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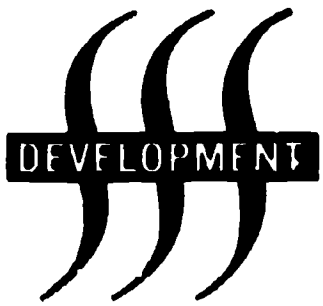
ABSTRACT

The "Journal on State School Systems Development" is an avenue for regularly incorporating into the available educational literature descriptive reports of studies, proposals, and legislative changes related to the legal or governmental structure within which schools are operated. Designed primarily for administrative groups, stdents of government, researchers, political scientists, legislators, study committees and commissions, State education agencies, and others interested in reorganization and the strengthening of school government, the journal's primary goal has been to keep the literature as current and up-to-date as possible. Articles presented in the Winter 1968, Vol. 1, No. 4, issue are: (1) "Wisconsin's New District Educational Service Agencies"; (2) "The Concepts and Problems of Planning-Programming-Budgeting System"; (3) "Population Characteristics and School District Planning"; (4) "The Multidistrict Local Education Agency"; and (5) "Selected Bibliography on Educational Organization and Reorganization." (NQ)

Journal on STATE SCHOOL SYSTEMS



WINTER 1968 ■ VOLUME 1 NUMBER 4

Journal on

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DEVELOPMENT

The JOURNAL is designed for the regular and orderly reporting of information and developments related to specialized school government as a system for accomplishing public educational purposes. Its issues include reports of state and federal legislative action, program implications, special projects, and research findings as well as discussions of intergovernmental relations and specific issues. It is not a spokesman for a single point of view. It serves instead as a printed forum for responsible contributors and a source of information for those concerned about school government, its objectives, and its productivity.

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Contents

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FOREWORD

THE *Journal on State School Systems Development* was conceived and initiated a little more than a year ago as an avenue for regularly incorporating into the available educational literature descriptive reports of studies, proposals, and legislative changes related to the legal or governmental structure within which schools are operated. Designed primarily for administrative groups, students of government, researchers, political scientists, legislators, study committees and commissions, state education agencies, and others interested in reorganization and the strengthening of school government, the publication's primary goal has been keeping the literature as current and up to date as possible.

Producing the *Journal* during this first year of its existence has been hampered by several major and wholly unanticipated setbacks. They have caused sufficient delays that the time period for the four issues of Volume I has been extended beyond the anticipated calendar year. Even more serious, they forced a most reluctant decision that continued publication of the *Journal* after the first year was not realistic. Only the assistance of persons having a high interest in the purposes to which the publication was directed and the contributions of countless hours of time have made it possible to continue production while also maintaining the standard of scholarship established in the earlier issues.

The reactions of subscribers to the announcement that the *Journal* was destined to be discontinued after only one year have been heartening. They are testimony that a void in the literature was being filled, that the content of the publication has been useful. It therefore becomes a distinct pleasure to report that even though shifts within the NEA make it impossible for the Department of Rural Education to continue as publisher of the *Journal*, it will not be terminated after all. The Center for Research in School Administration in the College of Education of the University of Iowa is taking up the slack and will be the publisher beginning with Volume II. To assist in the transition, it will be my privilege to work closely with the Iowa Center during the next year as it takes on this assignment.

ROBERT M. ISENBERG, Editor

WISCONSIN'S NEW DISTRICT EDUCATIONAL SERVICE AGENCIES

John R. Belton

IN THE PAST FIVE YEARS, Wisconsin has completed a total restructuring of its intermediate level of educational organization. After an operational history of more than one hundred years, the office of the county superintendent of schools was terminated and replaced with a statewide network of 19 Cooperative Education Service Agencies. With a similar or some other kind of intermediate level overhaul either contemplated or under study in a number of other states, a documentation of Wisconsin's experience and what the state has accomplished has broader importance.

A CHRONOLOGY OF LEGAL PROVISIONS

The constitution adopted by Wisconsin in 1848 when it achieved statehood gave to the legislature a distinct mandate to ". . . provide by law for the establishment of district-school which shall be as nearly uniform as practicable . . . free and without charge for tuition to all children between the ages of four and twenty years . . . and (without) sectarian instruction. . . ."[1] The constitution further included a provision which has permitted the legislature both to establish and to modify educational organization as needs and circumstances have changed. It specifies that "The supervision of public instruction shall be vested in a state superintendent, and such other offices as the

1. *Constitution of the State of Wisconsin*, Article X, sec. 3.

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legislature shall direct."[2] This provision gives the legislature broad authority for developing effective administrative arrangements for the provision of schools and to adapt or change them when it seems desirable to do so.

