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ABSTRACT

Dr. Larry W. Hughes and Dr. C. M. Achilles of the University of Tennessee, Knoxville, conducted a national survey for the Office of Education on educational cooperatives--studying and reporting on the nature and kind of cooperative endeavors, their organization, governance, financial arrangements, services, and personnel. Their study focused upon educational cooperative arrangements that primarily influence elementary and secondary education and that have some emergent or special functions. PREP kit 23, "Educational Cooperatives," was adapted from the final report of this project. In 10 documents the report covers such topics as intermediate educational service agencies; voluntary educational cooperatives; school study or development councils; industry/education cooperatives; and State legal arrangements, personnel, and central facilities for educational cooperatives; and provides lists of current documents and audiovisual materials available on the topic. The final report will be available in microfiche and hard copy from EDRS. (Author/LS)

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INTERPRETIVE REPORTS OF EDUCATIONAL RESEARCH AND DEVELOPMENT

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PREP BRIEF

No. 23

EDUCATIONAL COOPERATIVES

The rapid expansion and increase in the number and type of educational cooperatives indicate to many educators and school boards that cooperative arrangements have the potential to improve educational practice. The move toward cooperation appears to have originated as a function of or for assistance to small and rural schools striving to offer the equality of educational opportunity afforded students of large urban and suburban school districts. However, many large school systems are also turning to educational cooperatives for new and expanded services.

Educational cooperatives allow schools to respond more rapidly to social demands and needs; marginal or socially relevant programs can be experimented with more easily in a cooperative; "high risk" ventures can be spread over several districts; and there is less criticism if a cooperative program does not prove to be effective during the first few years of operation. The educational cooperative or regional agency provides much of the flexibility and service capability of large districts while allowing for local control and direction of the individual districts or schools.

Types of Cooperatives and Examples

- *Intermediate educational service agencies*--the second of a three-echelon formal educational structure, located between the State office of education and the local district.
  - Colorado: Boards of Cooperative Services (BOCS)
  - Iowa: Regional Educational Service Agencies (RESA)
  - Nebraska: Educational Service Units (ESU)
  - New York: Boards of Cooperative Educational Services (BOCES)
  - Oregon: Intermediate Education District (IED)
  - Pennsylvania: Intermediate Unit (IU)
  - Texas: Regional Education Service Center (RESC)
  - Washington: Intermediate School District (ISD)
  - Wisconsin: Cooperative Educational Service Agency (CESA)
- *Voluntary educational cooperatives*--those cooperatives, usually begun at the grass roots level, that are in no way mandated by legislation or regulation.
  - Minnesota: Educational Research and Development Councils, of which there are six; the Central Minnesota Educational Research and Development Council; the Edu-cultural Service Center
  - Connecticut: Area Cooperative Educational Service; Capital Region Education Council; Regional School Service Center
  - Tennessee: Little Tennessee Valley Educational Cooperative; Tennessee Appalachia Educational Cooperative
  - Missouri: Cooperating School Districts of the St. Louis Suburban Area;
  - Oregon: Intermediate Education Districts; Oregon Total Information System
  - Ohio: Cleveland Council of Independent Schools

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- *School study or development councils*--a group of local school systems, loosely confederated and usually under the sponsorship of a college of education, organized for the purpose of solving defined educational problems existing in member schools.

  There are presently 81 councils across the Nation. Some encompass very large geographic areas; others are more restricted. The Associated Public School System, for example, includes school systems across the entire Nation; the Western New York School Study Council has members in one region of a State; the New England School Development Council has member schools in the six New England States; the Public Schools for Cooperative Research includes only certain schools in the eastern portion of Tennessee.
- *School-industry cooperatives*--cooperative programs established by business/industry and the schools to enable both to respond better to the needs of students, the community, and the world of work.

  Educational Research Council of America, Cleveland, Ohio; Greater Wilmington Development Council, Wilmington, Delaware; Institute for Educational Research, Downers Grove, Illinois; Joint Council on Economic Education, New York, New York

Personnel for Cooperatives

The following position titles are indicative of the kinds of educational positions emerging in educational cooperatives, though not always by the specific name given. The positions also provide clues to functions and services provided by cooperatives.

- Educational, Community, and/or Regional Planner
- Educational Evaluator
- Inservice Director
- Program Developer and/or Public Information
- Federal and/or State Program Coordinator
- Personnel Coordinator
- Researcher and Special Programs Coordinator
- Data Processer
- Media and Communications Systems Specialist
- Materials Specialist

For More Information

Dr. Larry W. Hughes and Dr. C. M. Achilles of the University of Tennessee, Knoxville, conducted a national survey for the Office of Education on educational cooperatives--studying and reporting on the nature and kind of cooperative endeavors, their organization, governance, financial arrangements, services, and personnel. Their study focused upon educational cooperative arrangements that primarily influence elementary and secondary education and that have some emergent or special functions.

PREP report #23, "Educational Cooperatives," was adapted from the final report of this project. In 10 documents the report covers such topics as intermediate educational service agencies; voluntary educational cooperatives; school study or development councils; industry/education cooperatives; and State legal arrangements, personnel, and central facilities for educational cooperatives; and provides lists of current documents and audiovisual materials available on the topic. Both the final report and the PREP kit will be available in microfiche and hard copy from the ERIC Document Reproduction Service, Leasco Information Products Co., 4827 Rugby Ave., Bethesda Maryland 20014.

PREP

No. 23

PREP is . . .

- *a synthesis and interpretation of research, development, and current practice on a specific educational topic*
- *a method of getting significant R&D findings to the practitioner quickly*
- *the best thinking of researchers interpreted by specialists in simple language*
- *the focus of research on current educational problems*
- *a format which can be easily and inexpensively reproduced for wide distribution*
- *raw material in the public domain which can be adapted to meet local needs*
- *an attempt to improve our Nation's schools through research*
- P*utting*
  R*esearch into*
  E*ducational*
  P*ractice*

EDUCATIONAL COOPERATIVES

BACKGROUND

Societal changes and new demands upon educational systems require educators to consider and develop new ways of restructuring aspects of school organization to provide more effective and efficient educational programing. Many forces provide impetus for changes, but the problem remains--how best to organize to provide socially responsive systems to help insure quality education in a mass, technologically oriented society.

The problem is complex; it is both urban and rural. The multiplicity of agencies in urban areas suggests the need for new larger structures for educational governance to provide greater coordination with other related community organizations. Yet, there is pressure for accountability, decentralization, and "local" control. Inadequate financing and insufficient pupil population are forcing rural school districts to organize to obtain or share services which singly they cannot provide; yet, again, there is pressure to remain independent and unique to a community.

Until recently, the predominantly used alternative to these problems has been consolidation. (1: 6) However, the intermediate school district and/or the educational cooperative are seen by many educators and citizens as an alternative and, in many instances, a superior solution to consolidation. (2: 3)

The status of local school organization in 1966 showed three basic organizational patterns within the States: a single-echelon system (State education agency (SEA) controls all); a two-echelon

system (SEA and local education agency (LEA)); and a three-echelon system (SEA, an intermediate unit of some sort, and LEA). Only Hawaii has a single-echelon system; the two-echelon system prevailed in the following 17 States, the majority of which are located in the Southeast (Alabama, Alaska, Connecticut, Delaware, Florida, Georgia, Idaho, Kentucky, Louisiana, Maryland, Nevada, New Mexico, North Carolina, Tennessee, Utah, Virginia, West Virginia); and the three-echelon system existed in the remaining 32 States. (3: 17)

Although disparate studies have identified changes in school organization and administration, little has been done to codify or collate data from the various studies. This study focuses on "cooperation in education," a concept receiving considerable attention today with the more persistent reluctance of voters to support school bond issues and budgets. The move toward formal cooperation may be one move toward economic efficiency of school systems, as well as toward a sharing of information to help solve common problems.

The emergence of educational cooperatives, variously organized to serve diverse purposes, promises a response to problems and challenges of society. In an interpretive study supported by the U.S. Office of Education, Dr. Larry W. Hughes, Dr. C.M. Achilles, James Leonard, and Dolphus Spence of the University of Tennessee, Knoxville, examined in some depth data about educational cooperatives. In this report they present and analyze the data on the nature and kind of cooperative endeavors, their organization, governance, finance, services, personnel, and trends. There are many examples for each major classification of educational cooperation; this study highlights only a few, while reviewing and synthesizing many.

The rapid expansion and increase of the number and type of educational cooperatives indicate an implicit assumption by many educators and school boards that cooperative arrangements have the potential to improve educational practice. However, not all educational cooperatives are equally effective or have similar roles or functions; it may be possible to identify constraints upon cooperative activities.

DEFINITIONS OF EDUCATIONAL COOPERATIVES AND STUDY PARAMETERS

Many definitions of educational cooperatives or regional education agencies have appeared in publications or have been offered by experts; some would suffice as an operational definition of educational cooperation. A definition should be broad enough to include all the kinds of educational cooperation included in this study, as well as many cooperative arrangements outside the scope of this study. However, no single definition is appropriate: what is necessary is the understanding of a concept. Thus, there follow some general statements designed to give the reader the "flavor" of the idea of an educational cooperative.

- A cooperative is a consumer's organization started by consumers and not mandated from above; it is a participatory organization.

- An educational cooperative is a joint effort of two or more educational organizations which has as its purpose change and innovation in education and to enlarge the scope, quality, and accessibility of programs and services in education.

- An educational cooperative is built upon an exchange system; it is a voluntary, mutually rewarding system.

- An educational cooperative allows each of the districts to remain independent, is permissive in its operation, works toward comprehensive change, provides a cost effectiveness ratio somewhat lower than an individual district would have if it were working alone, and is primarily interested in developmental aspects of education and programs.

- In a voluntary educational cooperative, employees are not full-time members of a standard political unit such as the local school unit.

- One goal of a cooperative is to provide clients access to certain features of quality education through the pooling and extending of resources. An educational cooperative is generally thought of as a system within a defined region containing a number of contiguous (although not necessarily so) independent *school* districts which develop and share educational resources through the use of such things as communications media, mobile facilities, joint research and development activities, and computer and data processing technology.

- The educational cooperative, a multidistrict confederation, provides the conceptual and organizational framework for local school systems to increase their capabilities to product quality education. . . . (It) provides structure for the joint solution of interdistrict and inter-State educational problems. It also promotes widespread dialog among professional educators and the wider intellectual community. . . . The educational cooperative is a confederation of autonomous school systems whereby each retains local control . . . (and) is not merely a service center or service unit. It is a process whch integrates cooperating schools as its components. . . . (It) is not a consolidation of a few . . . school districts, but a creation of them. (6: 3, 11, 18, 19)

Figure 1 provides a detailed definition of an educational cooperative as set forth by the Appalachia Educational Laboratory (AEL), Charleston, West Virginia, an agency which has been actively promoting educational cooperatives throughout Appalachia. This definition, while satisfactory for cooperatives comprised wholly of school or educational systems, does not specifically include other organizations such as businesses, industry, financial sources and foundations, or service agencies.

WHAT IS IT?

The educational cooperative is a new system of education engineered to increase access to educational opportunity and to improve the quality of education. The educational cooperative can be a federation of small and medium-size school districts, or it can be a decentralized system of education for metropolitan areas, such as New York and Chicago. In either case, a high degree of local participation is retained; a higher degree of equality in *educational opportunity* can be achieved; and advanced educational practices can be introduced and sustained. The educational cooperative gives central consideration to the locus of change as well as the inventions of change.

Through the educational cooperative system of education all school districts can operate under maximum economic conditions, effect better utilization of staff, and improve the cost effectiveness of education. This system can enable education to overcome problems of deprivation, effect higher degrees of individualized instruction, overcome problems of distance and time, and deal more effectively with the knowledge explosion. It is a system designed to effect the regeneration of curriculum development as opposed to add-on curriculum development.

HOW DOES IT WORK?

The educational cooperative is not a superstructure imposed upon existing school systems; it emerges as a creation of them. Small contiguous school systems join together to create the capacities to perform educational operations that cannot be implemented in the present structure. Giant school systems can decentralize into local autonomous units but retain the advantages of the large district. A new administrative structure is established providing for both local autonomy and multidistrict coordination and operation. A new integrated system of instruction is effected through the use of mass and individualized communications media and mobile facilities. A system of planning and evaluation is implemented. An operations system of communications is established, and new administrative practices are introduced incorporating legal and financial requirements, new staff utilization patterns, and new staff training procedures. State departments of education and colleges and universities participate with the local school in responsible roles in the planning and execution of these functions.

New approaches to instruction are required for the operation of the cooperatives system. . . .

Figure 1.--The educational cooperative (7: Excerpts)

Specialized kinds of educational cooperation were identified during this study. When the scope of these cooperatives was reviewed, the project advisory committee and project staff were forced to limit areas of concern of the study. Omitted from the study are educational cooperatives between or among institutions of higher education, specialized vocational or junior college districts, ad hoc projects funded under title III of the Elementary and Secondary Education Act (ESEA), and organizations which have the Federal Government as the sole funding sources, such as the educational laboratories or research and development centers.

Vocational schools and districts are more "local" organizations even though they may serve several districts, and are not really cooperatives in the true sense; pupils are sent to them on a tuition basis or through some other way.

The most important criteria for inclusion in the study were that the cooperative must have a definable board of control and/or formal organizational structure and include an educational organization in the combination; constituent organizations must make some contribution to the cooperative's operation; and the cooperative must have some history of existence or promise of continued existence not dependent totally on Federal funding.

KINDS OF COOPERATIVES IN THE STUDY

Diverse kinds of cooperative arrangements exist in education. Some cooperatives are well known and exist to provide for an extension of the "regular" education program--special vocational and technical school districts, junior or community college districts. Other arrangements are totally federally funded and supported for specific purposes--title V, ESEA, special projects and title IV, ESEA. educational laboratories and research and development centers. Title III projects and centers are supported with Federal funds through a State grant program; institutions of higher education have enough different kinds of cooperative arrangements to justify a separate study.

This study focuses upon educational cooperative arrangements that *primarily* influence elementary and secondary education and that have some emergent or special functions. These educational cooperatives, multi-district units, or regional education agencies (REA) have been grouped in the following categories for purposes of presentation: intermediate educational service agencies, voluntary educational cooperatives, school study or development councils, and school-industry cooperatives.

Intermediate Educational Service Agencies (Units)

Intermediate educational service agencies, or the second of the three-echelon formal educational structure, have existed for many years.

A 1966 study (8) reviewed several questions pertinent to the current study. One major question was: What is the existing structure of the intermediate unit in the 50 States. The following provides a summary of the status of the intermediate unit (one form of educational cooperative) in 1965:

States with no intermediate unit--Alabama, Alaska, Connecticut, Delaware, Florida, Georgia, Hawaii, Idaho, Kentucky, Louisiana, Maryland, Nevada, New Mexico, North Carolina, Rhode Island, Tennessee, Utah, Virginia, and West Virginia.

States with county unit systems--Although the States under this classification had no intermediate units, some had county superintendents of schools. The county superintendent in these cases had full administrative responsibility over county-wide school districts. This arrangement is known as the county unit system and it must be carefully distinguished from the county intermediate unit system where the county superintendent fills an intermediate role.

Four States had all territory located in county-wide school districts. These States were: Florida, New Mexico, Nevada, and West Virginia.

States with some or all county unit systems were: Alabama, California, Florida, Georgia, Kentucky, Louisiana, Maryland, New Mexico, Mississippi, North Carolina, South Carolina, Tennessee, Texas, Utah, Virginia, and West Virginia.

States with intermediate units--The intermediate unit systems described in this section include the county office of education, the supervisory union, and the new form of intermediate unit. These intermediate units are located between the State office of education and the local school district for the purpose of performing various functions deemed necessary in a State system of public education. (8: 15-16)

Twenty-four States maintained a county intermediate unit system in 1965: Arizona, Arkansas, California, Colorado, Illinois, Indiana, Iowa, Kansas, Minnesota, Mississippi, Missouri, Montana, Nebraska, New Jersey, North Dakota, Ohio, Oklahoma, Oregon, Pennsylvania, South Carolina, South Dakota, Texas, Washington, and Wyoming. (8: 17)

Major changes were taking place in at least six of these States in 1965. Colorado, Iowa, Nebraska, and Washington were in the process of forming a new type of intermediate unit. Missouri, Minnesota, and Wyoming were simply abolishing the county office. (8: 17)

The supervisory union--One form of the intermediate unit is found in the New England States where school districts usually coincide

with towns and cities. In situations where the towns are too small to have their own superintendent, several towns join together and employ a common administrator to provide supervision over the schools. This is described as a supervisory union . . . Through the supervisory union, rural districts and small communities are able to join together to obtain professional services that are available to larger urban districts. Connecticut, Maine, New Hampshire, and Vermont are listed as having supervisory unions. (8: 18-19)

The new intermediate unit--The new form of intermediate unit, ideally, would have an elected governing board of education, a professional administrative officer appointed by the governing board, adequate State and local financing, a service area large enough in enrollment to justify a comprehensive program of services for local school districts, and generally serve at the request of local educational agencies.

New York was one of the first States to develop a form of intermediate unit in 1948 when the Board of Cooperative Educational Services came into existence. Since 1955 six other States have enacted legislation making it possible to establish newer forms of intermediate units. These States were: Colorado, Iowa, Michigan, Nebraska, Washington, and Wisconsin. (8: 19)

Since the writing of this study in 1966, two more States have formally developed newer types of intermediate units--Texas (Regional Educational Service Agency) and Pennsylvania (Intermediate Unit).

Voluntary Education Cooperatives

Voluntary educational cooperatives are those cooperative educational arrangements that are in no way mandated by legislation or regulation. (The general concept of voluntary education cooperatives includes the school study or development councils and school-industry cooperatives. Both, however, are treated as separate categories in this report due to their unique functions and structures.) Excluding the study councils, voluntary educational cooperatives generally have a short history of development and are considerably more flexible than older organizations in education; many of these are emerging organizations formed through a grass roots local concern.

Voluntary educational cooperatives generally try to coordinate or harness the strengths and capabilities of the constituents to develop or generate a structure to provide flexibility, power, potential and direction for change and innovation. Voluntary cooperatives often include expanded "mixes" of groups or agencies, such as combinations of local schools, higher education, title III centers, regional educational laboratories, State education agencies, and other social or community agencies. A well-developed voluntary cooperative protects

the autonomy or local control of the basic local unit while providing the benefits of a complex agency. The voluntary educational cooperative stands as an innovative approach to school district organization, and, according to a working draft of the Appalachia Educational Laboratory (6: preface), has the potential to provide:

- An improved design for the provision of leadership services by State departments of education, institutions of higher education, research and development centers, and other agencies and institutions
- A reshaping of the roles and responsibilities of lay school boards and of professional school administrators
- Improved ways of introducing and sustaining new practices and research findings in education
- A vehicle for modernizing the curriculum, including ways of building receptivity to innovation, providing expertise for implementing new approaches to education, and insuring continuous evaluation of the effectiveness of the curriculum
- An economical and efficient plan for providing specialized services too expensive for individual school districts

There presently is concerted action toward the development of voluntary cooperatives in some Appalachian States (Virginia, Kentucky, Tennessee, Pennsylvania, North Carolina, and to a lesser degree, Northern Georgia and Alabama) under the auspices of the Appalachia Educational Laboratory (AEL) and the Appalachian Regional Commission (ARC) with the assistance of other agencies. The Educational Research and Development Councils of Minnesota provide another kind of voluntary cooperative.

