. You also may contact the UMASS GLOBAL Institutional Review Board, which is concerned with the protection of volunteers in research projects. The UMass Global Institutional Review Board may be contacted either by telephoning the Office of Academic Affairs at (949) 341-9937 or by writing to the Vice Chancellor of Academic Affairs, UMASS GLOBAL, 16355 Laguna Canyon Road, Irvine, CA, 92618.

APPENDIX D – INFORMED CONSENT FORM

INFORMATION ABOUT: Professional Development for Classified Managers within the Business Services Departments at California Public School Districts

RESPONSIBLE INVESTIGATOR: Juliet Castorena Orozco

PURPOSE OF STUDY: You are being asked to participate in a research study conducted by Juliet Castorena Orozco, a doctoral student from the School of Ed at UMASS GLOBAL. The purpose of this research study is to identify and describe professional development topics required to prepare classified managers in unified school district business services department as effective leaders. This study also seeks to identify the degree of importance of each professional development topic and the best strategies to address those topics. The results of this study may assist districts in the design of professional development for classified managers.

By participating in this study, I agree to participate in three survey rounds. The surveys should take 5-15 minutes to complete and will be conducted via SurveyMonkey. I understand:

- a) There are minimal risks associated with participating in this research. I understand that the Investigator will protect my confidentiality by keeping the identifying codes and research materials in a locked file drawer that is available only to the researcher.
- b) I understand that the surveys will be electronic and upon completion of the study all records will be destroyed. All data and consents will be securely stored for three years after completion of data collection and confidentially shredded or fully deleted.
- c) The possible benefit of this study to me is that my input may help add to the research regarding professional development for classified managers. The findings will be available to me at the conclusion of the study and will provide new insights into professional development. I understand that I will not be compensated for my participation.
- d) If you have any questions or concerns about the research, please feel free to contact Juliet Castorena Orozco at jcastore@mail.umassglobal.edu or by phone at 909.921.8419; or Dr. Cindy Petersen (Advisor) at cpeterse@umassglobal.edu.
- e) My participation in this research study is voluntary. I may decide to not participate in the study and I can withdraw at any time. I can also decide not to answer particular survey questions if I so choose. I understand that I may refuse to participate or may withdraw from this study at any time without any negative consequences. Also, the Investigator may stop the study at any time.
- f) No information that identifies me will be released without my separate consent and that all identifiable information will be protected to the limits allowed by law. If the study design or the use of the data is to be changed, I will be informed and my consent re-obtained. I understand that if I have any questions, comments, or concerns about the study or the informed consent process, I may write or call the Office of the Vice Chancellor of Academic Affairs, UMASS GLOBAL, at 16355 Laguna Canyon Road, Irvine, CA 92618, (949) 341-7641.

I acknowledge that I have received a copy of this form (informed consent) and the UMass Global Bill of Rights.

I have read the above and understand it and hereby consent to the procedure(s) set forth.

Signature of Participant:

Signature of Principal Investigator:

APPENDIX E – ROUND 1 SURVEY



Survey Round 1: Professional Development for Classified Managers Within the Business Services Departments at California Public School Districts.

You are being asked to participate in a research study conducted by Juliet Castorena Orozco, a doctoral student from the School of Education at the University of Massachusetts Global. The title of this study is: Professional Development for Classified Managers Within the Business Services Departments at California Public School Districts.

The purpose of this Delphi study was to identify and describe professional development topics required to prepare classified managers in school district business services department as effective leaders as perceived by a panel of experts. This study also sought to identify the degree of importance of each professional development topic and the best strategies to address those topics as perceived by a panel of experts.

There will be 3 rounds of surveys. Each round is expected to take approximately 10-15 minutes each. The total time for all three rounds are expected to be approximately 30-40 minutes in total. Your responses will be confidential. The survey questions will pertain to classified professional development of business services managers.

Your participation in these electronic surveys is voluntary. You may choose not to participate. If you decide to participate, you can withdraw at any time.

As a study participant, I understand that:

a) No information that identifies me will be released without my separate consent and that all identifiable information will be protected to the limits allowed by law. If the study design or the use of the data is to be changed, I will be informed and my consent re-obtained. There are no foreseeable risks or discomforts associated with participating in this research. I understand that the Investigator will protect my confidentiality by keeping identifying responses and research materials in a password locked computer that is available only to the researcher. All information will be identifier-redacted and my confidentiality will be maintained. All data and consents will be securely stored for three years after completion of data collection and confidentially shredded or fully deleted.

b) I understand that I may refuse to participate in or I may withdraw from this study at any time without any negative consequences. Also, the investigator may stop the study at any time. I understand that if I have any questions, comments, or concerns about the study or the informed consent process, I may write or call the Office of the Vice Chancellor of Academic Affairs, University of Massachusetts Global, at 16355

Laguna Canyon Road, Irvine, CA 92618, (949) 341-7641.