In terms of this authority that had been granted to it, the legislature in 1848 created in each town the office of superintendent of schools and gave all towns taxing power for the purpose of establishing and operating a school or schools. Town boards of directors and their town superintendents of schools proceeded with the task of dividing towns into suitable and appropriate school districts. From 1849 through 1861 more than 4,000 local school districts were created. The township system of school government was reasonably influential in initiating local provisions for public education. It was a beginning. And during this early development period, the town superintendent was the first intermediate unit administrator in Wisconsin.

In 1861, the state legislature authorized that the town superintendent be superseded by an office of county superintendent of schools. The law enacted provided that county superintendents be elected by the qualified voters of each county, the same manner in which the State Superintendent of Public Instruction was selected. The duties to be performed by county superintendents were explicit in the law.

It shall be the duty of every county superintendent:

1. To examine and license teachers in his district, and to annul certificates as provided by law.
2. To visit and examine each district, and all the schools in his district at least once a year, and as much oftener as may be necessary; to inquire into all matters relating to the management, course of study, mode of instruction, textbooks, and discipline of such schools, and the condition of schoolhouses, sites, and outbuildings and appendages, and of the district; to advise with and counsel the district boards in relation to the construction, warming and ventilation of schoolhouses, and the improving and adorning of the school grounds, and to recommend to school officers and teachers the proper studies, discipline, and management of schools.
3. To direct, after proper examination, the district board

2. Ibid., sec. 1.

to make any alteration and repairs which shall in his opinion be necessary to the health, comfort, and progress of the pupils, and to abate any nuisance in or upon the premises, providing the same can be done at an expense not exceeding twenty-five dollars. . . .

4. To organize and conduct at least one institute for the instruction of teachers in each year. . . .[3]

In carrying out these duties, county superintendents of schools took on all of the functions early performed by the town superintendent and/or secretary of the town board of directors as well as others. They encouraged the building and improving of schools, examined and certified teachers, and conducted in-service training sessions for teachers and school board members. By 1870, the superintendents in some counties had organized county teachers' associations, a few had helped in getting graded schools underway, and some were conducting teacher institutes for as long as a four week period.

As these developments took place, others closely related and significant also occurred. Legislation adopted in 1873 permitted the establishment of the position of city superintendent of schools and the employment of such an officer by city boards of education. This was followed in 1869 by legislation making all city school districts having a board of education and a superintendent of schools independent of the office of the county superintendent of schools. Also in 1869, the legislature made each town a single school district. The importance of this law was that it automatically placed all of the territory of the state in a school district. If a town had two or more districts, the law regarded them as "sub-districts."

In 1875, the legislature enacted provisions by which any town, village, city, or two or more adjoining school districts could, at the discretion of the voters, organize and operate one or more high schools. The board of education for such high schools as were formed were granted authority to levy taxes in the same manner as did the boards which governed elementary schools. The same law provided that every school in Wisconsin would be operated for a term of at least 13 weeks if such state financial support as was provided was to be claimed.

There is evidence in descriptive accounts of the early history

3. *Laws of Wisconsin Relating to Common Schools Including Free High Schools; also Relating to Normal Schools and the University.* Revised 1878. Sec. 461.

of education in Wisconsin of the struggle on the part of superintendents to exercise leadership and exert influence. In recommending an equalization law to provide aid to needy schools from the proceeds of a state tax for education, the state superintendent in 1880 stated that there was "undue local control" of school operation and suggested that the state be given the power to "direct . . . the policy which governs each school district." He specifically asked for trained help for the county superintendent in order to provide more effective supervision of the schools. Declaring the county superintendency "the most important office . . . in our public school system . . ." he deplored the practice of selecting these officials by popular election.[4]

The actual importance of the county superintendency as a representative of the state education department and as counselor and advisor of local schools did grow substantially over the years. This is evident in the reports of accomplishments and in the tendency to increasingly assign specific functions to the office. A recent historical account prepared by the Wisconsin Legislative Reference Bureau summarizes this period of development:

> By the turn of the century the responsibilities of county superintendents had grown so large that the Legislature authorized the appointment—with the approval of the county board—of a deputy superintendent by any county superintendent who had 100 or more schools under his supervision. The 1903 Legislature changed the time of election for county superintendents from the (partisan) election in the fall to the (nonpartisan) election in the spring. The same Legislature also made the city superintendency a full-time position and required city superintendents to have the same job qualifications as were required for principals of 4-year high schools.
>
> Professionalization of school administration developed rapidly during the 1905 to 1915 decade. In 1905, county superintendents were required to hold at least one school board convention each year; beginning in 1909 the law required county superintendents to attend at least one annual convention called by the state superintendent. In 1913, legisla-

4. Whitford, William C. *Wisconsin Superintendent's Report*. Madison: State Department of Public Instruction. 1880. p. 24-59.

tion created county boards of education, with broad school district reorganization powers and with the power to appoint assistant county superintendents aided by $500 in state funds.[5]

County school offices continued to grow in terms of their responsibilities and services. State law in 1915 provided that each county would have a supervising teacher. While the funds for the employment and services of these instructional specialists were provided directly and entirely by the state, their selection and appointment was delegated to a committee on common schools. These supervising teachers were placed under the direction of the county superintendent of schools in each county and they worked directly with teachers in local districts.