School Study or Development Councils

School study councils were initiated in 1942 based upon the late Paul Mort's concept of "pool and share." Although there have been slow periods in the growth of the study council movement, it has been continuous and 1970 saw the development of at least 10 new councils.

A school study council (also often called school development council) is a group of local school systems loosely confederated, usually under the sponsorship of a college of education, organized for the purpose of solving defined educational problems existing in member schools. Although different in organization from other educational cooperatives, it is formed for many of the same purposes; i.e., it aims to accomplish through shared resources that which could not efficiently be accomplished singly. Major differences seem to lie in the nature and kind of services

which are shared and in the unique role played by institutions of higher education with member schools.

In 1969, the National School Development Council (NSDC), incorporated under the laws of Massachusetts, was formed to provide a central office for study and development councils. The NSDC lists 80 active study councils in 1970.

Study councils, although primarily centered in the Northeast, have spread throughout the United States and are located in 31 States. One of the study councils, the New England School Development Council, spans six States and has over 250 member school districts.

Dissemination and information sharing are major intercouncil activities. Many councils share their publications and research results at no cost. This activity provides a network for channeling ideas from all over the United States into local schools.

Study councils have often provided the base for development of other cooperative activity, including more structured and formal cooperative arrangements. They have sometimes coopted the title III functions for a region.

School-Industry or Industry-Education Cooperatives

Another phenomenon in the development of educational cooperatives is the industry-education cooperative. Most of the industry-education cooperatives are found in urban areas with population of 500,000 or more, usually working with schools with heavy concentration of urban poverty. Industry-education councils, usually operating on a regional basis, are scattered throughout the Nation. Prominent industry-education or business-education councils are found in California, Connecticut, Delaware, Illinois, Iowa, Massachusetts, Ohio, Oregon.

A major force in the development of industry-education cooperation is the Education Research Council (ERC) of America, located in Cleveland, Ohio.

The industry-education cooperative is a different organization and concept from the emerging "education-business partnership" where business profit is a major goal, although both arrangements may be working directly for the improvement of education.

Other Cooperative Arrangements

Some special-purpose cooperatives and some cooperatives that combine elements of other classifications of cooperatives fall into this category. Regional Instructional Materials Centers (in Pennsylvania, for

example) derive funds both from member districts and from Federal sources. The primary purpose of the RIMC is to provide increased media services and materials to member schools. Other special-purpose cooperatives can be identified that have specific and quite limited purposes such as computer assistance or television network services to member districts.

In some cases school study councils have either become the focus of title III, ESEA, activity (for example, the Genesee Valley School Development Association and the Western New York School Development Council); or the title III activity has basically taken over the functions of the study council or the cooperative, as is the case in some places in Texas, where the Texas Regional Education Centers have blanketed the State.

Since both the single-purpose and the mixed-funding cooperatives are expanding their operations, they are included in the body of the study under the major cooperative classification that they most closely resemble.

FEDERAL INTEREST IN COOPERATION: LEGISLATION

Higher Education Act

In a discussion of educational cooperation, the year 1965 is a logical dividing point between basically *sub rosa* activity and open implementation of cooperative activity. In 1965 the Federal Government encouraged educational cooperation through several important pieces of legislation. The Higher Education Act (PL 89-329) encouraged cooperation between higher education and community agencies through title I, Community Service and Continuing Education, by requiring institutions of higher education to work closely with, and make their resources available to, communities for the solution of community problems.

Title III provided assistance to strengthen developing higher education institutions in several ways: (1) cooperation between a cooperating institution (bilateral); (2) consortia of developing institutions to work on common or similar problems; (3) connection of a cooperating institution with a consortium of developing institutions; and (4) other arrangements (e.g., "hidden" bilateral).

Elementary and Secondary Education Act

The Elementary and Secondary Education Act (ESEA), PL 89-10, and its amendments probably did most to encourage educational cooperation. All five original titles encouraged, or at least did not discourage, cooperation. As ESEA evolved, several programs required interagency or regional planning as a condition for funding. Title I provides funds for the im-

provement of education for disadvantaged youth through the utilization of a wide variety of nonschool social agencies and programs. Also, the guidelines of title I (as amended) indicate that a school system may apply for a grant up to 1 percent of its entitlement, or $2,000, whichever amount is greater, for planning purposes relative to expanded, more effective, or more efficient use of title I funds. (10: 2745) A number of districts could join and pool these planning funds to obtain consultant aid or a full-time planner to effect regional planning for title 1. (11)

Title III, PACE (Programs to Advance Creativity in Education), was particularly aimed at educational innovation and supplementary educational centers. Most PACE projects encourage (or demand) cooperation between and among agencies with a view toward the improvement of education. As the funding of title III has changed from the Federal to the State level, some States have used title III for statewide regional development to promote planning and educational cooperation for the utilization of title III funds (e.g., Kentucky).

Title IV provides, among other things, for the development of regional educational laboratories originally conceived to serve a regional need and foster a kind of educational cooperation.

Title V also encourages cooperation. Section 507 provides for the interchange of personnel between the U.S. Office of Education and the State education agency and other State public organizations in education. Section 505 encourages multi-State cooperation for the identification and solution of common problems. To date, 31 Section 505 projects are operating or have been operated. (12: 61-63) These title V projects have shown that States can cooperate for improvement of education.

Title V has also provided that 10 percent of State title V funds be allocated to local districts to encourage local and multi-district educational planning and to assist with administrative activity. Some States have suggested in their guidelines for the administration of this section that priority be given for funding to districts that have formed cooperative arrangements or that are planning to work cooperatively. It would have been possible under title V for a State to make funds available for the development and administration of regional education agencies.

The ESEA's recognition and influence in strengthening cooperative programs between school districts is especially evident in the definition of an eligible "local education agency" under title II, III, and V. After careful consideration, the Senate Committee on Labor and Public Welfare modified their original definition which was accepted by the House of Representatives to broaden or clarify the inclusion of cooperative organizations. The modified definition found in Section 601, (f) title VI, of PL 89-10 reads as follows.

The term "local education agency" means a public board of

education or other public authority legally constituted within a State for either administrative control and direction of, or to *perform a service function* for, public elementary and secondary schools in a city, county, township, school district, or other political subdivision of a State, or such *combination* of school districts or counties as are recognized in a State as an administrative agency for its public elementary and secondary schools. Such a term also includes any other public institution or agency having administrative control and direction of a public elementary or secondary school. (emphasis added)

The concepts of agencies which "perform a service function for" and the inclusion of "such combination of school districts or counties as are recognized" should be emphasized because of the thrust they gave to cooperative endeavors.

Other Federal Legislation

The Federal Government also provides for cooperation between education and other agencies in the Model Cities Program, in the development of area vocational and technical schools, and in the development of regional academic and/or development districts under various acts, such as the Appalachian Redevelopment Act, for example.

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PREP

No. 23-A

INTERMEDIATE EDUCATIONAL SERVICE AGENCIES

The formal incorporation of some type of multidistrict or multicounty intermediate service agency as an integral part of the State's formal education structure is a movement that has been increasing in strength since 1960. The demise of the old county office of superintendent and the growth of some form of intermediate or middle echelon organization has had tremendous impact on the States where this has occurred. During the past decade approximately 15 States have established a new unit of school government based upon a regional approach for the purpose of providing specialized programs and services for elementary and secondary schools or have reorganized existing units, usually the single county office of superintendent, for the improvement of educational delivery systems at the local school system level. Other States are currently examining this alternative through the State education agency, the State legislature, and/or executive branch of the State government.

Urbanization and the subsequent suburbanization with the inherent population shifts, and the increased demand for providing equal educational opportunity for all youngsters have placed greater responsibility upon each State educational system and the subsequent organizational structure. Even though education is constitutionally a State responsibility, in operation most of the responsibility has been placed on the local educational agency. With the increased complexity of education and the specialized services and programs increasing in number and scope, local education agencies have not been able to keep up with the demand effectively and economically. Therefore, regional approaches to delivering services to meet the specialized educational needs of youth are increasingly being required.

ORGANIZATION

Intermediate educational cooperatives are an integral part of the State system of educational administration. These agencies are legally established or permitted through State legislation and subsequently encouraged through State, Federal and local funding. In most cases the intermediate unit is below the local education agency instead of a super-structure designed to overshadow the local school district; the intermediate unit receives direction from the local education agency. The State structure in which these organizations are found is frequently described as a three echelon system consisting of the State education agency, intermediate unit, and local education system. During the formation of the emerging regional intermediate unit, the old county superintendency has either been abolished or absorbed into the new intermediate unit.

MEMBERSHIP

Membership in intermediate units consists of the local school districts which comprise them. In some States it is optional for the county to vote for inclusion, while in others it is mandated. Most States are divided into regional agencies in which all school systems are involved, although in some States certain large school systems are not permitted or required to join. In Iowa, the regional boundaries have been designed to include either a community college or area vocational school which would then become an integral part of the educational program, though not necessarily having membership.

GOVERNANCE

The traditional intermediate unit, the office of county superintendent, was either elected by popular vote or appointed by the State education agency. In some cases a policy board of elected lay citizens did not exist. More recently, the intermediate unit has consisted of a board of control elected by the people with the appointment of the executive officer. The emerging regional intermediate units vary in the manner in which the board of control is determined. In some States they are popularly elected; in other States they are elected by the school board members of the constituent districts from their own ranks; and in one State they are elected by a joint committee of the constituent school districts which is usually made up of the superintendents of the local education agencies. Situations exist where separate county school boards appoint a common administrator or superintendent who must meet separately with both boards in administering the joint unit.

It is generally recommended that the board of control be popularly elected lay citizenry with overlapping terms of office from 3 to 4 years. However, the election of a board of control by the school board members of constituent districts based upon a weighted ADM vote has merit.

The authority of the governing boards of the intermediate units is either established by law or through regulations established by the State education agency. It is recommended that, where possible, powers and responsibilities of the boards of control be established through regulations of the State education agency so that changes can be made more easily as needs arise. The literature also indicates that the board of control of intermediate units should be empowered to establish its own rules and regulations subject to State education agency and/or statutory and constitutional constraints. The board of control of the intermediate unit should, as it most frequently does, have the authority to appoint its chief administrative officer and to approve staff upon the recommendation of this officer.

SIZE AND GEOGRAPHY

Existing intermediate units have a wide range of student population depending upon the State's organization and natural geography or terrain. It is generally considered that the minimum student enrollment for any multicounty regional intermediate unit should be 10,000 pupils, with an optimum range of 50,000 to 60,000 students. However, this optimum is probably not sufficient to offer extensive computer programs and facilities economically and efficiently. One of the chief considerations in determining geographic size is the driving time from any point within the region to the center or centers that house program offerings. A common "rule of thumb" is that driving time to the centers should not exceed 1 hour for 90 nt of the area to be serviced.

Currently, intermediate units in the United States vary from single counties to multicounty organizations. However, the boundaries of the regional intermediate units may or may not be coterminous with the existing political county boundaries. This is usually determined by the strengths of the county political and administrative functions. Where the multicounty intermediate unit is not coterminous with county boundaries, the region seems to have been planned on a socioeconomic basis. Other considerations given to the formation of regional agencies are the number and kinds of local school systems involved, the financial base, trade and service areas, climate, the demand for services that would be placed upon the regional intermediate unit, and sociological community ties.

FUNCTIONS

The primary role of the intermediate unit is to offer programs and services to aid local school systems in providing equal educational opportunity for all students within the service area. The services provided by the intermediate units in the United States vary considerably. They may deal with inservice education, special education, guidance, curriculum development, vocational and adult edcuation, cooperative purchasing, educational television, electronic data processing, media, shared teachers, and libraries. Many regional intermediate units are extensively involved in planning on short- and long-range bases. These planning functions seem to be rapidly emerging and necessitate the regional intermediate unit working cooperatively with other State and Federal agencies.

Many of these intermediate units are involved in developmental programs which are designed to work out the "bugs" so that the program can be spun off as soon as the constituent districts are able to support it internally.

Whatever the types of services provided to local school districts, they are usually determined by the inability of the local district to provide the service on an economical, effective, and efficient basis itself.

It should also be pointed out that those intermediate units which do *not* have a State regulatory function operate most effectively with the local education agencies and are seen as providing services *to* and not *for* the local education agencies. Naturally, this has implications for State laws, rules and regulations.

PERSONNEL

Highly qualified and highly specialized personnel is the most striking characteristic of successful intermediate cooperative education units. The following types of specialities indicate the variety of personnel needs connected with intermediate units: (1) curriculum content, (2) legal problems, (3) team teaching, (4) flexible scheduling, (5) educational planning, (6) educational redesigning, (7) testing, (8) programed instruction (9) curriculum research, (10) research, (11) educational television, (12) child development, (13) teacher recruitment, (14) communications, and (15) general administration. One intermediate unit in Michigan employs a full-time lobbyist to work with State and Federal legislators in obtaining or influencing new legislation and possible sources of funding.

Excellent salary schedules and other fringe benefits and privileges are apparent keys to the successful recruitment of quality staff personnel. The regionalism of many intermediate units provides a "district" size large enough to allow for a high degree of specialization by extremely qualified personnel who are typically given the freedom to perform within their own specialty area. Current and projected activities of intermediate units will require personnel trained in planning, communication, media and technology, program development, evaluation, computer applications. Some intermediate units have been forced to develop their own training programs, especially in the rapidly emerging area of educational planning.

FINANCING

Intermediate units vary in their authority to levy taxes to provide funds for operational programs. Some have been deliberately limited in the amount of State funds provided for administration and program operation to force local cooperation and mutually funded programs between constituent members of the intermediate unit. It is recommended that the intermediate unit be empowered to levy taxes and have fiscal independence and integrity. Intermediate units should be eligible to receive Federal aid, other gifts, and grants for the operation of specialized services. Regional intermediate units should also be eligible to bond for the construction of facilities. Contractual arrangements between the intermediate unit and local school systems to provide services are one of the most common forms of funding and definitely indicates program commitment. Some States provide funds on a matching basis for specific programs. Title III of the Elementary and Secondary Act has been used extensively in funding operational programs at the intermediate unit level. The trend toward more planning and evaluation activities through title III of ESEA encourages continuation of this funding since the intermediate unit is one of the most logical agencies to perform these tasks.

TRENDS

Some type of intermediate unit between the local school system and the State education agency appears essential since public education is obviously involved in a period of profound change, and modern conditions will continue to dictate further change. Most recent developments have emphasized the regional concept of multidistrict cooperation with coordinative planning and supplementary service functions. Since 1965 there has been a considerable movement toward the establishment of intermediate units on a regional basis with many States considering this alternative. The advantage in this type of an agency that is most attractive to local education systems is the ability to maintain local autonomy while obtaining needed specialized services for students. A matter of prime consideration for the establishment of multicounty intermediate units is that this structure provides an opportunity to equalize the tax base at a more local level than has previously existed.

While mid-America has been the center of the force for the emergence of the regional intermediate units, the southeastern United States, which has few of these cooperative programs, has probably the most potential for their development. (The recent emergency of voluntary educational cooperatives and investigations of legislative councils, gubernatorial committees, and State education agencies into regional education service agencies in the Southeast emphasized this point.) It is obvious that the single county office of county superintendent is waning and other structures must be found to provide the services.

Regional intermediate units do indeed have a meaningful future. Many educational functions require a regional approach. This is especially true in rural areas. Those areas lacking cooperative structures can certainly learn from the experience of States and regions where achievement has been made.

SELECTED INTERMEDIATE AGENCIES

States have named their middle-echelon regional agencies differently. Examples of regional intermediate unit names in the following States are:

- Colorado: Boards of Cooperative Service (BOCS)
- Iowa: Regional Educational Service Agencies (RESA)
- Nebraska: Educational Service Units (ESU)
- New York: Boards of Cooperative Educational Services (BOCES)
- Oregon: Intermediate Education District (IED)
- Pennsylvania: Intermediate Unit (IU)
- Texas: Regional Education Service Center (RESC)
- Washington: Intermediate School District (ISD)
- Wisconsin: Cooperative Educational Service Agency (CESA)

Included in this section are summaries of four States--Iowa, New York, Texas, and Wisconsin--that have developed regional approaches to middle-echelon administrative service units. These summaries illustrate different organizational characteristics of intermediate agencies.

Iowa

The Iowa legislature in 1964 enacted legislation providing for statewide patterns of merged areas, subject to approval by the State Board of Education. Iowa approached its problems in a unique manner by conforming the regional agency development around area vocational schools and community college organization. The State board originally approved 15 "merged" areas for vocational schools or community colleges. Ten were designated for community colleges offering vocational school purposes. "Merged" area boards, consisting of five to nine members elected by popular vote, can levy taxes for operation, and the voters can levy additional taxes for facilities. Legislation also provided for the combination of two or more county intermediate districts. These combined intermediate districts would thus meet the State board policy of matching the "merged" area established for vocational schools or community colleges. Some counties have combined and others are in the process of study. (2:44)

A 16th area has been proposed under the plan for the establishment of 16 multi-county intermediate districts. These centers have been designated to receive all ESEA IV funds for regional library and materials centers and some ESEA IV funds for special education services. (Proposed legislation for the mandated establishment of these centers may be offered in 1972.) The superintendent of the Iowa State Department of Public Instruction said that the regional education service agency has top priority and will be a vehicle for changing classroom instruction through the provision of services, and that each center needs computer facilities for fiscal reporting, computer-aided instruction, and so on. Currently, there are nine combinations of at least sections of counties established in the multidistrict organizations.

To show the success of these multidistrict organizations, the superintendent of schools for the Joint County System of Cedar, Johnson, Linn, and Washington Counties indicated that the joint county system was about to introduce a cooperative buying program for the purchase of paper supplies and audiovisual equipment with the estimated saving to local districts of 15 to 25 percent. With the addition of two delivery vans to the Joint County Media Center, over 36,000 books and 25,465 films had been used by the close of the first semester as compared to 35,851 books and 25,534 films used during the entire 1967-68 school year. (21)

New York

In 1948, the New York Legislature authorized local school boards to form Boards of Cooperative Educational Services (BOCES) as a corporate body extension of local districts and subject to their control. New York established the BOCES pending the creation of intermediate districts. However, the BOCES seemed to work so effectively that the intermediate districts were never formed. (22:13) "The express purpose of the BOCES organization was to provide shared programs and services, particularly in rural areas where limited resources often restrict the depth and breadth of offerings in individual school districts." (23:1) For the most part establishment of BOCES followed the jurisdication of the district superintendency.