If you have any questions about completing this survey or any aspects of this research, please contact Juliet Castorena Orozco (Investigator) at jcastore@mail.umassglobal.edu or by phone at (909) 921-8419; or Dr. Cindy Petersen, Dissertation Chair, at cpeterse@umassglobal.edu.

* 1. Please provide your name.

* 2. Please provide your email address.

* 3. This survey will not open for responses unless you agree to participate.

- AGREE: I acknowledge receipt of the complete Informed Consent packet and "Bill of Rights." I have read the materials and give my consent to participate in the study.
- DISAGREE: I do not wish to participate in this electronic survey.



Survey Round 1: Professional Development for Classified Managers Within the Business Services Departments at California Public School Districts.

Expert Panel Participant Demographics

* 4. Gender: How do you identify

- Women
- Man
- Non-binary
- Agender
- Transgender
- Genderqueer or gender nonconforming
- Prefer not to disclose
- Other (please specify)

* 5. With which race/ethnicity do you identify? (Select ALL that apply)

- African American or Black
- American Indian or Alaska Native
- Asian American or Asian
- Hispanic or Latinx
- Middle Eastern or North African
- Pacific Islander
- White or Caucasian
- An identity not listed, self-identify

* 6. Please indicate your age range:

- 18-24
- 25-34
- 35-44
- 45-54
- 55-64
- 65-74
- 75+
- Prefer not to disclose

* 7. Please indicate your highest level of education completed:

- HS diploma
- Some college
- Associates degree (AA, AS)
- Bachelor's degree (BA, BS)
- Master's degree (MA, MS, MEd, MEng, etc)
- Professional degree (MD, DDS, JD, etc)
- Doctoral degree (PhD, EdD)
- Prefer not to disclose
- Other (please specify)



Survey Round 1: Professional Development for Classified Managers Within the Business Services Departments at California Public School Districts.

Expert Panel Generation of Professional Development Topics

Based on your experience and expertise in providing professional development please identify the professional development topics you believe are required to prepare classified managers as effective leaders in California public school districts? Please provide your answers below with a short description.

* 8. 1st Professional Development Topic

* 9. 2nd Professional Development Topic

* 10. 3rd Professional Development Topic

* 11. 4th Professional Development Topic

* 12. 5th Professional Development Topic

13. If you have additional topics beyond the five above, please enter them in the box below separated by a comma.



Survey Round 1: Professional Development for Classified Managers Within the Business Services Departments at California Public School Districts.

Thank you for your participation in Round 1. Your time, ideas, and effort are invaluable to this study. I look forward to reading your responses. All Round 1 responses will be analyzed and presented in Round 2.

APPENDIX F – ROUND 2 SURVEY

Round 2 Survey: Professional Development for Classified Managers within the Business Services Departments at California Public School Districts

Welcome back and thank you again for participating in this important research.

In Round 1 of this study, you were asked to identify professional development topics you believe are required to prepare classified managers as effective leaders in school districts.

The data from Round 1 is presented below with common ideas combined. *The topics are listed in random order.*

In this second round, you will review the combined Round 1 data and use the following 5-point Likert scale to rate your belief regarding the importance of the professional development topics. You will additionally be asked to generate strategies for delivering these topics.

- 5=Extremely Important**
- 4=Very Important**
- 3=Important**
- 2=Somewhat Important**
- 1=Not Important**

* 1. Please provide your name.

* 2. Please provide your email address.

After reviewing the list of professional development topics generated in round 1, please rate using the identified Likert scale for importance.

* 3. Please rate using the identified Likert scale for importance.

	Not important	Somewhat important	Important	Very important	Extremely important
School Finance/Funding; from larger context down to LCFF/LCAP	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

List strategies for delivering PD for this topic (use comma to separate)

* 4. Please rate using the identified Likert scale for importance.

	Not important	Somewhat important	Important	Very important	Extremely important
Leadership; Lead, manage, motivate, use emotional Intelligence, create trust, model	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

List strategies for delivering PD for this topic (use comma to separate)

* 5. Please rate using the identified Likert scale for importance.

	Not important	Somewhat important	Important	Very important	Extremely important
Communication; listening, speaking, writing, presenting, translating complexity	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

List strategies for delivering PD for this topic (use comma to separate)

* 6. Please rate using the identified Likert scale for importance.

	Not important	Somewhat important	Important	Very important	Extremely important
Technical Skills; including (not limited to) accounting, auditing principles, purchasing, food services, sped, etc.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

List strategies for delivering PD for this topic (use comma to separate)

* 7. Please rate using the identified Likert scale for importance.