The county was the exclusive intermediate district in Wisconsin from the establishment of the county superintendency in 1861 until 1927 when a provision permitting modification was enacted. A law passed that year authorized the county board in any county having a population in excess of 15,000 to divide into two county superintendent districts. While this authorization did provide some degree of flexibility, it was seldom used. Much more important to the operation of the county intermediate unit offices was legislative enactment at the same time to make all city school districts independent of any form of county jurisdiction or control.

During its more than one hundred year history, the county superintendency made its greatest contributions to education by providing direct assistance and direction to teachers and the instructional program of smaller schools. A close second in importance was the leadership given to the process of reorganizing school districts. This was given special impetus in 1949 when the legislature established county school committees and assigned to them responsibility for developing a master plan for school district organization in each county and for filing this plan with the State Superintendent of Public Instruction. County superintendents of schools served as the secretary of the county committee. The effectiveness of the approach soon became evident. In the first ten years following the creation of county school committees, the number of school districts in the state was re-

5. Wisconsin Legislative Reference Bureau. *Public Education in Wisconsin.* 1966 Wisconsin Blue Book. Madison: the Bureau, 1966, p. 150-51.

duced from more than 6,300 to 2,904 and orders to further reorganize school districts were being issued regularly.[6]

The reorganization process was supplemented by a 1953 state law designed to eliminate the nonoperating districts by ordering them either to operate a school or be consolidated with an operating district. It was stimulated further when the 1959 legislature made it mandatory that all of the area of the state be included in a district operating a high school. A period of three years was specified as sufficient time to accomplish this unification. Where local action failed to accomplish the unification specified, authority to unify without further recourse to local referendum was given to the county school committees. Needless to say, reorganization moved forward in long strides.

The extensive school district reorganization which took place throughout the state changed circumstances within counties in a substantial way. Counties which previously contained 30, 60, and 90 or more school districts had been reorganized into only a few. One step to help strengthen this circumstance was legislation in 1959 which simplified the procedure by which two or more counties could share the same county superintendent. By 1965, there were 35 counties involved in this type of jointure, i.e., sharing a single county superintendent. One jointure consisted of five counties, another of four, and several of two or three. The system was awkward and unsatisfactory, however, and it was soon obvious that a more complete restructuring of the office of county superintendent would be necessary.

Studies, observations, the experience of other states, and the need to restructure the state's middle echelon of school organization led the State Superintendent to establish a special committee to make a thorough study of what existed and how it might be corrected. The recommendations of this committee, with modifications acceptable to the legislature, were enacted into law on June 12, 1964.[7] This legislation provided that all county superintendents offices would be abolished at the expiration of the term of incumbent superintendents—July 1, 1965. It further established procedures for the creation and operation of "not more than 25" Cooperative Educational Service Agencies. These new regional agencies were to meet criteria adopted by a special state committee. The result was a statewide network of

6. The state had a total of 494 legally constituted school districts on September 1, 1967.

7. *Laws of Wisconsin, 1953.* Chapter 565.

19 units which became operative on the same date the county school office terminated. During the nearly three years that have since passed, only glimpses of the potential educational service these agencies might provide has been observable. Most is yet to be realized.

The chronology of legal provisions for an intermediate education agency in Wisconsin covers a period of approximately 120 years. While the major highlights are identified in the foregoing paragraphs, a more complete annotated documentation summarizes this segment of the state's educational and legislative history:

1848 Wisconsin became a state. The Constitution provided for public schools and for a State Superintendent of Public Instruction.
The first legislature established the Office of Town Superintendent and each town became a taxing unit for school purposes.

1861 The office of the Town Superintendent was abolished by the legislature and replaced with the County Superintendent, elected by the people.

1863 Establishment of the office of the City Superintendent was permitted.

1869 All cities with a City Superintendent of Schools were made independent of the County Superintendent's Office, including county support and supervision.

1885 The State Superintendent was required to hold at least four conventions in as many parts of the state to advise the County Superintendents in regard to supervision and the management of schools.
The law required that "No County Superintendent of Schools shall engage in any profession or occupation which will in any way interfere with the proper discharge of his duties as County Superintendent of Schools."