While in 1960 there were 84 BOCES, the number had been reduced to 53 by January 1970. (23:1) Currently, there are plans for a network of 45 BOCES, but since some of these may not be large enough geographically for certain needs, there continues to be a need for regional (multi-BOCES) sharing.

The establishment of BOCES is contingent upon a majority vote of the boards of education and school trustees of the school districts of a supervisory district. Independent school districts within the supervisory district may become members of the BOCES upon resolution of their board of education and the BOCES organization subject to the approval of the Commissioner of Education. However, once approved, these districts may not withdraw membership and must participate in *administrative* costs of operating the BOCES. In 1963, the BOCES membership was extended to all city and village districts with populations less than 125,000. (24:4)

The BOCES board consists of five to nine members elected by a majority of the school board members of the member districts. While the BOCES is a separate entity from the local school districts, it is in effect a legal extension of the local school district. The chief administrator of the BOCES is also the superintendent of a supervisory district. The number and geography of the supervisory districts are slowly being reorganized to be coterminous with the BOCES as retirements of superintendents occur. While the BOCES does not have tax levying authority, it can build and own property for vocational schools under the State Dormitory Authority. (25:12)

The BOCES are required to share services which cannot be rendered singly by the local district. These services however, should not replace currently operating sound programs. Services should be those which can meet standards to justify expenditures. Shared personnel cannot be provided to one district for more than 60 percent of their time. Shared services should not hinder reorganization efforts. Approval of shared services, including services for which there is no State aid, is for 1 year. Sparse population, distance, and other factors are considered in determining specific services. The physical facilities must be available. Teachers are subject to the same certification requirements as local district personnel and may be employed by the cooperative and school district at the same time. (26:7-8)

Each BOCES is an area public education agency created by order of the New York State Commissioner of Education on petition by local boards of education. Except for administrative costs, BOCES services are not imposed upon local districts but are the direct result of local districts' requests. Programs are supported by contract costs paid to BOCES by local districts. The BOCES receives State aid for its programs. (23)

The BOCES (1) appoint superintendents, (2) prepare budgets to operate educational programs, (3) furnish upon request part-time educational services to districts too small to employ full-time teachers, (4) make available services to supplement local staff, (5) determine needs by survey and research projects, (6) introduce new programs to fill these established needs, (7) operate vocational-technical education programs, (8) work with physically handicapped and mentally retarded children, (9) improve lines of communication, and (10) provide supervisory service responsibility to the supervisory district program. (26)

New York BOCES are not generally coterminous with the county boundary lines, but are built around basic socioeconomic units rather than political subdivisions. (22:25)

As an example of a BOCES, the first supervisory district BOCES in nothern Westchester County is composed of 13 school districts covering 250 square miles and a student population of over 40,000. While historically this BOCES began operation with shared teachers and guidance services, these efforts have been supplanted by programs and services with an annual budget in 1967-68 of $3.5 million. This BOCES provides administrative and data processing aid, inservice workshops aid in personnel selection, and liaison with the State department of education. The electronic data processing component is concerned with pupil records, attendance, payroll, scheduling, and other information tasks. Special education for children who have learning disabilities, who are mentally retarded, or who are educable mentally retarded is the largest single effort undertaken by this BOCES. Through this component a ... training ground for young teachers who wish to become special educators is provided. Over a dozen different vocational-technical education programs are offered on a centralized campus. Guidance and child study activities are based on a program of testing and counseling for students referred from local schools. Personnel services, occupational and college selection, inservice education for teachers, library science, mobile reading units, research (especially in the area of computer-aided instruction), instructional media services, psychiatric consultative service, and transportation are provided.

In addition to the BOCES concept, the New York State Department of Education has proposed 16 regional centers for educational planning and development of education and would be financed by Federal, State, and private sources. It is proposed that each center be administered by a regional council appointed by the commissioner of education and have a small permanent staff or professional and support personnel. Institutions of higher learning, post-secondary schools, school districts, libraries, and museums would be included within each center. As problems are identified, staff members of regional centers would act as catalytic and coordinative agents in the utilization of the entire resources of the region for the solution of problems. (27) (At the 1970 National Conference on Regional Educational Programs, it was suggested that this possibly is the beginning of a "four-echelon" system of State education.)

Texas

Texas established 20 Regional Education Service Centers (RESC) through the authorization of the legislature in 1965 for the establishment of State-supported regional media centers and a subsequent broadening of the definition to include provisions for a broad range of supplementary services. The Office of Planning in the Texas Education Agency had conducted an indepth study of the feasibility of providing services on a regional basis, including the relationships of title III, State department of education, higher education institutions, regional laboratories, and research and development centers. Therefore, the establishment of these education service centers became an integral part of the State education planning machinery. The major efforts of these educational service centers are to provide locally oriented bases for planning, operate regional media centers, coordinate and encourage development of title III programs, and provide additional regional services.

In determining the nature of the regional boundaries, the State board of education looked at pupil population, geographic area, educational and cultural resources, and regional designations formulated by other State agencies for the purposes of planning. Thus, the State education planning fell into concert with other statewide planning programs.

In May 1967 each RESC received $67,000 to plan and employ staff. Each LEA was asked to appoint a representative to serve on the Joint Committee for its region. Members of the Joint Committee are almost unanimously local school superintendents. The Joint Committee, then, elects lay citizens to the service center board of directors. This board of five to seven members residing in the region appoints the executive director and meets with the Joint Committee for planning purposes.

There is strong emphasis on the fact that the education service centers are not intermediate administrative units but are concerned with providing services *for* the local district and not *to* the local district. This concept is greatly aided since the centers are *protected from any regulatory functions*. There is also an extreme emphasis on comprehensive educational planning in establishing priorities, goals, and plans of action. Independently each service center listed educational personnel development as one of its greatest needs, and therefore, the State has set this as its number one priority.

Membership in a regional education service center is not mandatory. However, the school districts may choose to be represented on the Joint Committee and participate fully in planning without receiving the cooperative services. Under provisions of a statewide plan, the center can provide the following computer services: student scheduling, test scoring, grade reporting, pupil attendance, and payroll.

Each center receives Federal, State, and local funds. Federal funds are primarily through titles III and IV of ESEA. The education media operations centers are financed mainly through State and local funds. The State allowed the centers up to $1 per pupil in average daily attendance if the local district would match the State share. The dependence of Federal funds for a large portion of the financial support tends to produce an unstable situation as a result of the *uncertainty of continuous funding*. (28)

Two unique educational positions have been created as a result of the development of service centers--educational planners and educational communicators.

The educational planner is responsible for assessing educational needs and developing systems and means whereby these needs may be met in the region. There is one planner for each district, and they meet regularly with the Office of Planning of the Texas Education Agency. To train personnel for this position the Texas Education Agency contracted with General Learning Corporation to develop a training course for educational planners. Ultimately 20 planners were trained.

The training of educational planners did not end, however, with the initial 20 regional center planners. Each of these persons then was charged with the responsibility of returning to their region and conducting in the local school districts the same type of workshop. Each local school district now has an "educational planner" of some type, who works directly with the regional educational planner at regular meetings throughout the year. There is much local feedback and much local participation in the activities of the center.

The second unique position which has been created for the RESC is that of the educational communicator. The problem of how new programs and procedures were to be disseminated throughout and between regions was early identified by local and State leaders. Thus, there was created a "linker."

Wisconsin

Since 1947 Wisconsin has reduced its number of local districts from 6,000 to 570. (2:37) With the combination of many counties into a single unit and the reduction of enrollment of the public schools under the jurisdiction of county officers, the 1963-64 Wisconsin legislature established 19 Cooperative Educational Service Agencies (CESA) and abolished the county superintendent of school's office. Currently, each Wisconsin school district is a part of one of the 19 agencies with boundary lines generally not coterminous with county boundaries. (2:37)

The primary purpose of the agencies is to provide services and personnel to local districts they cannot economically and efficiently provide on their own. These are usually specialized and supportive services not commonly operational in local school systems. The agency "coordinator" is appointed by the board of control and serves as the chief administrator.

Each CESA is governed by a board of control composed of 11 members of the school boards of districts within it. Each year an annual convention is held to determine the board of control. Each LEA board appoints one of its members as its representative to the convention. No more than one member may be a member of any school board within a given union high school area. The board of control elects its own chairman, and treasurer. The agency coordinator is appointed by the board of control for a term of not more than 3 years. The policy-making body approves service contracts with school districts and county courts and determines each district's prorated share of the cost of shared service programs. The board of control has no tax levying authority, and State aid amounts to $29,000 per year (a raise to $35,000 is being considered). (29:11)

The CESA administrator's salary (minimum and maximum) is limited by law. The functions of these agencies are restricted to cooperatively planned and approved programs. By the establishment of CESA's and the elimination of the county superintendent of schools, each school system was assigned to its respective agency.

Initially, no State support was provided for services to school systems. Therefore, all financial assistance was on a contractual basis between the local school systems involved. Each local school system may choose not to participate in services provided. (30:25-26)

A professional advisory committee composed of each school district administrator in the CESA area meets at the request of the board of control or agency coordinator to provide advice. (29:12)

An agency school committee composed of lay citizenry appointed to 3-year terms by the board of control to help effect changes in school district structure and help implement plans to strengthen the administrative districts legally serves in the capacity of holding public meetings for grievances, to initiate petitions for legislative change, and to study and evaluate school district structure to determine if goals of equal and improved educational opportunities have been obtained. This committee, composed of seven residents of the territory within the agency, but limited to only one individual appointed from the territory served by each school district operating a high school, is appointed by a majority vote of the entire board of control. (29:13)

At least one CESA has recommended to the legislature that there be an increase in State administrative aid; an adoption of permissive legislation allowing the agency to employ an assistant or program consultant; an identification of those services that--because of efficiency, uniqueness, economy of frequency--can best be performed by service agencies and provide available State aid to encourage the use of such services by the service agency. (13)

Although CESA's have no jurisdiction of responsibility over school districts since the agency exists to provide, cooperatively, needed services to school districts by contract and school districts accept and pay for only those services for which they have contracted, CESA's can provide any service that a school district may provide. The CESA's also serve as liaison between the State and local districts, but they are not an arm of the department of public instruction. (32)

The major handicap in Wisconsin is the lack of taxing power and the small amount of State subsidy. (2:27)

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PREP

No. 23-B

VOLUNTARY EDUCATIONAL COOPERATIVES

As education is confronted with ever-increasing problems and the complexities involved in solving them, more and more schoolmen are becoming aware that neither they nor individual school systems can do the job alone. Leaders in the schools are turning in many different directions to obtain help. They look to universities . . . to private industry . . . to Federal and State Government . . . . Another and possibly the most effective direction in long-range terms, they turn to fellow schoolmen for resources, knowledge, and power to confront common problems. (1:2-3)

Various cooperative arrangements exist between and among schools and between schools and other organizations in society. Some arrangements have been mandated; others have developed informally--usually in response to common problems recognized by the constituents. "Voluntary educational cooperatives" include *formal* cooperation in education which *has not developed because of some mandate or legal requirement from a particular governmental level*, especially from the State level. For inclusion in this study a voluntary cooperative must have some identifiable formal and durable structure and a governing board for the cooperative arrangement. Informal, nonstructured, ad hoc, or short-term arrangements between and among schools and other agencies are not specific content for this study, although references may be made to them. For example, title III, ESEA, activities are generally excluded since in most cases they are essentially ad hoc; they conclude or change once original funding has terminated, or they may not be truly cooperative since one or two districts receive most services and other districts are involved only tangentially. Some States have regionalized for planning and developing title III projects. Whenever this occurs, the "cooperative" is no longer "voluntary," even though there may be no penalty if a local district within the title III region does not participate.

Although local school districts may cooperate with other agencies (such as a health department), unless that agency is represented on the board of control of the cooperative (either in a voting or advisory capacity), the agency is not considered a *member* of the voluntary cooperative. If, for example, a cooperative includes local schools, higher education, and the State education agency (SEA), *and* the governing board includes those units, the cooperative will be identified as composed of local schools, higher education, and the SEA. Thus, a major determinant for identification of a voluntary cooperative is the composition of the governing board; a second determinant is related to contributions (financial or in-kind) for operation of the cooperative.

U.S. DEPARTMENT OF HEALTH, EDUCATION, AND WELFARE/Office of Education
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Voluntary educational cooperatives, then, may be termed confederations of school districts and other agencies. The cooperative may fall within the definition of a local education agency in the State or States where it is located, or within the general definition of local education agency provided in Public Law 89-10, Section 601. In such cases, the voluntary cooperative can be treated in the Federal funding process just like any other local educational agency. (5:246-253)

ORIGIN

Voluntary educational cooperatives originated in a number of ways. It would seem that the most prevalent reason for the development of voluntary educational cooperatives was the identification of common needs among school districts and the recognition of some economies that could result from cooperatively working toward resolution of the needs. In some cases, the voluntary cooperative came about as a result of a title III, ESEA, project which, after losing its operational grant, was seen as worthy of support by the districts previously involved. In other cases, voluntary cooperative activity was an expansion of a school study council activity, but with a more specialized focus. Still another source of voluntary educational cooperatives was the encouragement of other social agencies. Two regional educational laboratories (the Northwest Regional Educational Laboratory and the Appalachia Educational Laboratory) have been encouraging various forms of educational cooperation, as has the Appalachian Regional Commission, for example. Other agencies concerned with equalization of educational opportunity and with strategies for improving the education of children with special learning abilities or disabilities have also encouraged the development of voluntary cooperatives.

Voluntary cooperatives seem often to be the precursors of more formal arrangements, and voluntary cooperative activities that have been identified as "successful" often give rise to formal cooperatives that are not voluntary (e.g., the Board of Cooperative Educational Services (BOCES) in New York State and the Minnesota Educational Service Agencies (MESA) in Minnesota.

MEMBERSHIP

Membership in a voluntary educational cooperative is varied. In some cases the voluntary cooperative includes only local schools. However, there is a tendency for voluntary cooperatives to recognize the need for involvement of other agencies and include some mix of local schools, higher education, representation from the State education agency, personnel from business/industry, and representation from other social agencies such as community action agencies or local economic development districts. Sometimes nonpublic schools are included in the membership; in a few cases other Federal agencies (such as an educational laboratory) are included as members. Coordination, communication, and influence of the cooperative seem to be strengthened by the inclusion of other agencies. Membership involvement in cooperatives provides one vehicle for local involvement and for private enterprise partnerships with education.

ORGANIZATION

Voluntary educational cooperatives are organized in a number of ways, but in general they follow a pattern which would be described as quasi-legal and quasi-hierarchial. They usually are not "recognized" in the traditional line of ity from the State education agency to the local district; the common structure e cooperative controlled by constituent districts, and not as a formal

hierarchial level between local school districts and the State. The cooperative comes below the separate local districts in the statewide structure for education.

GOVERNANCE

Most voluntary educational cooperatives are governed by a board of control representative of the membership. Usually this board is composed of superintendents of the constituent schools and/or elected representatives of the other agencies. In some cases the board is made up of representation from the local boards of education which participate in the voluntary cooperative. It is not unusual to have representatives from other governmental or social agencies serving in an ad hoc or ex officio capacity (sometimes voting and sometimes nonvoting on the board. Higher education is often included on the board; the SEA less often.

SIZE AND GEOGRAPHIC AREA

Although there is considerable variation in the size or geographical area covered by voluntary cooperatives, in most cases the voluntary cooperative includes school districts within an approximate 1 hour driving distance from the central point of the cooperative. The number of the "eligible" members in the cooperative would then depend upon the local structure of each area. (In an area where the county unit is the basic unit, there might be only three or four members; in an area where there are many local districts, there might be 40 or 50 members.) In a few cases, the cooperative activities span larger areas (especially where transportation facilities are excellent). One State has suggested that about 100,000 pupils is the minimum size for purposes of regional agencies.

FUNCTIONS

A review of the functions of voluntary cooperatives reveals a myriad of functions. The primary function of voluntary cooperatives seems to be to engage in those activities and to provide those services that *cannot* best be done individually by school districts at the local level. Since the financial position, size and sophistication of constituent local districts dictate the extent of the activities which can best be done locally, the scope of cooperative activities covers a wide range and varies from location to location. The most prevalent stated function of voluntary cooperatives is to provide services to youngsters; the second most frequently stated function is to engage in planning and developmental activities of mutual interest to constituent districts. In some cases there are single purpose cooperatives focusing on media, data systems or regional computer services, or on cooperative purchasing. However, no cooperative was identified that had as its major or exclusive purpose the provision of administrative services for a number of small districts, although the Supervisory Union in New England comes close to that. The Boards of Cooperative Education Services in New York State provide administrative services, but they also provide programmatic services to pupils. A legitimate function of voluntary cooperatives would seem to be to provide a centralized source for purchasing, records, payroll, transportation routing, menu planning, scheduling, and so on, purely as an administrative service that would then be translated into programs through release of time from administrative duties of educational leaders in the local districts. Project OTIS in Oregon appears closest to this function.

LEGAL ASPECTS

Voluntary cooperatives are not mandated by law or established by formal regulations. Most exist in States which have permissive legislation that allows, or does not restrict, cooperation of school districts, or in States that have no specific laws about the cooperative activities of school districts. In some States the permissive legislation facilitates school cooperation; in others, the legislation impedes it. For example, in Minnesota there are provisions whereby local schools can cooperate and develop a mechanism for taxation. Local districts in Virginia can be penalized by the aid reimbursement formula for spending local money for regional educational cooperation. Districts generally can contract between and/or among themselves for cooperative action.

PERSONNEL

Where formal boards of control for programs of cooperation exist, it is common to find a director and various associates or assistants with responsibilities for special programs run by the cooperative. The nature of the voluntary cooperative is such that some new roles in education appear to be in demand; these might be described as planners, communicators, program developers, and so on. Considerable external consultant help is used by cooperatives, and in some cases the cooperatives provide from their own staffs considerable consultant help to the constituents.

Most cooperatives employ secretarial and nonprofessional help, including technicians, drivers, media specialists, and so on.

Depending upon the State legislation, personnel that work in the cooperatives may not be covered by State retirement plans or other benefits normally available to other educators. In some cases, a single school district will employ personnel and then "loan" them to the cooperative. This technique keeps benefits intact. Without State laws to nurture and assist regional agencies, the cooperative will continue to have problems in attracting career-minded educators.

FINANCING

There are diverse methods of financing voluntary educational cooperatives. In many cases, funding for cooperatives comes from a combination of local district, State, Federal, and private funds; in other cases, the voluntary cooperative is financed by one or another of those, or by some other means. The sharing of personnel provides an in-kind support for the voluntary cooperative which can be considered part of the local contribution. Some voluntary cooperatives have the option, legally, to seek permission to levy taxes for support of their activities.