	Not important	Somewhat important	Important	Very important	Extremely important
Budgeting Basics; creating, monitoring, updating annual and multi-yr projections	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

List strategies for delivering PD for this topic (use comma to separate)

* 8. Please rate using the identified Likert scale for importance.

	Not important	Somewhat important	Important	Very important	Extremely important
Supervision and Mgt; hiring, building capacity, retention, team building, delegation, evaluation	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

List strategies for delivering PD for this topic (use comma to separate)

* 9. Please rate using the identified Likert scale for importance.

	Not important	Somewhat important	Important	Very important	Extremely important
Human Resources; employment law, legal provisions, and CBA language including discipline	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

List strategies for delivering PD for this topic (use comma to separate)

* 10. Please rate using the identified Likert scale for importance.

	Not important	Somewhat important	Important	Very important	Extremely important
Law and Politics; legislation, advocacy, case law, political perspectives	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

List strategies for delivering PD for this topic (use comma to separate)

* 11. Please rate using the identified Likert scale for importance.

	Not important	Somewhat important	Important	Very important	Extremely important
Conflict Resolution	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

List strategies for delivering PD for this topic (use comma to separate)

* 12. Please rate using the identified Likert scale for importance.

	Not important	Somewhat important	Important	Very important	Extremely important
Ethical principles incl risk management and fraud prevention	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

List strategies for delivering PD for this topic (use comma to separate)

* 13. Please rate using the identified Likert scale for importance.

	Not important	Somewhat important	Important	Very important	Extremely important
Succession Planning	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

List strategies for delivering PD for this topic (use comma to separate)

* 14. Please rate using the identified Likert scale for importance.

	Not important	Somewhat important	Important	Very important	Extremely important
Effectively working with people; across teams, departments and entities	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

List strategies for delivering PD for this topic (use comma to separate)

15. If any additional Professional Development topics have come to mind for you since finishing Round 1, you have the opportunity to add those ideas at this time. Please use the space below to add any other PD topics you have thought of since Round 1 (not required).

Thank you for your participation in Round 2. Your time, ideas, and effort are invaluable to this study. I look forward to reviewing your responses.

APPENDIX G – ROUND 3 SURVEY



Round 3 (Final) Survey: Professional Development for Classified Managers within the Business Services Departments at California Public School Districts

Just a reminder of our previous work: In Round 1 of this study, you identified Professional Development topics to prepare Classified Managers in California Public School Districts.

In Round 2, you used a 5-point Likert scale to rate the importance of the topics as well as generating strategies for delivering each professional development topic.

In this final round (round 3), only those professional development topics from Round 2 that received an average rating of at least 4 on the Likert scale for importance are presented. Additionally the strategies for each topic generated in Round 2 are presented here. In this round, you will be asked to re-rate importance and then to identify the 3 most impactful strategies per topic.

- 5=Extremely Important**
- 4=Very Important**
- 3=Important**
- 2=Somewhat Important**
- 1=Not Important**

* 1. Please provide your name.

* 2. Please provide your email address.

The important classified professional development topics with an average rating of 4 or greater are listed below. Using the 5 point Likert scale for importance, please **re-rate** each topic below. Note: in the questions that follow you will be identifying the 3 most impactful strategies for addressing each topic.

3. Please rerate the following topics for importance.

	Not important	Somewhat important	Important	Very important	Extremely important
Topic Idea (Mean Rating)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Topic Idea (Mean Rating)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Topic Idea (Mean Rating)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Topic Idea (Mean Rating)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Topic Idea (Mean Rating)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Topic Idea (Mean Rating)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Topic Idea (Mean Rating)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Topic Idea (Mean Rating)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Topic Idea (Mean Rating)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