A basic funding source for voluntary cooperatives is local school district contributions (either a per-pupil or pro-rata cost based upon services rendered). Cooperatives also receive funds from other sources such as contracts or grants with State education agencies and/or the USOE, foundation support, donations and/or gifts from industry or business, and in-kind contributions from constituents or other agencies. Some cooperatives receive income from sales of publications and/or services.

The procedure for obtaining local funds varies. Some usual procedures are: an assessment per professional employee, an assessment per pupil, an assessment per pupil for specific services, and a flat fee. There are examples of voluntary cooperatives where business and industrial concerns contribute up to 50 percent of the operating budget. A less common form of financing includes an assessment per set unit of assessed valuation in the district. Some local districts in cooperatives have given up their individual prerogatives to apply for special and/or Federal programs and jointly or through the voluntary cooperative make application for these programs. This relinquishing of prerogatives is often accompanied by a sharing of personnel to initiate the activity and then the employment of some permanent staff as budgeted in the projects obtained through this process.

In the voluntary cooperatives sponsored by the Appalachia Educational Laboratory (AEL) there has been support both from the AEL and from the Appalachian Regional Commission (ARC). This ARC support, however, is short-term and must be applied for. It has taken the form of funds for planning and for development.

Local districts can each set aside a small percentage of their annual budgets to be earmarked for cooperative activities, and the pooling of this amount by each district can provide an operational base for developmental activity. This procedure is the most common and, also, the one which assures the continuation of the cooperative activity since it is not dependent upon vagaries of outside funding. This exemplifies the late Dr. Paul Mort's concept of "pool and share."

SERVICES

Voluntary cooperatives provide an array of services for their constituents. These services can be broadly classified as developmental activity, direct services to pupils, direct services to professional and nonprofessional employees, administrative assistance, inservice education for educational personnel, cooperative operation of schools for exceptional children (those that are gifted, those with physical or mental handicaps to learning, those with special vocational needs, etc.), and the operation of programs of an experimental or developmental nature. Other voluntary cooperatives also engage in some research (usually in "action" research and field studies) to help identify and remedy common problems. Long-range planning and educational communication are examples of emergent kinds of services.

SELECTED VOLUNTARY COOPERATIVES

Material in this section is chosen to demonstrate important elements and trends of voluntary cooperation in education; no attempt has been made to do an exhaustive review of cooperatives in the States represented.

Minnesota

The Educational Research and Development Councils (ERDC's) are a form of voluntary educational cooperative in the State of Minnesota. At present there are six ERDC's--the Northeast, Northwest, Central, Southwestern, Southern, and Twin Cities--providing service to the majority (but not all) of the school districts in Minnesota.

The Minnesota Joint Exercise of Powers Act allows two or more school districts to join and incorporate. The unit thus formed is empowered to spend money for anything that a single school unit could not do individually. Some units have received special legislation so that they can levy taxes. Within the geographic cooperative area of the ERDC, single purpose cooperative activities are being developed to meet specific needs. For example, within the seven-county area of the ERDC of the Twin Cities there have already been established three multi-county local district vocational units.

The ERDC of the Twin Cities services a seven-county area including 47 constituent school districts; 44 of the 47 schools within the seven-county area are members of the ERDC. The seven-county area boundary for the ERDC was set in the ERDC constitution and was determined by the organization. (29, 30, 31, 32)

The Central Minnesota Educational Research and Development Council (CMERDC) is a voluntary cooperative organization of public and nonpublic school districts and three colleges located in a 16-county area of central Minnesota. The CMERDC, governed by a board of directors and administered by an executive secretary, has 60 member schools with approximately 6,000 teachers and administrators and 112,000 students. It works to promote cooperative leadership as a vehicle for providing supplementary services, exemplary educational practices, demonstrations, and for supporting innovative educational research and developmental projects initiated by the staff of the council member schools.

Financing of the ERDC is basically the same throughout the State. For example, the CMERDC, like the ERDC of the Twin Cities, is supported by a per-pupil membership fee, an ESEA III grant, and income from services and publications.

The ease with which school districts can enter into cooperative arrangements has caused a proliferation of cooperative activities. Due to this proliferation and school district satisfaction with cooperative activities, some districts belong to several cooperatives. It has been proposed that the State be divided into 11 planning districts to be called Minnesota Educational Service Agencies (MESA). In some cases, the MESA will follow boundaries established by the ERDC's. One purpose of MESA will be to coordinate the wide variety of cooperative activities and to allow some reasonable control and direction of cooperation activities.

The MESA is, in effect, an outgrowth of local interest in and satisfaction with voluntary cooperatives. The State Education Agency is reacting to the need for coordination which has arisen from local grass roots interest in cooperating and, as such, is not (strictly speaking) imposing a structure upon local districts. The MESA will serve many of the same functions that the new intermediate unit serves in other States.

Minnesota also provides an example of a voluntary educational cooperative that was developed as a result of local interest in continuing a program initiated under an ESEA title III operational grant. After the operational grant terminated local school districts in a 10-county area voted to support the Edu-cultural Service Center, the former title III project, with an annual membership fee plus an assessment of 50 cents per pupil. Activities were scaled down to fit the new budget but the cooperative effort provide the impetus for continuation of some elements of the projects.

Connecticut

Several voluntary educational cooperative activities exist in Connecticut. One of these, the Area Cooperative Educational Service (ACES), has as its main stated purpose:

> . . . to secure and to share resources for providing educational services which can be provided more effectively and efficiently on a voluntary cooperative area basis than by educational units operating individually. (33:1)

Membership is open to any school district within a predetermined area. Following the voluntary cooperative pattern, ACES is not a hierarchial level in the State education agency, but is an organization controlled by and responsible to its constituent members. The ACES is governed by a nine-member executive committee. The nine members, whose 3-year terms are overlapping, serve as the governing body for regular operations of the cooperative.

An institution or school district is accepted into membership of the cooperative by action of the governing board and pays a membership fee as annually voted by the membership. For 1970-71 the fee was $2 per professional staff member of the member institution.

The cooperative studies problems of concern to some or all members and reviews their feasibility for area projects. It prepares proposals and seeks sources to secure the necessary funding for projects. The cooperative also establishes and operates programs and services approved by the governing body and/or the membership as well as providing communication and access to a variety of resources. Major programs and/or components for this cooperative in 1970-71 are: a communications center, a media center (similar to regional instructional materials center), inservice training programs, a service center for such activities as cooperative purchasing and student-teacher placement, and the writing of Federal proposals. Direct services to children include innovative or experimental programs in special education for gifted students or for children with learning disabilities and specially equipped transportation facilities. (33: 1,2)

School study councils have sometimes formed the basis for the development of regional title III centers as well as for voluntary cooperation outside the study council structure. An example of such an operation is the Capital Region Education Council, a voluntary organization composed of representatives of boards of education from throughout the greater Hartford, Connecticut, area (34). The council obtains funds from local, State, Federal, and private sources. It provides services under the direction of a board of directors composed of nine local board of education members elected from the 28 local boards of education represented in the council. A major project of the council is METRO, a metropolitan effort toward regional equal educational opportunity, funded under title III of the ESEA. (35) The compatible operation of a school study council type organization and of a regional title III project demonstrates that cooperative activities tend to compliment one another in education.

Northwest Connecticut has a regional service agency entitled the Regional School Service Center. The regional school board, with a superintendent as its executive agent, serves a special function for all the boards of education as the regional school service center. This function of the regional board is distinct from the one it serves as the policy-making body for the regional high school. The service center is seen as a new district; it serves the special needs of six local districts as well as the regional district in charge of the high school. While this organization is unique in Connecticut, it is similar to the intermediate school district since it services a group of towns. This organization was established by permissive legislation. A separate, regional school boards shared-service staff is provided in the area of psychological services, art, music, French, and physical education. (34)

Tennessee

The Little Tennessee Valley Educational Cooperative, currently being formed in southeastern Tennessee, will include three county school systems and four city school systems within the three counties. The board of control will be composed of seven school board members elected from each system and three county court representatives elected by each county to represent fiscal agents when local monies are required. The organization includes a planning commission made up of superintendents, county court members, city council members, State department of education representative, higher education representatives, Appalachian Economic Development District representative, and ad hoc representatives from local, State, and Federal agencies. Planning is underway for a tri-county, "perimeter" high school, cooperative vocational programs, and cooperative special education projects. Planning for this cooperative resulted from a massive tri-county educational "charrette," a planning and involvement mechanism by which citizens, professional consultants, and government officials and planners identify problems and develop alternative solutions for implementation.

The Tennessee Appalachia Educational Cooperative (TAEC) has four major program thrusts--inservice education, driver education, vocational activity, and psychological services--besides administration, planning, and developmental activity. During the 1969-70 school year, TAEC provided direct inservice training to 100 administrators and over 400 teachers and 50 paraprofessionals. Other projects included a psychological services internship center, a VIEW script program, a driver education project, and pupil exchange for vocational education that served over 9,300 pupils in 1969-70. Under development are an environmental education program, a quasi-laser beam telecommunications delivery system, and initial planning for a media center.

Missouri

The Cooperation School Districts of the St. Louis Suburban Area is a voluntary cooperation of 29 school districts. One of the oldest cooperative activities identified in this study, this organization began in 1928. The organization is highly structured with a formal committee system and a governing executive committee composed of member superintendents and board members. The organization has both standing and ad hoc committee which direct its operations. By far the largest proportion of the cooperative budget supports the communications components

which include audiovisual activities and educational television, and maintains the audiovisual center. While its major focus relates to audiovisual services and educational television, the organization does engage in various other activities. Over the years it has received grants for conducting research activities and for engaging in developmental work, such as a title III ESEA grant for improvement of social studies curriculums.

One interesting thrust of this cooperative pertains to legislation and legal activities. Besides communicating with area legislators, the committee keeps files of background data on matters of legislative importance as well as retaining an attorney to advise on matters requiring legal opinions and for filing briefs when necessary. (The professional and intense legal interest of this cooperative is noteworthy since few other examples of such strong organized interest in legal and legislative affairs could be found in the study of voluntary educational cooperation.) The organization also works with the juvenile courts to improve communications between the courts and schools to assist youngsters in trouble.

Oregon

Oregon has formal cooperatives in the Intermediate Education Districts (IED). Housed within the Lane County IED is the Oregon Total Information System (OTIS), a statewide voluntary cooperative. OTIS began in 1968 with a grant from title III, ESEA. Federal support has been phased out as the local districts have begun to provide funds based upon student population and services rendered with a minimum fee of $1.10 and maximum fee of $8.79 per pupil in ADM.

OTIS is a statewide system providing business services, student services and school scheduling services to constituents. The staff also provides field services and communication services. Through a network of terminals, member districts have immediate access to the system.

By 1970, OTIS had grown to 45 members from the 28 charter members. Services were varied, but primarily were data processing and computer activities. Some inservice programs, publications, development, and other services were provided.

By pooling resources in a cooperative computer system, local schools that singly could not offer (or make reasonable use of) the equipment and services have the benefits of a highly sophisticated and complex information processing system.

Ohio

One example of voluntary educational cooperation among private schools is the Cleveland Council of Independent Schools (CCIS) in Ohio. (37) The CCIS, an incorporated nonprofit organization governed by a board of trustees, presently includes four independent schools.

During its initial years of operation, CCIS's primary emphasis has been on curriculum and student activities. A business manager attempts to coordinate business and fiscal activities of the independent schools to provide more economic and efficient administrative procedures. The business manager acts as coordinator of business operations, including such things as general accounting,

payroll and benefits, purchasing, maintenance, and insurance. Also, CCIS is considering ways to share mobile facilities and other major equipment required to maintain the independent schools' operations.

This organization, quite new to the field of formal cooperation, should provide the economies which independent schools are looking for as well as expanded services, including teacher workshops, library and audiovisual catalogs, and interschool activities.

Georgia 1/

By 1970 Georgia had eight shared services projects in operation which included 51 school districts, 258 schools, over 5,000 teachers, and served approximately 151,000 pupils. The shared services projects include four to seven local school districts.

The shared services projects are not federally funded; they are supported jointly by the State and by participating school districts. The major stated purpose of the projects is to enable rural counties of Georgia to offer quality education while still retaining local control of schools.

The educational shared services center operation is controlled by a board of directors composed of the superintendents of the constituent school districts. The shared services center receives support from the counties in two ways: (1) each county assigns a position or a teacher to the center and (2) each county contributes cash based on the number of classroom teachers in the county. The shared services center coordinates the sharing of teachers (or positions) already allotted to member districts. Each local system, in essence, exchanges full-time service of one professional (such as a librarian or counselor) who would normally not be used full-time in the classroom for the services of the spectrum of professional consultants thus "pooled" in the service center.

These shared services projects provide four basic kinds of services to schools: (1) direct subject-area services to pupils and teachers; (2) inservice programs to groups of teachers; (3) individual consultation as requested by administrators and instructors; and (4) assistance to the superintendent and his staff in planning and developing educational programs.

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PREP No. 23-C

SCHOOL STUDY OR DEVELOPMENT COUNCILS

A school study council may be defined as a group of local school systems working together, usually under the sponsorship of an institution of higher education, for the purpose of solving defined educational problems existing in member schools. It is typically a loose confederation with totally voluntary membership. (School study councils are often known also as school development councils.)

There are presently 81 councils across the Nation. Some councils encompass very large geographic areas; others are more restricted. The Associated Public School System, for example, includes school systems across the entire Nation; the Western New York School Study Council has members in one region of a State; the New England School Development Council has member schools in the six New England States; the Public Schools for Cooperative Research includes only certain schools in the eastern portion of Tennessee.

Councils vary in size from less than 10 members to more than 30. A mixed population area--i.e., urban-suburban-rural--predominates as a setting for the council, and more than half of the councils serve a combination of school districts whose student population is in excess of 150,000. Active councils are reported in 31 States.

ORGANIZATIONAL STRUCTURE

Council activities are planned and controlled in nearly all instances by governing boards or executive committees, composed in large part of superintendents or their representatives from member school districts. Governing board members serve for various periods of time, ranging from 1 to 7 years; 3-year terms are the most common.

Boards have the responsibility for approving the employment of personnel and the preparation of budgets. (2:57) The governing boards were found to consist of an average of six members, most of whom were practicing school superintendents. (4:2) Although governing boards are composed primarily of superintendents, many council activities are designed for teachers and other nonadministrative educational personnel. There appears to be a need for teachers, school board members, and other segments of the educational community to participate, through

membership on governing boards, in the planning of these activities. Without the active involvement of these individuals, resistance to council programs could develop.

The number of members on the governing boards ranges from two to 27. At the ends of the scale only two councils report fewer than four board members while three councils indicated having more than 22 board members. (2)

The governing board normally employs an executive director who most often is a part-time employee of the council, holding this position concurrent with a position as a faculty member in a college of education. There appears to be little positive relationship between the number of member school districts, the rate of growth, and whether the director is employed either part- or full-time. Successful councils do reveal a low director turnover.

Few councils designate any specific educational requirements for their chief administrative position. The exceptions are councils employing full time directors. Because of the professional skill and leadership called for, it seems that there should be a minimum requirement of a master's degree with substantial experience at the supervisory level. A doctoral degree in education would probably be preferable, since the position involves the design of research and complex inservice education programs.

The typical staff of a council, in addition to the executive directors, is composed of a secretary, consultants, and graduate assistants. (10) Larger councils employ additional full-time professional personnel to assist the executive director. (7:10) In most cases, the executive director is employed part-time by the council and part-time by the sponsoring college or university. (4; 2; 8)

The graduate assistants are frequently doctoral students enrolled in educational administration and supervision. Their duties include assisting with the preparation of reports and serving as secretaries to council subcommittees. (9) Consultants are drawn from the sponsoring institution as well as institutions and organizations outside the council service area. These individuals, usually employed on a short-term contract basis, conduct special studies and inservice education programs. (3)

There are few legal requirements for school study councils. Many operate as nonprofit corporations and of course must meet State requirements for such corporations. Others have not formalized their operation in this manner and thus are restricted only by State laws which determine the ways in which local school districts may expend monies.

Approximately one-half of the councils are incorporated. Several others indicate that they are considering this step. Because of the contingent liability facing staff members, should injury occur, it would seem highly desirable for all councils to incorporate.

SPONSORING INSTITUTIONS

It is customary for councils to be initiated and sponsored by institutions of higher education. (7: 1; 2; 8) Councils sponsored by privately supported institutions appeared slightly larger and more stable than councils sponsored by publicly supported institutions. Colleges and universities provide this sponsorship as a means of fulfilling their public service mission and a way for faculties to use more effectively the research facilities of school systems. (3:258) Councils provide a unique vehicle to bring together able persons from the institutions and school systems for the study of educational problems. (10:29)

Sponsorship by an institution has several forms. Some colleges and universities support the entire cost of council operation. Others contribute the cost of a faculty member to work part-time in a council leadership position. (7:110) Still other manifestations of this sponsorship are the provision of office space and equipment and the support of graduate assistantships and internships. (11:21;2)

Most council executive directors have joint teaching appointments with the sponsoring institutions. This practice appears to improve the council's relationship with the institutions. It also seems to enable the director to better evaluate the faculty resources of the institution. Teaching responsibilities, however, should not be so burdensome as to prevent the director from performing his council duties.

FINANCIAL RESOURCES

Councils receive income from two principal sources: the member school districts and the sponsoring institutions. (12:53) Secondary sources of income are government grants and publication sales. (13: 22)

The member school districts are usually assessed membership fees based on factors such as the student population or the assessed value of property of the district. (3) The sponsoring institutions contribute both cash and goods and services to councils. (13:20)

Several recommendations have been made regarding how to increase the councils' incomes. Enlarging the size of the geographic area served would increase the potential membership fees. (9:6) Expanding the number of publications offered for sale is another means of increasing revenues. (14:172)

SIZE AND GEOGRAPHIC AREA

The multicounty region is the most frequently reported service area. More than one-half of the councils reported several counties as the geographic area they serve. One-fourth of the councils reported serving one State and a small number of councils (3.9 percent) reported serving several States. Isolated councils mentioned single cities or suburban areas. (2).

TYPES OF POPULATION SERVED

The mixed population area (urban-suburban-rural) predominates as a setting for councils. The urban-rural combination was reported next in degree of frequency. Exclusively urban populations were reported by only a very few of the councils. Even though a number of the councils have headquarters in central cities, their member school districts seem to be located in the surrounding suburban communities. A reason for this arrangement may be that the suburban school districts frequently have greater ability to pay for council membership. (2)

More than one-half of the councils serve a combination of school districts whose student population is in excess of 150,000. Less than 15 percent of the councils serve school districts making up a total student population of less than 30,000. (2)

ACTIVITIES

The three most important activities of study councils are inservice training, cooperative research, and the sharing of information. (2; 15; 16; 17) Another frequent activity is the sharing of such facilities as film libraries, vocational education, and data processing equipment.

In a study which ranked activities according to importance, inservice education ranked first. Dissemination and developmental activity ranked second and third respectively in importance. (2: 85 et seq.) The high priority assigned to inservice education by Seiple, Garber, and Danenburg attest to its importance as a council activity. (2; 15; 16; 17) Councils perceived they were most effective in the area of inservice education, dissemination, and gathering information; least effective in research, diffusion, and evaluation. (2:86)

Some system of evaluation of activities is used by most councils. Babel points out that a "planned evaluation process" is a characteristic activity of "successful" councils. (11) Evaluation conducted by a single council staff member is the process most often used. Evaluation by the recipient of the service is employed by some councils. Other evaluation systems include the use of outside consultants; title III, ESEA, personnel; and staff members of State departments of education. There is no evidence of the use of "cost effectiveness" models for evaluation purposes; rather, subjective evaluation seems to be the norm. (2:93)

The scope of activities is broadened considerably when councils cosponsor these activities with other agencies or institutions. Illustrative of cosponsored activities are conferences, workshops, and institutes for administrators, teachers, and nonprofessional school personnel. Cosponsors include professional associations, college departments, State departments of education, and Federal agencies. Several typical cosponsored activities reported by the respondent councils are listed in figure 2.

Activity	Cosponsor
School Community Relations Seminar	Another Study Council
Workshop for Custodial Staff	Title I, Higher Education Act
Workshop for Federal Projects Coordinators	Title I, Higher Education Act
Cooperative Curriculum	Another Study Council
Environmental Studies	4-H Club
Computer-Based Resource Unit Development	University
Individualization Model	Teacher Education Research Center
Induction of Teachers Model	Teacher Education Research Center
Two-Day Seminar with General Education Commission	State Code Commission
Vandalism Conference	Building and Grounds Division, State Department of Education
Religious Education	Council of Religious Studies
Language Arts Conference	University
A Call to Action--Urban Education	University
Data Systems Workshop	State Association for Educational Data Systems
Reading Improvement Conference	City School System
Regional Health--Sex Education Conference	State Department of Education
School Law Conference	University
School Finance Workshop	School Business Officials Association
Economic Seminar	College
Evaluation Seminar	State Department of Education
TV Education Seminar	Public School
Series of Administrative Inservice Workshops	School Management Institute
Art Conference	College
Music Institute	University
Mathematics Conference	Department of Math, University
Secretarial Conference	State Association of School Secretaries
Student Involvement Conference	State Department of Education
Elementary Principals Conference	Elementary Principals Association
Secondary Principals Conference	Secondary Principals Association
English Education Workshops	English Education Department of University
Salary Seminar	School Administrators Association

Figure 2.--Typical council cosponsored activities

Most school study councils devote some central office energies to the preparation of publications for members. House organs are an important means of keeping members aware of best practices by schools within the councils, future programs and meeting dates of study groups, and reports on studies of general interest. "Successful" councils devoted much attention to written reports as a means of communicating with member schools. (8) A second major category of publications consists of the reports of research and conferences. These publications are usually made available without cost to council members and sold to educators outside the council.

NATIONAL SCHOOL DEVELOPMENT COUNCIL

The National School Development Council, formed in 1968 and incorporated in Massachusetts, has as its prime purpose to provide a mechanism for the initiation of cooperative projects between and among study councils throughout the central States. Other purposes include management services and talent resources for workshops, inservice education, and conferences and the encouragement and coordination of research, dissemination, and diffusion.

Governance is by an executive committee of 12 members, at least one member from each of the four major national subdivisions. An executive secretary is elected from among this group to generally give leadership and direction to executive committee action and to the membership at large. The regular annual meeting is held preceding or during the convention of the American Association of School Administrators. Correspondence to the Council should be addressed to Dr. John Kohl, Executive Secretary, Pennsylvania State University, University Park, Pennsylvania.

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IPRIP

No. 23-D

INDUSTRY/EDUCATION COOPERATIVES

Interest in the nature and status of cooperative endeavors between business/industry and education is becoming increasingly widespread among educators and industrial leaders. Educators realize that the job of educating America's youth is not the sacred domain of the schools; other facets of the community cannot be ignored. Business, industry, and labor are becoming more conscious of their social responsibilities triggered in part by the Nation's recently declared war on poverty and environmental pollution, invariably leading to involvement in some type of educational endeavors.

Weatherby et al. attempted to distinguish between the older and newer education companies that are involved in education. The older companies are represented by textbook publishers, manufacturers of standard equipment, educational film producers, and text publishers. The newer business/education enterprises tend to be research and development companies, management consulting firms, materials developers, new technology and equipment producers, and suppliers of specialized services to schools. (1) Some of the giants of American industry entering the education marketplace as competitors include Westinghouse, IBM, Xerox, Sylvania, Cowles, RCA, 3M, Time-Life, McGraw-Hill, Litton Industries, Raytheon, The New York Times, and CBS. (2:113)

During the 1960's the schools were provided with a myriad of activities and services by business and industry which demonstrated their capabilities for improving the schools and for making education more relevant to the world of work. Where school people welcomed, encouraged, and helped to guide industry's involvement, the schools benefitted immensely. Those educators who were unfamiliar or fearful of industry's involvement failed to utilize industry's resources for the school's benefit. (4:1)

The recent trends toward more school accountability, responsibility, and the involvement of various publics in the school affairs and the decision-making processes have led many school systems to actively seek involvement of industry and other community groups in all aspects of the school's operations.

Information about industry/education cooperative programs has generally been reported and disseminated to other industry groups by the U.S. Chamber of Commerce the National Association of Manufacturers, the National Industrial Conference

Board, the Urban Coalition, national unions/industrial trade associations and the National Association for Industry/Education Cooperation. Only the last organization has made this program its primary task. (4:2) The American Vocational Association devotes space in its monthly magazines to case study reports of industry/education cooperatives.

Features of Existing Cooperatives

A review of the literature and three recently released related studies suggest that industry/education cooperatives may be generally classified in one of three ways: (1) *industry to school*, i.e., adopt-a-school or perform a specific job-training program with a total school system; (2) *industry/education councils* usually operating on a regional basis with orientation primarily toward business and industries but with assistance to schools where possible; and (3) *educational councils or research centers* usually operating on a multi-school system basis but receiving financial support from both industry and education. Studies and their findings are summarized below.

Weatherby Allen, and Blackner Study

Weatherby et al. identified six different and emerging types of business/education partnerships--(1)consortiums involving a school system and a university-based semiprivate organization, (2) cooperation involving an industry and a school or schools, (3) consortium between a school system and several businesses, (4) industry/education consultative arrangements, (5) industry/education performance contracts, and (6) industry/education regional councils. (1)

Sovde Study

Sovde reported the existence of five major kinds of cooperative endeavors engaged in by industry and education. Sovde's classifications, similar to Weatherby's, are (1) the Industry Education Council, (2) the "adopt-a-school" program, (3) specific consultative assistance in specific areas needed by the schools, (4) the nonschool concept, and (5) the businessmen's point of view management. The first three categories which relate specifically to schools are described below:

Industry/Education Council--The development of industry/education councils at the regional and sometimes national level is seen as an effective vehicle to facilitate communications between industry, education, and the community to improve the efforts of public education. One such council--the Northern California Industry/Education Council--has as its goals to provide a structure to bring the community together, to make education relevant and meaningful, to provide incentives for youth, and to make education and the educational processes a more constructive force in our society.

The councils provide a structure whereby leaders from both education and industry can meet together to discuss problems, share resources, and create programs of general and specific values. Such programs may result in conferences, symposiums, seminars, and so on, and may involve any number of individuals and groups from within as well as outside the community. Benefits from these programs frequently result in specific programs for improvements within the schools.

These councils are usually nonprofit organizations. Control can be a board and/or executive committee. Finances come primarily from membership, educational institutions and industry, donations and grants by industry and foundations, and conference registration receipts.

Adopt-A-School--The major objectives of the "adopt-a-school" program are (1) to build bridges between schools and the world of work, (2) to develop positive individual concepts by helping youngsters realize that they have the potential for gainful employment, (3) to encourage post high school and college training, and (4) to help students gain an understanding of the relationship between what they do in school and how it directly affects what they may do in the complex business world.

Several Detroit firms are pioneering in this type of partnership in education. Two examples are the Michigan Bell Telephone Company and the Chrysler Corporation. The Institute for Educational Development has reported 33 partnerships involving 32 schools in 23 cities in the United States.

Guidelines developed by the "adopt-a-school" program suggest that cooperatives have a better chance of success if (1) the initiative is left to the professional educators, (2) the entire professional staff of the schools is involved in planning and idea formation, (3) orientation programs are provided to orient business people to the needs, problems, and nature of the educational system and to orient educators to the resources and possible assistance available through industry. Considerable care should be taken concerning any publicity about industry/education cooperatives efforts. Good programs can be ruined if trust and positive relationships do not exist between the two groups or if one group thinks the other is trying to make some type gain (e.g., political) from their efforts. (4:6-8)

Specific Consultative Assistance--Another type of industry/education cooperation involves the performance of specific tasks by industry and its personnel for education because of some special competence and expertise which they have. These services may range from a brief telephone call for advice to short periods of full-time involvement of the industry personnel with some specific task for the local school system.

Examples of this third type of cooperation have been reported by the New Haven, Conn., School System. Their efforts involved the Olin-Winchester Company and the Southern New England Telephone Company (SNET) for improved management of the school system. The school superintendent was the initiator for such collaboration. Implementation of recommendations was left to the school system and not to industry's consultants.

The New Haven school/industry programs have focused on (1) systems analysis and organizations, (2) business office supervision and customer relations, and (3) (3) community and public relations.

Other types of cooperation between industry and education have been related to (1) industry/education performance contracting (e.g., the Texarkana Project) and (2) the conducting of studies related to the improvement of administrative, office, and business practices and procedures. Most of these latter type studies, however, have seemingly been initiated by top level business executives or groups in State government. Criticisms generally conclude that (1) the survey or task force members spent too little time in the schools and/or the community to understand their

problems and how they related to each other and (2) the studies might be more effective if conducted on a local basis whereby followup programs for improvements might result under more conducive and positive conditions.

Banta and Towne Study

Banta and Towne, in an extensive nationwide interpretive study to identify and describe job-oriented education programs for the disadvantaged jointly sponsored by private industry and the schools, identified 66 such programs operating in 22 States. These programs operated on an industry to a single, multischool, or a school system basis. (5)

Banta and Towne's classification of identified cooperatives related to job-oriented education programs are: contract construction (building trades), manufacturers, transportation, communications, electric, gas, sanitary services, wholesale and retail trade, finances, insurance, and real estate, miscellaneous business, automotive and sponsors of school organizations. (5:v-25)

Most training programs for the disadvantaged are located in the Nation's largest cities with 50 percent of the exemplary programs surveyed being located in cities with populations of 500,000 or more. Only 7 percent of the exemplary programs were found in towns of 50,000 or less. (5:v-4)

The cooperative, job-oriented education program for the disadvantaged is usually aimed at one or more of the following groups: (1) disadvantaged in-school youth (including potential dropouts), (2) school dropouts, (3) the hard-core unemployed, (4) present company employees, and (5) prospective company employees. (5:v-23)

Fifty-three percent of the programs reported were at the secondary school levels; 18 percent at the basic adult education level; 12 percent at the post secondary level; 8 percent at the university level; 5 percent at the junior college level; and 4 percent at the elementary level. Twenty-two percent reported involvement with a single school, 17 percent with more than one school, and 13 percent with an entire school system. (5:v-24)

Of those industry/education cooperatives that involved other agencies, 36 percent were with State employment agencies, 16 percent with the National Alliance of Businessmen, 13 percent with the Urban League, 13 percent with local welfare agencies, 11 percent with a Federal antipoverty agency, 4 percent with the Urban Coalition, and 7 percent listed other groups such as unions, chambers of commerce, or an employer's association. (5: v-24)

Financial costs to companies ranged from 0-$3,000 per person involved, with the average cost being $655. Those reporting no cost did not equate their paying of trainees for work as real costs. (5:v-32)

Douglass selected 15 exemplary programs identified in the Banta-Towne study for case study descriptions and to illustrate exemplary industry-education cooperative efforts. Each of the programs was aimed at one or more target audiences and target populations. Several approaches to training were found to exist.

> Of the six categories of target population, *disadvantaged inschool youth* (including potential dropouts) were served by such different approaches as curriculum planning assistance, industry visitation, school adoption, and work experiences (and/or job training) and education. *School dropouts* were served by a vocational guidance approach and by work experience and education. *The hard-core unemployed* category included two program types: job training and education, and job training with general orientation training. *Company employees* were trained by four approaches: diploma-oriented academic work, basic education, retraining, and upgrade training. *Prospective* employees were served by means of job fares, preemployment remedial education, and skills training. And *school counselors* were served by means of vocational guidance institutes. (6:ii)

An important and continuing source of information for the reader about a wide range of cooperative endeavors to solve public problems is provided in digest form by the *Action Report*, a quarterly publication of the Chase Manhattan Bank of New York.

SELECTED EDUCATION/INDUSTRY COOPERATIVES

The Educational Research Council of America (10:11)

The Educational Research Council of America (ERC), located in Cleveland, Ohio, is an independent, nonprofit, research and development center for elementary and secondary education. It was formed in 1959 by seven school systems and a number of interested industries in the greater Cleveland area. Its major purpose is the improvement of elementary and secondary education. Particular emphasis in most of its programs is placed on education for the terminal student at the secondary level.

Four major cooperating groups made up the ERC as of January 1970: a full-time professional and technical staff, including research and development specialists in subject areas and pedagogy; a corps of exemplary scholars who serve as consultants; a board of trustees consisting of civic and business leaders; and 24 participating school districts.

The major thrust of ERC is curriculum development; most all other activities are closely related to curriculum development. Although ERC conducts inservice education and research, the thrust or focus of both activities is on an improved curriculum. Also, although ERC has media and publication units, these are primarily concerned with the production of curriculum materials. The organization uses consultant services and provides consultant services to local districts. The ERC engages in a great deal of inservice education, both 1-day activities and 3- to 5- day workshop. Sessions are held at the ERC or in local districts.

Participating schools serve largely as laboratories for field testing or programs under development. However, they receive many benefits and services from ERC as a result. These services include consultant assistance, produced materials at or near cost, inservice education, and other types of teacher training assistance.

The ERC provides a wide range of programs and services involving most of the c subject areas. Program components or departments of ERC in which work is r development and through which services are available to participating school

districts include the social sciences, humanities, reading/language arts, child psychology, mathematics, natural sciences, occupational education, health and physical education, French, evaluation and testing, urban education, administrative studies and consultation, inservice education, multimedia center, and data processing. Other services include pupil projection, school building, surveys, school district surveys, and surveys of school business practices.

ERC's research and development activities are fostered mainly through the cooperative efforts of professional educators, college specialists, participating school staffs, civic and business leaders, and its own staff.

Schools served by ERC enroll approximately 250,000 pupils. Participants of ERC are located in several States, but primarily are suburban Cleveland schools. A crucial element of ERC is the intense commitment of the superintendents, who devote much energy and time to the organization.

Although the organization has been primarily concerned with suburban school problems, it is in the process of expending some efforts on inter-city problems.

ERC has received national acclaim for the development of its Greater Cleveland Mathematics Program, published by Science Research Associates. ERC's Annual Report (1969) shows that the following three new programs are under contract by publishers: the ERC Physical Education Program (publisher, Charles E. Merrill); the Social Science Program (publisher, Allyn and Bacon); and a Life Science Program (publisher, Houghton-Mifflin).

The organization receives its funds primarily from donations from industries, individuals, foundations, and membership fees from participating schools. The ERC has undertaken two contracts with the State education agency and is contemplating the possibility of moving into some areas of Federal funding. Another source of revenue is royalties and fees paid ERC for its materials. The ERC make modest charges for registration for member districts as they participate in workshops and other activities. Also, if ERC staff travels far to provide service for a participating district, there is a charge for travel and lodging. However, most services are covered by participation fees.

The fee for a participating district is $6,000 plus a fraction of 1 percent (6/10 of 1 percent in 1970-71) of its operating budget minus capital outlay and transportation expenses. Present membership includes 25 school systems, two of them parochial. No institutions of higher education are directly connected with the council.

The Greater Wilmington Development Council

In 1960, the mayor of Wilmington, Delaware, called together a group of influential and prominent citizens and business and industrial leaders in an attempt to interest them in applying their skills, talents and other resources toward helping solve some of Wilmington's urban problems. This meeting resulted in the formation of the Greater Wilmington Development Council (GWDC) which was incorporated as a nonprofit organization under the State laws of Delaware. The broad and general purposes of the GWDC were (1) to seek solutions to Wilmington's urban problems, (2) to promote programs that would enhance or improve the environment and other physical development of the area, and (3) to promote better human development.

Governance of the GWDC is by a board of directors elected from the general membership. Membership is open to anyone who desires and makes a financial contribution to the GWDC. One-third of the 66 board of directors are elected each year to a 3-year term. The board, in turn, elects an executive committee from among its members to work closely with the regular staff to oversee various GWDC operations. The executive committee meets monthly, and the full board of electors meets quarterly.

Many board members and other citizens serve on standing committees, which are working committees charged with performing certain tasks, sometimes with or without staff and/or consultative assistance.

The GWDC professional staff consists of only three members--an executive vice president, an educational director, and an administrative director. Most of the work is done through consultants on a contractual basis. The consultants come from business, industry, and/or education.

The GWDC works with education, governmental and public agencies, and local businesses and industries in an effort to reach its objectives. Originally, the GWDC's target area for providing assistance involved only the school systems, businesses, industries, and governmental and other public agencies primarily located in the greater Wilmington area or Newcastle County. Recent thrusts, however, include the entire State in a much broader effort to deal with educational and social problems on a statewide basis with business and industry involvement.

Some of the programs in which the GWDC is involved include: (1) financial assistance for needy students who want to attend college, (2) an internship program for college students (usually having backgrounds in planning and the social sciences) to work in various city and county government agencies, and (3) consultative assistance to governmental agencies, education, and business in areas of administration, organization, planning, urban development and renewal and urban problems, job training programs, and management studies.

Two spin-off cooperatives that grew out of GWDC's efforts, and are now operationally independent, are the Housing Corporation to build homes for low and moderate income families and a corporation dedicated to the development of downtown Wilmington. GWDC is now in the process of stimulating interest in and the development of a statewide educational research and development council.

Eighty percent of the operational funds for the GWDC come from private industry and foundations located mostly in or near the Wilmington area. The remaining 20 percent come from contributions by individual citizens.