4. Please select the 3 most impactful strategies for addressing <insert topic >.

- Strategy 1
- Strategy 2
- Strategy 3
- Strategy 4
- Strategy 5

5. Please select the 3 most impactful strategies for addressing <insert topic >.

- Strategy 1
- Strategy 2
- Strategy 3
- Strategy 4
- Strategy 5

6. Please select the 3 most impactful strategies for addressing <insert topic >.

- Strategy 1
- Strategy 2
- Strategy 3
- Strategy 4
- Strategy 5

7. Please select the 3 most impactful strategies for addressing <insert topic >.

- Strategy 1
- Strategy 2
- Strategy 3
- Strategy 4
- Strategy 5

8. Please select the 3 most impactful strategies for addressing <insert topic >.

- Strategy 1
- Strategy 2
- Strategy 3
- Strategy 4
- Strategy 5

9. Please select the 3 most impactful strategies for addressing <insert topic >.

- Strategy 1
- Strategy 2
- Strategy 3
- Strategy 4
- Strategy 5

10. Please select the 3 most impactful strategies for addressing <insert topic >.

- Strategy 1
- Strategy 2
- Strategy 3
- Strategy 4
- Strategy 5

11. Please select the 3 most impactful strategies for addressing <insert topic >.

- Strategy 1
- Strategy 2
- Strategy 3
- Strategy 4
- Strategy 5

12. Please select the 3 most impactful strategies for addressing <insert topic >.

- Strategy 1
- Strategy 2
- Strategy 3
- Strategy 4
- Strategy 5

13. Please select the 3 most impactful strategies for addressing <insert topic >.

- Strategy 1
- Strategy 2
- Strategy 3
- Strategy 4
- Strategy 5

14. Any final closing comments, clarifications or recommendations based on the three rounds of this Delphi?

Delphi Round 3 Survey: Professional Development for Classified Managers within the Business Services Departments at K-8 School Districts

You are done! A sincere and grateful THANK YOU for your participation in this study. It was an honor to include your expert opinions, ideas, and thoughts in my dissertation research.

15. If you would like a copy of this study's results once complete, please let me know below.

- Yes, please send me a copy of the results.

APPENDIX H – ROUND 1 LETTER

January 30, 2023

Dear Classified Professional Development Expert Panel Member,

Thank you for agreeing to participate in the study: Professional Development for Classified Managers within the Business Services Departments in California Public School Districts.

Study Focus: To identify and describe professional development topics required to prepare classified managers in school district business services departments as effective leaders. Additionally, to identify the degree of importance of each professional development topic and the best strategies to address those topics.

As an experienced expert, your perspective of the necessary topics to prepare classified managers will strengthen this study. For Round 1, you will participate with approximately 23 other experts to identify professional development topics you believe are required to prepare classified managers as effective leaders. Please provide a short description for each topic. I will also be collecting some demographic information during this initial round.

In future rounds, you will be asked to determine and provide your opinions on the topic's importance as well as strategies to deliver professional development.

Attached to this email is the Participants Bill of Rights and the Informed Consent. The following link will direct you to the Survey Monkey survey that will begin Round I. In the survey, you will be asked to confirm that you have received and understand these documents.

Link: [REDACTED]

There will be a seven (7) day window to complete and return the questionnaire; please contact me should you need to extend this deadline. Please feel free to contact me with any questions or concerns.

Sincerely,

Juliet Castorena Orozco
Doctoral Candidate, UMASS Global
[REDACTED]
Chair: Dr. Cindy Petersen

APPENDIX K – ROUND 2 LETTER

February 15, 2023

Dear Classified Professional Development Expert,

Welcome to round 2! Thank you for completing your round 1 responses of Professional Development for Classified Managers within the Business Services Departments at California Public School Districts.

Just a reminder of the study focus: To identify and describe professional development topics required to prepare classified managers in school district business services departments as effective leaders. Additionally, to identify the degree of importance of each professional development topic and the best strategies to address those topics.

The data collected from round 1 as generated by the experts are presented. In this round (round 2), you will be asked to **rate each of these items on a 5-point Likert scale for importance**. In addition, you will have an opportunity to **contribute additional ideas for professional development topics**. Finally, you will be asked to **generate strategies to deliver the professional development topics identified**.

The following link will direct you to the Survey Monkey survey that will begin Round 2.

Link: [REDACTED]

There will be a seven (7) day window to complete and return the questionnaire. Thank you in advance for your continued commitment to completing all three rounds of this important study. Please feel free to contact me with any questions or concerns.

Sincerely,

Juliet Castorena Orozco

Doctoral Candidate, UMASS Global
[REDACTED]

Chair: Dr. Cindy Petersen

APPENDIX L - ROUND 3 LETTER

March 7, 2023

Dear Classified Professional Development Expert,

Welcome to Round 3, the final round of the study *Professional Development for Classified Managers within the Business Services Departments in California School Districts*. Thank you for completing and returning your Round 2 responses. The time, effort, and care you extended to date is greatly appreciated. Once you have returned this final round you will have completed the data collection process for this study.

To summarize:

In Round 1, you and 21 other Experts identified professional development topics for classified managers.

In Round 2, the topics were presented without duplication, and you rated the importance of those topics along with generating strategies for addressing each topic.

In this final round (round 3), you will now have the opportunity to review the professional development topics with the highest importance ratings and are now asked to **re-rate the level of importance as well as identify the most impactful strategies to address each topic**. Your final comments will add depth and clarity regarding your perceptions. Please allow approximately 15 to 20 minutes to complete Round 3.

In order to complete Round 3, please use the following link to access the survey:

Link: 

Thank you for your time, expert perceptions, and support of this study. Please feel free to contact me should you have questions or concerns.

Respectfully and with gratitude,

Juliet Castorena Orozco

Juliet Castorena Orozco Doctoral Candidate,
UMass Global
Chair: Dr. Cindy Petersen