Major personnel problems as identified by the GWDC's chief executive officer are locating (1) consultants or personnel that have expertise and understandings necessary to design programs to solve urban problems, as well as designing programs to train the hard-core unemployed, and (2) program evaluators. Another need identified was the necessity to find ways to improve communications between corporate executives, GWDC's board of directors, and educators.

The Institute for Educational Research (IER)

The Institute for Educational Research (IER) formally began its operations on February 13, 1964, as the result of 15 school districts coming together and deciding that they could use research to improve their educational programs and increase their effectiveness. Currently, membership involves 33 school districts, both public and private. IER is located at Downers Grove, Ill.

IER is an incorporated, nonprofit educational organization whose purposes are:

1. To conduct research and development studies for school districts and independent schools on problems of concern to them.

2. To assist school district superintendents to determine ways in which research and evaluation will assist them most in improving the effectiveness of the districts.

3. To provide evaluation services for school districts to aid in decision-making regarding educational programs.

4. To provide consultant help to the central administration of districts.

5. To search for existing research which may be of use to a school district in decisionmaking.

6. To disseminate research and evaluation findings in such a manner as to be of practical use to school districts.

7. To develop educational resources (materials, programs, equipment and inservice training) in response to needs of school districts.

Governance of IER is by an 11-member executive committee whose members serve for 3 years. The executive committee elects a board of trustees composed of businessmen and school board members who also serve for 3-year terms. Superintendents of each member district are members of the representative councils which meet at least twice yearly. The representative council elects 8 of the 11 executive committee members. The president and secretary of the board of trustees and the executive director represent the remaining three members of the executive committee.

The representative council determines major research directions and approves major projects. However, the IER, for the most part, concentrates on decision-oriented research because of its mission to aid school districts. It also evaluates and utilizes previous research--both basic and applied--in its efforts to answer various school districts' questions.

Some of the activities sponsored or cosponsored by IER include inservice training programs for teachers and potential researchers, a research internship program, and seminars and conferences of interest to member school districts.

Other activities engaged in by the IER during the 1969 fiscal year include research projects related to (1) the improvement of early learning abilities,

(2) the effectiveness of motor-training programs, (3) reading, writing, and speech, (4) language arts study, (5) speech improvement program for kindergarten children, (6) speed reading, (7) application of systems approaches to curricular development, (8) cost effectiveness, (9) program evaluation, and (10) others.

IER's major source of income is from school membership fees levied on a per-pupil basis. The eventual goal is for IER's budget to represent 1 percent of the operating budgets of the member districts. Other sources of income are from contributions by various businesses and industries. To date, contributions from the latter source have not met expectations, and plans are now underway to increase this revenue source.

The Joint Council on Economic Education (JCEE)

The JCEE, located in New York City, is an independent, nonprofit, nonpartisan, educational organization established in 1949 to encourage, improve, coordinate and service the economic education movement. Its board of trustees represents all sectors of the economy with financial support from various foundations, business, organized labor, farm groups and individuals. More than 30 public and private organizations actively cooperate with the JCEE on the national level. However, its principal medium for expanding and improving economic education is through a network of 103 affiliated councils that function at the State level and centers for economic education on college and university campuses.

The mission or goal of the JCEE is to improve the quality and increase the quantity of economics taught in our schools and colleges through increasing the economic content of schools' curriculums, better preparation of teachers, and improved teaching materials.

The JCEE also encourages the establishment of local organizations devoted to encouraging economic education, initiates research (experiments with new curriculums and new ways to prepare teachers), serves as a clearinghouse, and coordinates the efforts of national groups interested in economic education.

One hundred and thirty-seven (137) school systems across the Nation are involved as economic education laboratories in cooperation with the JCEE. The program now referred to as the Cooperating Schools Program grew out of the JCEE's Developmental Economic Education Program (DEEP), which operated between 1960-64. It originally began with 29 economic education laboratories, and represented "the largest experimental teaching program in the social sciences ever undertaken in the Nation's schools." The DEEP program was usually financed by grants from the JCEE, local school system funds, and contributions from private business groups or individuals that were in sympathy with the program goals. Technical assistance was provided by the JCEE staff and State or local affiliated councils.

The JCEE was initially funded by the Ford Foundation on a decreasing yearly basis. However, during the 1969 fiscal year, more than 229 contributors representing all segments of the economy supported the council.

Other activities with which the JCEE has been involved include the development of economic tests of economic understanding, curriculum guides, teacher training programs, institutes, development of 120 film television series entitled the *The American Economy* developed for College of the Air, and numerous other studies and reports.

Presently there are 45 affiliated councils in 42 States (6 additional council organizations are reported in the process of formation), 57 centers for economic education in 26 States, and 137 cooperating school systems in 32 States.

IMPLICATIONS

Industry/education cooperation promises many rewards in developing positive community attitudes and understanding of the schools, their problems, needs, and how they might do a better job of serving the community. Both the Banta-Towne and the Sovde studies seem to suggest that industry feels that working with the schools on a cooperative program fosters better relationships between the two groups, and the results are a better understanding by school people of the needs of industry and vice versa. Certainly, such cooperation can help school people plan and conduct their programs, especially their vocational programs, in ways that make them more relevant to the "now" world.

Contact with industry has also put at the disposal of schools a new range of expertise and consultative assistance in many broad areas including business management, public relations, research, and technical information. Contact with industry has also forced schools to develop greater flexibility in school scheduling, update courses and course contents, improve teaching methodology, and develop better instructional materials and facilities.

Industry, as a result of cooperating with schools, is much more aware of the problems faced by the schools, including financial and other situations, as they attempt to educate America's youth. Industry also is beginning to revamp their old practices of finding the man for the job to one of training a man for the job. Newer approaches reflecting the principles of the behavioral sciences are being applied by industry in such areas as employee screening, hiring, training and promotions.

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PREP No. 23-E

STATE LEGAL ARRANGEMENTS FOR EDUCATIONAL COOPERATIVES 1/

The most noticeable thrusts for cooperation in education of a formal nature seem to have come from State and Federal levels of interest. States have plenary power over education. (1:1-2) To provide the necessary improvements in education, some States have passed legislation for some type of intermediate or middle-echelon units or voluntary cooperative educational structures as a means to increase the quality, quantity, efficiency, and economy of education within their boundaries. In some cases the legislation mandates the middle echelon; in other cases the legislation is permissive, allowing cooperation between or among schools at an intermediate level.

Selected Enabling State Legislation for the Establishment of Educational Cooperatives

Wide differences exist among various States' legal arrangements for educational cooperatives and/or intermediate districts. An analysis of the major distinguishing elements of seven models of State legislation (Nebraska, New York, Pennsylvania, Tennessee, Texas, Wisconsin, New Hampshire-Vermont, an interstate school compact allowing a specific area in both States to cooperatively solve their educational problems due to geography) is given in this document. They reflect how each State has attempted to meet its own unique educational needs through cooperative arrangements. Only the legal aspects of these cooperatives are discussed in this document. Organizational details are covered elsewhere in the report.

Nebraska Services Unit

The Nebraska Legislature passed LB 301 in August 1965 which "created 19 multi-county educational service units designed to provide supplementary services for local school districts." (2:56) Emphasis was placed on those services that contribute to quality education which local school districts could not provide because of population or financial reasons.

1/ Much of the data for this document resulted from communication with each of the 50 States pertaining to (1) existing legislation that affect educational cooperatives and (2) for a review of the analysis made of each State's legislation.

Nebraska has fewer than 1.5 million people and 318,881 school pupils. In 1965 it had 2,546 school districts ranging in enrollment from one pupil to more than 59,000. One hundred and sixty-three school districts had enrollments of fewer than 300 pupils, and only two had enrollments of more than 10,000. In addition, most districts had no supervisory services or provisions for teacher inservice growth and development. (6:56-57) One of the major purposes or strengths of the Nebraska service unit is its designated role of coordinating, planning and administering federally financed programs for school districts which, because of their size, lack of staff, etc., are unable or ineligible to receive Federal funds.

The 19 multicounty service units are designed to cover all areas or school districts within the State. Size ranges from two to nine counties. Each unit is controlled by a board elected by the people. Each involved county is entitled to one board member, with four members being elected at large. The boards are empowered to levy taxes for educational purposes within a specified limit on all real and personal properties within the boundaries of each service unit. Provisions are spelled out whereby a county may either withdraw or be included in the service units by a vote of its populace. However, legislation is currently proposed to prevent school systems from being able to withdraw from the intermediate units at any time by a popular vote.

Major problems that plague the Nebraska service units are money, poor timing of the effective date for implementation of the legislation (middle of school year), and failure to abolish the old office of the county superintendent.

New York Boards of Cooperative Education Services (BOCES)

In 1948, the New York State Legislature passed legislation that established Boards of Cooperative Education Services (BOCES). The major purpose was to provide an intermediate-type school district structure to enable local school districts within supervisory areas to achieve programs of shared services needed because of sparsity of pupil population or needed educational offerings. (6:401-402)

Functions and services provided by the BOCES units are not limited by law. However, they must be paid for by the receiving local districts according to a weighted formula. In the case of State-approved services, the State picks up one-half of the total cost. This type of arrangement seems to give the State some control over the establishment of educational priorities and services to be provided by the BOCES units. BOCES units may consolidate or cooperate in various ways in order to make them more effective in providing needed educational services.

All financial transfers between the BOCES units and the LEA's are made at the State level with proper certification by the involved parties. LEA's may levy and collect taxes for all BOCES functions. LEA's, once they join BOCES, are also responsible for their weighted share of the BOCES administrative costs regardless of program participation. Any BOCES profits at the end of the year must be transferred back to the LEA's.

Public meetings of eligible voters are required for purposes of capital outlay expenditures involving buildings, lands, or properties. Property owned by BOCES is tax exempt; however, this is not true for leased or rented properties.

Pennsylvania Intermediate School Units

House Bill No. 40, presented in the General Assembly of the Pennsylvania Session of 1969, on January 22, 1969, as amended on July 15, 1969, provided that all local school districts be assigned to and be eligible to receive services of an intermediate school unit. The former 66 county school districts were divided into 29 intermediate school units. The cities of Pittsburgh and Philadelphia were established as separate intermediate units.

This bill had the effect of abolishing the old county board of school directors and transferring all powers and functions to the intermediate units. Several school functions and services are designated but do not limit the operations of the intermediate units. These designated functions and services are subsidized by the State. Other services beyond these are financed totally from local funds.

Provisions are made for contracting services with nonpublic schools. Also, any local school district may become partially or completely independent of the intermediate unit if (1) the service(s) is to be financed solely with local district funds, and (2) if the intermediate unit board of directors determines that such independent action will not adversely affect the services to be rendered to the remaining districts by the intermediate unit. (7)

Tennessee Educational Cooperative Act

House Bill No. 1149, signed into law on February 27, 1970, established permissive legislation to enable local school districts and/or local governmental units to cooperate in any way feasible in order to provide better services at more economical costs. (8)

The effect of this law seems to permit maximum flexibility for local school and governmental units in developing cooperative programs. However, local responsibilities for traditional services provided remain intact along with the basic or original governmental unit(s). The law provides for wide degrees of control or veto power by the State attorney general and by the affected reference group(s) within the structure of the State government. All financial arrangements are developed at the local levels subject to approval at the appropriate State levels. No special State financial arrangements currently exist for cooperatives.

Texas Regional Education Service Centers (RESC)

The Sixtieth Texas Legislature in 1967 authorized the establishment of 20 Regional Education Service Centers (RESC) in the State. (9) The major functions of these centers were designated as (1) diagnosis, (2) strategy and development, (3) dissemination and replication, (4) manpower development, and (5) internal program planning and evaluation. (9:1-15)

Although local school district membership is permissive, all districts are represented on the joint committees for planning each center's operations. The policymaking group (board of directors) is composed of lay members elected by an advisory group (joint committee). Advisory groups to each center consist of (1) *the joint committee*, a professional group representing local school districts and 4-year higher education institutions approved for teacher training programs, and (2) *an advisory committee*, composed of teachers, supervisors, and principals served

by the RESC. This type of arrangement seems to permit maximum participation and input by professional educator groups while at the same time ultimate control resides with a lay board.

The State provides basic financing for a center from the Minimum Foundation School Fund. This amount is set at $1 per student based on the average daily attendance in the center's district of service. State priority programs for the centers are encouraged through matching grants with the local districts.

The guidelines for the RESC are established by the State education agency. The operational guidelines of the centers seem to parallel those established by the SEA itself. The State agency guidelines deal with policy while those for the centers deal with local operations. This approach appears to have the effect of extending the influence and effectiveness of the SEA while at the same time providing maximum autonomy and participation of local school districts.

Wisconsin Cooperative Educational Service Agency (CESA)

On June 12, 1964, the Wisconsin Assembly Bill No. 254 created intermediate service units to function "as a convenience for local districts in cooperatively providing special educational services." (10:212-213) The creation of these 19 service units replaced the old system of 51 county superintendents of schools who were elected by popular vote. (11:1)

CESA's are designed to function at a level *beneath* the local school districts. Their major purpose is to serve as a vehicle whereby local school districts may cooperatively operate any and all services and programs for the improvement of education programs and opportunities.

While the State provides a fixed administrative allotment for the CESA's, no funds or priorities were established for program and/or service operations. This was left entirely to the local school districts to plan and finance on a shared basis. No taxing power or specific supervisory functions were designated for the CESA's. However, promoting consolidation of local school units into larger, more efficient units was designated as a function of CESA. This has caused considerable anxiety and apprehension among many local educators and citizens' groups, and has manifested itself in some opposition to CESA's within the State.

The success of the CESA is greatly dependent upon the abilities and skills of chief executives designated as "coordinators." However, the absence of any State priorities for programs and services as well as State financial incentives has caused difficulties for many of the CESA's in reaching their potentials. Many officials involved in a current State study of the CESA's feel that some State priorities should be established for the CESA units with additional State funds for program operational purposes. Others feel that a limited tax levying authority for the agencies might help.

New Hampshire--Vermont Interstate School Compact

On June 3, 1969, both houses of the United States Congress approved the New Hampshire-Vermont Interstate School Compact. (12) This permissive legislation

authorized the two States to formulate plans for the establishment and operations of an interstate school district. The major purpose of this act was to improve educational opportunities within the two States, and specifically at or near their boundaries.

Governance of the interstate school district was to be by an elected interstate board of directors subject to the approval of both the New Hampshire and the Vermont State Boards of Education.

This unique arrangement has important implications for other States with similar problems of providing adequate educational opportunities at or near their boundaries due to problems of finances, law, population, density, etc.

Analysis of State Legislation Permitting and/or Establishing Educational Cooperatives Intermediate School District

The following discussion of extant legal features derives from an analysis of the various State laws concerning educational cooperatives and/or intermediate school service agencies. The major categories presented result from a matrix which was developed as data were collected directly from the State legislative acts. This matrix appears as figure 3 at the end of this document.

Kinds of Legislation

Thirty-three States were identified as having legislation that permitted the existence of educational cooperatives and/or intermediate school districts. Two States (Missouri and North Carolina) reported no legislation to prevent school systems from cooperating; however, a cooperative could not be established as a separate legal organization.

California, Michigan, Oregon, and Pennsylvania mandate local school district participation in some cooperative structure. Among the 12 States that reported no legislation regarding educational cooperatives, it was not possible to determine whether any had laws strictly prohibiting cooperation among local school districts. Twenty-nine States have permissive legislation about educational cooperatives. Twelve States have legislation permitting "body corporate status." (At the time of this writing (fall, 1970) the authors were unable to ascertain whether legislation of any kind existed in five States.)

An interstate compact sanctioned by the United States Congress exists between New Hampshire and Vermont. The major purpose of this act is to permit cooperation between the two States in providing educational opportunities for citizens living near the contiguous State boundaries.

In some States cooperative organizations operate *below* the level of the local school districts. This arrangement prevents setting up a bureaucratic structure between LEA's and the SEA. Also, the strength of the cooperative rests with the value and utility of services that such an organization might provide local school districts on a noncoercive basis.

Each of the States with legislation relative to educational cooperatives prescribed methods for establishing public accountability and control over such cooperatives.

Financial Arrangements

Many different kinds of financial arrangements exist for financing a public organization. Eight States permit tax levying authority by the cooperative. No States with cooperative legislation prevent tax funds from being used to finance cooperative activities.

Some of the States actively encourage the use of local taxes for cooperative use through State financing incentives provided for in the legislation. Two States (Ohio and Texas) have State-local matching arrangements to encourage the use of local funds. New York has a similar arrangement for some programs. Virginia legislation penalizes LEA's (on a nonreimbursement basis) if State money is used for cooperation across LEA district boundaries.

California, New York, Ohio, Pennsylvania, Texas, and Wisconsin have arrangements for some minimum level of funding by the State on a yearly basis. Michigan and several other States enjoy limited guaranteed State funding for certain programs on an annual basis.

Nearly all of the cooperatives are permitted to receive Federal, State, and local funds as well as gifts, donations, and foundation grants.

Tasks or Functions

Most of the States permit wide latitude relative to the activities in which a cooperative may engage. The cooperative for the most part is able to provide any services desired by the participating school districts. Some States permit the cooperatives to contract with as few as one school system to provide a desired service or program. Others mandate certain programs and services that *must* be performed or provided by the cooperative. To summarize, the cooperatives, for the most part, are able to administer and/or to provide any programs or services that any local board of education may legally provide.

Organizational Structure

The organizational structures of the educational cooperatives are similar to the wide range of structures that exist for public education across the country. Each State legislates methods for holding any public organization accountable and responsible to the public and/or its elected officials. The typical organizational structure for educational cooperatives consists of a lay board, a professional advisory committee, and an appointed chief executive. Accountability and responsibility are primarily to the cooperative's own board and constituent school districts.

Personnel

Personnel that are mentioned in State legislation for education parallel those that are found in the Nation's public schools. Of particular importance, however, is that educational cooperatives are able to provide shared personnel for two or more school systems to effect better economy as well as program offerings and services.

This type of sharing is particularly important as it might involve highly specialized, highly salaried, and scarce specialists that few small school systems alone can afford. Cooperatives are not restricted in the kind of personnel they might employ by traditional State regulations, certification requirements, etc.

Stated Salaries

Two States (California and Wisconsin) specify the salary range of the chief administrator of their educational cooperatives. Most States are either silent on the subject of salary or they delegate the salary scheduling responsibilities for all personnel to the controlling board of the individual educational cooperative.

Legal Minimum Sizes

Only four States (Colorado, Michigan, Ohio, and Texas) speak to the question of minimum size for an educational cooperative and/or intermediate school district. The stated minimum sizes range from 5,000 to 50,000 pupils, with Texas making special concessions to rural school districts. The other States are silent on this matter in the legislation. Usually the legislation suggests that the member districts be contiguous.

Supervisory Program Accountability

Ultimately, program accountability of any public agency created by the state is to the public and/or its elected officials. For the most part, the educational cooperatives are responsible to their clientele, their own board of control, the State superintendent, and the State education agency.

Supervisory Line Power

Only those educational cooperatives and/or intermediate school districts that operate in some area(s) of responsibility as arms of the State department of education possess any supervisory line powers over local school districts. States that have legislated specific line power enforcement capabilities to educational cooperatives and/or intermediate school districts include California, Iowa, Michigan, New Jersey, Pennsylvania, North Dakota, and Wyoming.

Housing-Property Arrangements

Most States permit educational cooperatives to own property by some means. In New York State the voters must approve the purchase or building of real properties for the BOCES units, which is then handled through the State Dormitory Authority. Florida, Illinois, and West Virginia specify that any real properties must be held in the name of the local school district in which they reside. Several States permit joint ownership of properties.

Retirement and Tenure

Although no State law provides tenure for educational cooperative personnel with the cooperative, retirement and other fringe benefits are provided by the State. This is usually done through existing programs for regular State-employed personnel. These benefits are able to be continued if employment is transferred to another educational or governmental agency within the State.

Program Evaluation

Program evaluation is increasingly being written in cooperative legislation. This seems to force a review of program operations and their effectiveness at regular time intervals. Also, program "spin offs" to individual LEA's are enhanced through evaluative efforts. This also helps to keep the cooperative programs fresh, dynamic, and more on the "cutting edge" of newer educational programming and practices. The results are positive in the same directions for the participating LEA's.

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Figure 3--Matrix Analysis of State Legislation For Educational Cooperatives And/Or Intermediate School Districts

Item	A Type of Legislation	B Financial Arrangements	C Task or Function	D Organizational Structure	E Personnel	F Salaries	G Estab. Minimum Size	G Supervisory Program Accountability	I Supervisory Line Power	J Housing Property Arrangements
	Permissive	Body Corporate	Mandatory Local District Participation	Tax Levying Power	Local Districts May Levy Taxes for Cooperative or Interm. District	State Financial Support	Suggest or Mandate Programs or Services (but not limiting)	Shared Service and Cooperative	Prescribes Organizational Structure	Organized on Multi-County and/or Fractional County Basis	Organized on Single County Basis	Suggest Personnel (but not limiting)	Prescribes Qualifications/Job Description for Chief Executive	Employee Benefits available From State	Board Fixes Salary of Chief Executive	Establishes Minimum Size	Specifies Supervisory and/or Program Accountability	Exercises some SDE Supervisory Line Powers over LEA's	Facilities Financed by State	Joint Ownership of Property Permitted
Alabama 2/		X					X	X	X		X	X	X	X			X			
Alaska	X							X	X								X			
Arizona 1/																				
Arkansas 1/																				
California		X	X		X	X	X	X	X		X	X	X	X	X		X	X	X	
Colorado		X	X				X	X	X	X		X	X	X	X	X	X	X	X	
Connecticut																				
Delaware 2/																				
Florida				X		X	X	X	X								X			
Georgia									X		X						X			
Hawaii 2/																				
Idaho		X	X		X		X	X	X								X			
Illinois		X	X				X	X	X								X			
Indiana		X	X				X	X	X			X	X		X		X	X		Y
Iowa		X	X	X			X	X	X	X		X	X				X			
Kansas 2/																				
Kentucky		X	X				X	X	X			X	X	X			X			
Louisiana		X	X				X	X	X			X	X				X			
Maine 1/																				
Maryland 2/																				
Massachusetts		X	X				X	X	X								X			
Michigan		X	X	X			X	X	X	X	X	X	X	X		X	X	X		
Minnesota							X	X	X								X			
Mississippi 1/																				
Missouri 4/																				
Montana		X	X				X	X	X			X	X	X			X			
Nebraska		X	X	X			X	X	X								X			
Nevada																				
New Hampshire 3/		X	X			X	X	X	X	X	X	X	X	X			X			
New Jersey		X	X				X	X	X			X	X	X			X			
New Mexico 3/		X	X		X	X	X	X	X			X	X	X	X		X			
New York		X	X				X	X	X			X	X	X			X			
North Carolina 2/																				
North Dakota		X	X	X	X	X	X	X	X			X	X	X			X			
Ohio		X	X				X	X	X			X	X	X		X	X	X	X	
Oklahoma																				
Oregon		X	X		X	X	X	X	X			X	X	X	X		X			
Pennsylvania		X	X				X	X	X			X	X	X			X			
Rhode Island 1/																				
South Carolina 2/																				
South Dakota		X	X	X			X	X	X			X	X	X			X			Y
Tennessee		X	X		X		X	X	X								X			Y
Texas																				
Utah		X	X				X	X	X			X	X	X	X		X		X	
Vermont 3/		X	X				X	X	X			X	X	X			X			
Virginia 2/																				
Washington		X	X			X	X	X	X	X		X	X	X	X	X	X	X		
West Virginia		X	X			X	X	X	X								X			
Wisconsin		X	X				X	X	X			X	X	X			X			
Wyoming		X	X				X	X	X			X	X	X			X			

1/ Unable to secure copy of legislation.

2/ No legislation - as reported via correspondence with the State education agency.

3/ Federal Interstate Compact.

4/ Legislation does not permit the establishment of cooperatives as separate legal organizations.

Note--The reader is cautioned against making any conclusions or generalizations about the analysis of any State's legislation as analyzed on this matrix. This analysis is the result of a limited and strict interpretation of each State's legislation. No attempt whatsoever was made to ready anything into the law(s); therefore, the matrix analysis reflects only what is stated explicity in the legislation and not what the educational cooperatives and/or intermediate school districts might be doing or are allowed to do within each State. For this information, the reader is referred to the appropriate and related State department of education's rules, regulations, and guidelines pertaining thereto. Efforts to have the legal department in each State and/or each State's department of education to review the analysis of their State laws for purposes of accuracy and verification are incomplete at the time of this writing.

PREP

No. 23-F

PERSONNEL FOR EDUCATIONAL COOPERATIVES

Personnel employed by various educational cooperatives provide insights into the operations of these regional educational agencies. The pervasiveness of educational cooperatives made an exhaustive compilation of personnel impractical. (For example, in 1969-70 nearly 4,200 professional personnel were employed in New York State's BOCES). However, analyses were made of personnel in selected cooperatives and the results are presented herein. Of most importance are the *kinds* of personnel and the identification of emerging new professional roles and evident trends in personnel needs. The nomenclature for positions in regional education agencies was different from State to State and from cooperative to cooperative. The staff took some license in categorizing personnel based upon job descriptions.

General broad headings for personnel classifications[1/] used in the study included levels classified as:

1. General or agencywide administration and specialists.
2. Supervisor, director, coordinator, consultant, including personnel with specific program administrative duties.
3. Subject-matter specialists or itinerant teachers.
4. Supporting staff, both (a) professionals, including such services as social, psychological, medical, pupil personnel, etc., and (b) nonprofessionals.
5. Outside consultants and others.

1/ A position classified above as 2 (director, coordinator, supervisor, or consultant) meant that this role had major program responsibilities and/or supervision over a staff. This is akin to the director or supervisor level in a large school organization. (If a person worked directly with schools, he was classified as 3, a subject specialist or itinerant teacher.) Level 2 had responsibilities for a number of schools and in many persons often served as a resource for faculties of constituent school districts in the cooperative.

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In some cases the data were obtained from reports from the State education agency of the numbers and types of personnel presently working in cooperative arrangements in the State; in other cases data were obtained from project reports or from interviews and site visits.

Figure 4 provides a summary of personnel requirements in one well-developed intermediate educational service unit by showing the organization flow chart. Figure 5, page 4, portrays a summary of the statewide regional education agency personnel needs in the BOCES structure of New York State. The numbers of personnel in each of the major personnel classifications are shown. The total of nearly 4,200 professional personnel in one kind of regional education agency of just one State (although it is the largest of the statewide regional education programs and, therefore, not representative) suggests that provision of personnel for such agencies could be a major concern of higher education and inservice training directors. Figures 4 and 5 demonstrate the extent and diversity of personnel positions in regional agencies.

From a review of figure 4 it is clear that a well-developed regional agency provides a spectrum of services for the constituent local districts and that the staff is complex. Figure 5 shows the relative numbers of the various personnel used in the statewide network of regional agencies. Occupational and special education account for nearly three-quarters of all personnel positions; administrative and management services account for only about 5 percent of the personnel positions.

Discussion of Selected Positions

As functions become clearly identified, staff positions are developed to carry them out. As functions and services of cooperatives were reviewed, special note was made of various personnel responsibilities in order to identify roles that are not "common" to contemporary education jargon. Examples of these positions or roles are: State and Federal relations, planner, redesigner, communicator.

In some cases a function of the cooperative is not carried out by an individual staff member, but is a committee responsibility (e.g., the legal and legislative committee of the Surburban School Districts of St. Louis, where a committee works with the legislature and the courts to provide better services for pupils). There are at least two other ways of providing services of coordination with the legislature. This activity can be assigned to a single staff member (Oakland Schools, Pontiac, Mich.) to work directly with the legislature (as a "lobbyist," but with the title of State and Federal relations). The Western New York School Development Council conducts workshops to inform legislators about trends, needs, and accomplishments of education. In either case the ends appear to be the same: better communications between schools, social agencies, and policy makers.

Many regional education agencies make extensive use of professional staff--from teachers with 4 or more years of training to highly trained technical specialists such as programers to psychologists and those providing medical services. Other cooperatives obtain and employ staff in different ways.

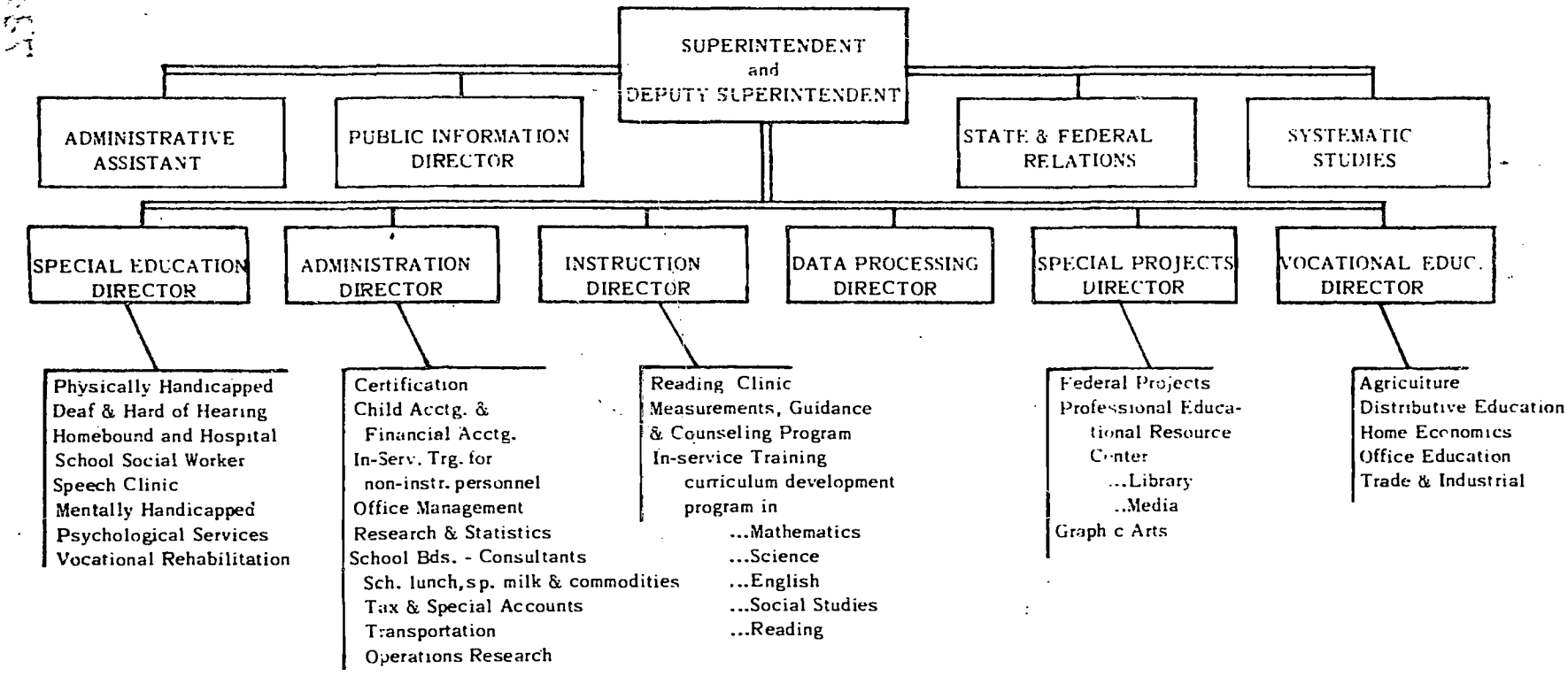

Figure 4--The Oakland Schools, Pontiac, Michigan, organizational flow chart demonstrates the range and scope of services and personnel needs of a well-developed intermediate education unit.

SUMMARY OF PERSONNEL: NEW YORK STATE BOCES 1/

Classification	Title of Position	Personnel	Subtotal
Itinerant Teacher Service	Art	82.5	
	Driver Education	76.9	
	Foreign Language	19.6	
	Industrial Arts	17.5	
	Librarian	18.9	
	Music	89.9	
	Physical Education	36.5	
	Reading	49.3	391.1
Administrative and Management Services	Consultant Services	77.4	
	Coordinators and Supervisors	144.3	
	Communications Center	31.0	
	Data Processing	29.0	
	Library Processing	6.0	287.7
Pupil Personnel Services	Child Adjustment or Guidance Centers	4.0	
	Dental Hygiene	88.0	
	Guidance Director or Counselor	44.6	
	Nurse Teacher or Attendance	33.0	
	Psychological Psychiatric Services	175.0	
	Social Worker	32.1	377.3
Special Education	Mentally Handicapped	794.2	
	Physically Handicapped	345.3	
	Emotionally Disturbed	249.0	
	Speech and Hearing Correction	175.9	1564.4
Occupational Education	Occupational Education	1311.4	
	Adult Occupational Education	132.0	1443.4
Gifted and Enrichment	Gifted and Enrichment	101.0	101.0
Miscellaneous Services	Miscellaneous Services	33.7	33.7
		Total	4198.6

1/ Summarized from *Boards of Cooperative Services, 1969-70, Teachers Programs Approved,"* The University of the State of New York, The State Education Department, Bureau of School District Organization, Albany, New York. This table is a summary of actual titles which appear as Attachment V.

Figure 5--Personnel summary from a statewide educational intermediate service agency.

The trend in school study and/or development councils, due both to financial limitations and the kinds of services provided, is to make extensive use of advance graduate students under the supervision of professional staff (which may be on a part-time assignment from the sponsoring institution of higher education). Often these graduate students--called research associates, staff associates, council fellows, or some other similar title--are serving internships and/or conducting doctoral research in support of, or in cooperation with, council activities.

Some cooperatives employ interns or graduate assistants; the close connection between some cooperative endeavors and higher education encourages use of graduate students to assist in program activities, as well as using the cooperative as a training ground for advanced students. Some cooperatives use graduate students under supervision to initiate and operate new or "high risk" projects on a trial basis (e.g., Tennessee--comprehensive psychological services). This procedure has several benefits not only to the student (experience and remuneration) but also to the agency which can try an idea without making a commitment for permanent staff until after the program process itself.

Some regional education agencies apparently received their impetus from an original interest in shared media services (e.g., Pennsylvania, Texas, Iowa). As educators make more varied use of media and technology, the regional agencies are providing more specialists in media utilization, as well as technicians for the production of audiovisual materials. Some cooperatives employ staff to develop media packages to assist teachers in the presentation of concepts to their classes (e.g., Rural Supplementary Education Center, Stamford, N.Y.; Regional Educational Service Centers, Texas).

Along with expanded media services, some cooperatives have a major responsibility in providing educational television (e.g., Dade County, Fla.; St. Louis, Mo.). In these situations the personnel of the agency include directors, producers, television teachers (often on loan), and the technical and supporting staff to operate the program and studio.

The increased need for the continuing (inservice) education of teachers and the inaccessability of colleges to many schools apparently has encouraged cooperatives to employ inservice directors to plan multidistrict regional inservice programs. Personnel in this category may also be engaged in training activities for paraprofessionals (aides) and some professional staff (preservice and inservice), especially in programs recently sponsored through the Education Professions Development Act (e.g., Texas, Tennessee, Pennsylvania).

Regional education agencies employ staff to implement new or marginal programs, often in response to current social trends or demands. This is exemplified by the fact that some cooperatives have specialists for such things as drug abuse, (e.g., Texas), humanities (e.g., Ohio, Education Research Council), civil rights programs (e.g., Texas), and youth leadership programs (e.g., Dilenowisco, Va.; Bucks County, Pa.; San Diego County, Calif.).

The Texas Regional Educational Service Centers have employed at least one "planner" and one "communicator" for each agency. Since the Texas State Education Agency could not find an institution of higher education that prepared educational planners, it contracted with General Learning Corporation to develop a training program. Twenty planners were trained for regional agencies. Each of the 20 was

responsible for conducting for local school districts in his region a similar workshop so that a "multiplier effect" was accomplished. Thus, each local district developed an "educational planner" to work directly with the regional planners.

With the increased emphasis on planning (a necessary activity in the face of demands for evaluation, accountability and more "businesslike" administration), it is evident that cooperatives will include personnel to facilitate this function. In 1970 the Appalachian Regional Commission (ARC) made planning funds available to several educational cooperatives or regional education agencies in Appalachia. The cooperatives have personnel to collect baseline data and to initiate elements of planning both in terms of program and personnel.

A regional education agency is most often seen as a service agency (not only instructional, but also administrative services) for a number of local school districts. The staff, therefore, reflects administrative and service arrangements and contains administrative assistants and personnel in business and purchasing, certification and attendance, food services, social work, transportation services, medical, and mental health services.

Some regional agencies provide computer and/or data processing activities and services. These cooperatives use clerical supporting staff for key punch and routine activity and employ highly trained professionals and technicians for operation of the data processing service (e.g., OTIS, Ore.; Erie #1, BOCES, N.Y.). There seems to be an increase in regional utilization of computer services and facilities which will require expansion of this personnel category.

The cooperative is a logical locus for utilization of external consultant assistance since many local districts within the regional agency have similar problems and can share the benefits of the consultancy as well as the costs. A number of cooperatives indicate that they make extensive usage of part-time consultants. (Some long-term consultant activities were also reported.) Some cooperatives reported using consultants to initiate trial programs prior to their being evaluated and possibly incorporated within the cooperative's program structure. (Due to the nature of consultant services, consultants generally are not considered as personnel of the cooperative.) Consultants are frequently employed for personnel training and to conduct specific studies.

The level of organizational development and the task and function of the cooperative generally dictate the composition of the staff. The major purposes and functions of the cooperative provide a base for evaluating personnel needs. As the cooperative serves more than one district, personnel can be obtained to provide services for marginal programs, allowing local districts to at least participate in new programs before they could afford a full-time staff for the program. The gamble of initiating "high risk" programs can be distributed among a number of local districts with no long-term commitments to staff and program expansion by using the cooperatives as a locus for the program, and by judicious usage of consultants or internships.

SUMMARY

The following position titles and descriptions serve as a summary of the kinds of educational positions appearing in educational cooperatives, although not always by the specific name as given. Some roles have been combined for presentation and may be expanded in well-developed agencies or as demand for services is increased. In some cases, a summary of representative activities of the role is included if the title is not self-explanatory.

Educational, Community, and/or Regional Planner.--Develops long-range planning activities and model designs.

Educational Evaluator.--Monitors and evaluates new programs of the cooperative and engages in specific evaluation tasks as designated by local districts participating in the cooperative.

Inservice Director.--Refines and develops new inservice approaches aimed at continuous upgrading of educational personnel.

Media and Communications Systems Specialist.--Maintains and enhances communication flow and aids in media development, utilization, and service.

Program Developer and/or Public Information.--Develops proposals and processes information for local schools and/or local district use, as well as preparing brochures or other public information materials (the communicator or linker function).

Federal and/or State Program Coordinator.--Maintains files and current information on new Federal and State programs and mandates. This person may engage in liaison with the Government (lobbying) and attempts to utilize political "clout" or influence for the cooperative.

Personnel Coordinator.--Maintains a personnel file for the cooperative and, acting with the direction and assistance of local personnel, engages in initial recruitment activities.

Researcher and Special Programs Coordinator.--Conducts research activities, which although usually limited, are necessary in the development of new programs in evaluation.

Data Processer.--Conducts data processing services and activities.

Materials Specialist and Clerical Assistant.--Develops learning and/or media packages, including teaching aids, audiovisual materials, etc.

No. 23-G

CENTRAL FACILITIES FOR EDUCATIONAL COOPERATIVES

Most of the central facilities of educational cooperatives are located in buildings designed for other purposes. Yet, the central facilities needed by complex educational cooperatives may require the most unique of designs because of the varied activities that may be conducted there. Only in those instances where a State has mandated an intermediate service agency, such as the county intermediate school unit or the New York BOCES, have new facilities been especially constructed to house the services to be provided.

There are perhaps two reasons for the lack of especially designed facilities. One, the multipurpose educational cooperative of a non-mandated nature is just beyond its genesis stage. Second, in many instances the nature, sources, and legalities of funding the cooperative are such that capital expenditures are limited to equipment, and then often only on a rental or lease basis unless the contributing agency (one of the local school districts, for example) retains title. The vagaries of the financial support systems of educational cooperatives thus inhibit the building of appropriately designed central facilities.

Largely then, educational cooperatives are housed in renovated buildings--former factories, abandoned schoolhouses, office buildings, for example. As certain legal restrictions are modified and funding is placed on a stable and continuous basis, this can be expected to change. When this occurs much care must be directed to designing buildings which not only efficiently house the existing program but also are flexible enough to meet the demands of future program developments.

Existing Exemplary Central Facilities

Little research has been conducted about the nature and need for central facilities to serve educational cooperatives. Only two such studies have been completed, both by Hughes in 1968. (1;2) These studies reveal some rather unique approaches to the problem of housing multipurpose cooperatives, mostly in renovated structures. The following brief narratives about several cooperatives illustrate the trends, needs, and, at times, creative solutions to problems of housing which are evidenced in different kinds of cooperatives. The narratives also point out the varied nature of the services rendered and the implications these have for the design of central facilities.

Educational Development Center, Newton, Mass.

Although the EDC can only loosely be defined as an educational cooperative, three aspects of its operation are of direct relevance to educational cooperative central facilities. A most complex television operation is maintained. While no direct televising is carried out, the studio arrangement and service areas have pertinence to the development of any central facility which will have, as an aspect of its operation, educational television, and/or videotaping.

The second aspect is the development of a mobile educational laboratory with capability of diverse functions. The laboratory is used for inservice training, cultural exhibits, and a variety of instructional programs.

Third is the inservice training program conducted by EDC. Change in teaching techniques begins to emerge when teachers have the opportunity to help develop their own curriculum and instructional materials. Thus, a cooperative with a strong inservice thrust should probably have a central facility which includes classrooms, seminar rooms, and a curriculum laboratory.

Rural Supplement Education Center, Stamford, N.Y.

The Rural Supplementary Education Center is one of 41 shared educational services which are provided cooperatively to the schools through the Board of Cooperative Education Services. The primary purpose of the Center is to assist schools and communities with means of expanding the refining educational programs through instantaneous offerings of resources of knowledge. Both students and teachers may avail themselves of such information through a multimedia system of communication especially geared to the needs of the rural area.

School aides are placed at each school site to organize and coordinate major work activities of the Center. Ten prefabricated elementary classrooms are on each site to house a regular class to free interior space within the school structure. This area contains audiovisual materials and equipment which are accessible to the student body with a minimum of inconvenience.

The central facility is housed in a remodeled resort hotel which contains multiuse spaces that are carpeted, acoustically tiled, and equipped with fluorescent lighting. These spaces are used for visitor reception areas, art exhibits, conferences, teacher workshops, audio- and videotape presentations. A mobile unit delivers materials and equipment to each school at least twice weekly and is garaged at the central facility.

Additional services provided by the Center include videotape recorders housed in the core-unit which relays programs from four ETV stations to homes and schools in the area. Telelearning equipment is provided which enables students and teachers to utilize resource persons anywhere in the United States or foreign countries.

The provision of each of these services has obvious implications to the nature of the central facility. Implied especially is flexibility in interior spaces and adequate sound treatment.

The Educational Media Center, Auburn, Ala.

The Educational Media Center is located in the basement of the College of Education building at Auburn University. The space consists of three areas: (1) a converted classroom for office space, (2) an old classroom which has been refurnished as a media demonstration center, and (3) a third room equipped as an instructional materials center for a school system, which contains professional materials to be used in the preservice and inservice training programs of the Center. Space in the college's instructional materials center is provided for the project for study carrels, a small audiovisual repository, and a TV studio. The conversion of existing facilities for the needs and purposes of the Educational Media Center have been adequate in design, although a major drawback is lack of adequate space.

Board of Cooperatives Educational Services, Erie County, N.Y.

A converted building, with some new construction, serves as the central facility of this center. The Harkness Center has approximately 40,000 square feet of which 20,000 were constructed within the last 4 years. The Potter Road facility is similar in square feet. The combined cost of both facilities was 3.5 million dollars, and the buildings are multiple story and concrete block in basic construction.

Oakland County Service Center, Pontiac, Mich.

This Center is designed to provide: (1) a complete computer-associated administration program for districts served, (2) a closed circuit television system for use within the central facility and for the production of video tapes which may be used by local schools, and (3) a telephonic communication system with a conference call network for the use of teachers of homebound children.

An extensive inservice training program is operated and a reading repository houses professional materials. In addition, major consultative services of a clinical nature operate out of the central facility.

The new central facility provides a professional library of printed and audiovisual materials to be distributed to all 28 schools in the district. Consideration is being given to computerizing this central facility professional library so that typewriter terminals in each school building within the system can, using an available code listed in each school, obtain printouts of all card catalog information in summary form within the local school. This particular program has exciting possibilities for centralized storage and distribution of library materials in educational cooperatives serving remote areas.

Intermediate Educational Service Center, San Diego County, Calif.

Support of most of the services of this intermediate unit is voluntary and on a contractual basis. Such services include the audio-visual materials center, library, data processing, EMR class operation, and mobile industrial arts.

The Intermediate Service Center is housed in a campus style complex composed of five rectilinear structures that include physical spaces for staff, auditorium school and professional libraries, audiovisual repositories, conference rooms, printing shops, photo labs, data processing center, and service facilities such as a lunch room, garage, and shipping dock. The facility also houses a service area for the mobile industrial arts units.

Instructional Television Center, Miami, Fla.

This Center serves all public schools in Dade County. Some private and parochial schools also have contractual arrangements with the Dade County Board of Public Instruction.

The primary objective of the Center is threefold: (1) to facilitate learning by stimulating student interest and exploration, (2) to coordinate television presentations with relative learning activities, and (3) to save on classroom construction by employing television to teach large classes.

The Board of Public Instruction has invested a total of $1,317,255 in land, a transmitter building, tower, and broadcasting equipment. The transmitter building and tower for the open-circuit stations are located in Broward County. The transmitting tower for the 2,500 mc system is located at Cutler Ridge Junior High School.

The Center is located on the second floor of the Lindsey Hopkins Building which houses the central offices of the Dade County Board of Public Instruction. The Center has two complete studios, 45 feet by 25 feet high, each with standard professional equipment, including four image orthicon Marconi cameras; two light control panels with dimmers for 60,000 watts each, rear screen projection equipment; and special effects amplifiers. Control rooms contain video switching consoles, five broadcast videotape recorders, four film chains, four 16 mm. projectors and testing equipment.

The materials room houses over 2,800 telelessons, a file of more than 40,000 illustrations and photographs, more than 150 audiotapes, and 4,230 disc recordings. A fully equipped photographic laboratory with sound-on-film cameras and accompanying equipment is used for local productions. A storage room, 56 feet x 17 feet, is used to store props.

SUMMARY

Planners of central facilities for educational cooperatives should be fully aware of all activities to be undertaken. The span of activities will vary according to need, location, financial status, as well as other criteria. Clearly much use of the open space concept of design would provide maximum flexibility. Too, small work areas with desks, carrels, etc., are needed for consultants and specialists to prepare materials; large spaces are needed for demonstrations and meetings.

One major function of the central facility may be the provision of mobile educational laboratories. These units can be used for industrial arts, home economics, reading repositories, cultural exhibits, teaching materials, and a variety of other instructional programs. Each can be adequately housed, equipped, and staffed by central facility personnel.

Another significant function of the central facility seems to be inservice training programs. Special housing needs for this function are a library resources area, small and large group meeting areas, and perhaps a model classroom for demonstration teaching. If the region to be served is widely scattered, attention may also need to be given to the construction of living quarters.

Central facilities can house repositories of audiovisuals including ETV, closed circuit TV, and videotapes. Additional space should be available for data processing and computer equipment, telelearning centers, telephonic conference call systems, and photographic dark-room operations.

In many cases central facilities consist of converted classrooms or storage and warehouse spaces. Needed areas include conference rooms, instructional materials center, little theatre, storage, shipping dock, and a garage to house mobile laboratories. Adequate dining areas for large and small groups should also be provided. All spaces should be carefully planned with the best quality of visual, acoustical, and thermal furnishings. Furniture and equipment should be selected according to the task to be performed with emphasis on durability and flexibility.

Central facilities must provide adequate spaces for full-time specialists, including reading consultants, therapists, psychologists, home-bound and EMR personnel, as well as many temporary and part-time consultants.

SUMMARY, TRENDS, AND CONCLUSIONS

Following are the major findings of the study, the authors' interpretations of these findings, and some of the trends apparent from the study:

- More and more school districts in the United States are joining in various kinds of cooperative arrangements. These cooperative ventures provide a locus for such activities as program development, planning, State and Federal project development and implementation, and for working with community groups. The cooperative also provides a single location for foundations and other organizations to work directly with a number of school districts.

- Where less formal cooperative endeavors, such as participation in school study councils or personnel sharing, have occurred, formal arrangements seem to develop faster and to be stronger and more effective.

- Federal legislation has provided some impetus for cooperation. Title III, ESEA, funds particularly have been used for the development of planning regions on a statewide basis (e.g., Kentucky and Texas).

- Some States that have had formal intermediate units or other kinds of educational cooperatives on an informal basis are now redistricting, restructuring, or studying the same; consequently, some expanded regional networks with specific purposes are appearing (e.g., Minnesota and New York).

- There is a trend for the development of regional agencies not to follow county boundaries or be coterminous with other political boundaries, but to be designed on the bases of travel distance, socioeconomic similarities, and numbers of pupils which can be most effectively and efficiently served.

- New professional and organizational roles are appearing, and the cooperatives seem to be the location for the development of new personnel types. There is demand for persons with planning skills and for specialists in program development and technology. Educational Communicator is another identified emerging role.

- Some States and local districts are establishing cooperatives which, in effect, are creations of and controlled by the local districts; that is, the cooperative is formed under the control of the local agency and is not a part of the hierarchy between the local and the State level.

• The move toward cooperation appears to have been a function of or an assistance to small and rural districts striving to gain the equality of educational opportunity afforded pupils in large suburban or urban school districts. New and expanded services have been provided through the vehicle of cooperation. However, the decentralization of urban school systems leaves the previous central administration unit with many of the functions of regional cooperative educational agencies.

• There has been a dramatic increase in the growth of school study councils. The year 1969-70 saw the formation of the largest number of school study councils since the initiation of the movement in 1942.

• Regional education agencies are increasing their effectiveness by combining their planning and coordination capabilities, and coordinating these with other State regional efforts specifically developed for such areas as health planning, vocational education districts, and community college districts. In some cases, the regional education agency boundaries parallel these other planning or regional groups. The rapid growth of councils of governments or elected officials, regional planning commissions, and economic development districts in the 1960's has greatly influenced regionalism in education.

• There are two major roles and/or functions of regional education agencies: (1) to provide services to pupils and teachers in local schools and (2) to improve the administrative organization, structure, and operation of school districts within a predetermined area.

• Although much is said in the literature about the cost effectiveness or economic efficiency of cooperatives or regional agencies, there are few hard data on cost effectiveness or on evaluation of cooperative programs or the agencies themselves. This may be true because many cooperative programs are expansions, "add-ons" or improvements of the current program, and local districts are reluctant to replace or redirect ongoing programs with newer programs. Thus, certain economies and efficiencies cannot be ascertained. There is another artifact in the discussion of economy. By joining in cooperatives, local districts can obtain programs which they previously did not have. This is an expansion of services and does not reflect a reduction in the operating budget since there are more services. Thus, local districts can take advantage of new programs, but they do not show a hard cash dollar saving. The cooperative allows them to expand in areas where they previously would be unable to provide services.

• The large personnel demands of regional education agencies suggest that institutions of higher education should be cognizant of the need to produce additional educational experiences and training activities to prepare personnel for the specific roles in the educational cooperatives. (This is highlighted by the fact that Texas had to look outside the area of higher education to train their planners.)

- Many of the educational cooperatives that are not formal (i.e., State-mandated) organizations have not publicized their activities. There is probably much cooperation going on which is not known.

- The apparent impetus for much cooperation is at the grass roots level. Once informal cooperation becomes a "habit," formal cooperation is facilitated in a region. Indeed, even in New York State, which was the first to form the "new intermediate unit" with its Boards of Cooperative Education Services, there were numerous school study councils in operation since the early 1940's which gave impetus to statewide regionalism.

- Legislation which permits or requires regionalism shows some interesting patterns or trends. More recent legislation provides for the participation of the cooperative's employees in State retirement plans, but is silent on the question of tenure in the positions in the cooperative. Recent legislation provides some State baseline support for the regional agencies and, in some cases, incentives are built into the formula for support of programs in the cooperatives. Recent legislation is also more permissive in allowing various programs and in allowing authority for taxing if there is a local referendum in favor of it. On the other hand, some recent laws require a review and/or evaluation of the cooperative and the cooperative programs on a periodic basis. In some cases, legislation mandating educational regionalism indicates that the regional agency is to become an arm of the State education agency or specifies tasks which the agency is supported to perform.

- Cooperatives which do not receive State baseline funding or are not given provisions for State matching funds find it difficult to operate in many instances; a major continuing concern then is the location of financing for operation. Various organizational strategies and program development techniques have been forwarded to find the funds for operation of these cooperatives.

- Educational cooperatives allow the schools to respond more rapidly to social demands. Marginal or socially relevant programs can be experimented with more easily in the cooperative. "High risk" ventures are spread over several school districts, and there is less criticism if the program does not prove to be effective during the first few years of operation. School study councils probably initiated this approach as school administrators tried to find ways to legitimately experiment in the development of educational programs before research and development were legitimate functions in education.

- There is an obvious trend toward cooperation and regionalism in education. While the 1940's through the 1960's can be thought of as a period in American education when there was a great emphasis on consolidation, and the late 1960's will be remembered as a period when large school districts attempted decentralization in order to make massive school districts more responsive to segments of the local population, it is probable that the 1970's will be remembered in part as the time for the expansion of the cooperative idea. The educational cooperative or regional agency provides much of the flexibility and service capability of large districts while allowing for local control and direction of the individual districts or schools.

IPRIP

No. 23-I

Current ERIC Documents on Educational Cooperatives

The following documents recently entered into the ERIC system will keep the reader abreast of some of the latest developments in cooperative education:

Shared Educational Services in New York State; Emphasis--Occupational Education Programs, 1968-1969. ED 039 355. 77 pp. MF - 65¢; HC - $3.29.

Oklahoma Consortium on Research Development. ED 040 693. 29 pp. MF - 65¢; HC - $3.29.

An Evaluation of the Municipal Cooperative Education Program of the High Schools of the City of New York. ED 041 958. 138 pp. MF - 65¢; HC - $6.58.

Applying the Cooperative Plan of Instruction to Manpower Programs. A Handbook for Supervisors and Coordinator. ED 040 291. 176 pp. MF - 65¢; HC - $6.58.

Cooperative Distributive and Office Education Programs. ED 039 322. 109 pp. MF - 65¢; HC - $6.58.

Industry and Education Study No. 2. Partnerships: "Partnership" High Schools: The Search for New Ways to Cooperate. ED 038 534. 63 pp. MF - 65¢; HC - $3.29.

Shared Services Boards. An Analysis of the Development of a Pioneering Educational Experiment in Suburban and Rural Areas of New York State. ED 038 190. 30 pp. MF - 65¢; HC - $3.29.

Guide for Cooperative Vocational Education. ED 037 564. 136 pp. MF - 65¢; HC - $6.58.

The above documents are available in microfiche (MF) and hard copy (HC), at the prices cited, from the ERIC Document Reproduction Service, Leasco Information Products Co., 4827 Rugby Ave., Bethesda, Maryland 20014.

National Center for Educational Communication
OFFICE OF EDUCATION

EVALUATION ➤ PRACTICE

Effective dissemination, especially of research and development findings, can be a powerful force in advancing the cause of education. To facilitate communication between the researcher in the laboratory and the educator in the classroom, the Bureau of Research has inaugurated a special report service. These reports, prepared under USOE contracts, are interpretations of educational research and development directed at solutions to problems faced by the Nation's schools. Many State agencies and other groups concerned with education are participating in this service by repackaging and disseminating the reports to meet the needs of their local school districts. The cooperating agencies have been selected because of their strategic position in the educational community. Through this joint effort the Bureau of Research hopes to strengthen State and local educational information services and to speed the adoption of tested educational innovations.

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