1895 The Law required that a County Superintendent have a teaching certificate and a minimum of eight months experience as a teacher.

1901 A County Superintendent having more than 100 schools under his jurisdiction was allowed a deputy.

1905 County Superintendents were required to hold at least one school board convention a year.

1913 County Boards of Education were created. These Boards were given broad powers for school district reorganization and the power to appoint Assistant County Superintendents.

1915 The Country Board of Education law was repealed and a Committee on Common Schools was created and given permission to appoint county supervising teachers whose salaries came from state funds.

1923 The authority to appoint county supervising teachers was given to the County Superintendent of Schools.

1927 Counties with a population of more than 15,000 were permitted to have two County Superintendent Districts. City school systems were made completely independent by removing them from the jurisdiction of the County Superintendents.

1951 City school boards were authorized to contract with the County Superintendent's Office for special services.

1959 All areas of the state were required to become part of a district operating a high school. In addition, a procedure for two or more counties to share the services of a single County Superintendent of Schools was established. Candidates for office of County Superintendent were required to hold a school administrators license.

1961 The state reimbursed counties up to 20 percent of the County Superintendent's salary under certain conditions.

1963 Cooperative Educational Service Agencies were established to replace the County Superintendencies as of July 1, 1965. The Agencies served all school districts in the state regardless of the size or type of a school district.

STUDIES SUPPORT INTERMEDIATE UNIT REORGANIZATION

Legislative enactments, especially those eliminating a century-old agency and providing a statewide governmental reorganization, are seldom adopted on the first attempt or without a substantial base of study and support. On both these counts, the reorganization of Wisconsin's intermediate units followed the typical pattern. A series of studies and a comparable series of unsuccessful legislative efforts preceded what ultimately became Chapter 565, Laws of 1963, establishing a statewide network of

Cooperative Educational Service Agencies.

With continuing progress in the reorganization of local school districts and consequent removal of much of the reorganized area from the jurisdiction of the county school office, county superintendents were increasingly aware that their future was more positive in the area of providing specialized educational services than in the exercise of direct administrative authority. In some counties service programs had proved to be effective. So were similar programs that were being developed in other states. To pave the way for possible developments of a service nature, the Wisconsin County Superintendents Association undertook in 1963 an action research investigation. Basically, they attempted to find out what services county school offices were providing, how the services provided were financed, what additional services county superintendents felt were most needed, and how they felt the entire service program could be improved. With the additional involvement of representatives of the Wisconsin State Department of Public Instruction, the University of Wisconsin, and the Wisconsin School Boards Association, many aspects of the service potential of the county office were explored. The general conclusion was that there existed great discrepancies among counties with regard to the services provided. Those counties having the greatest wealth seemed unquestionably to have access to the largest number of special services.

With completion of the study in 1954, the Wisconsin County Superintendents Association formally requested the State Department of Public Instruction and the University of Wisconsin to conduct an investigation which would provide a basis for making intelligent judgments concerning the future of an intermediate administrative unit in the state. An outcome of the initial discussion of this request was a conviction that the matter to be studied was by no means limited in either importance or concern to county superintendents. It was then that the interest and participation of all school administrative organizations, teachers, and school boards, as well as both the University and the State Department, were enlisted and a cooperative study undertaken. Each cooperating group contributed financial aid for the study; additional support was obtained from the Midwest Administration Center at the University of Chicago.

As the study developed, it undertook testing two specific hypotheses. The first was: *An administrative unit between the*

state and the local districts is needed to aid in providing the optimum educational program for Wisconsin's youth. If this hypothesis was accepted, the second was: *The county school superintendency as now constituted is adequate to aid in providing for the optimum educational program.* If the second hypothesis was rejected and the existing county superintendency found inadequate, some other administrative unit between the state and local school districts would be needed. It was to be at that point that the study would take on the function of a study team and suggest criteria for intermediate administrative units that would help provide an optimum educational program.

The conclusions of the two-year study were that: (1) an administrative unit is needed between the state and the local district to assure provision of an optimum program of educational services; (2) the county superintendency as presently constituted in Wisconsin is not adequate to aid in providing an optimum educational program; and (3) the state should be organized so that all of its territory would be included in a satisfactory intermediate administrative unit. The study further identified criteria or characteristics to be applied in the development of "satisfactory intermediate administrative units." Among them were a minimum school enrollment of 10,000 pupils, boundaries that followed a logical combination of local school districts, an elected board of education which would appoint the intermediate superintendent, fiscal independence and taxing power, and a major emphasis on educational leadership and services.

The study recommended specific legislation and a positive step forward was taken by the state's 1957 Senate and Assembly with the appointment of an interim legislative committee to review the study and bring its conclusions back to the full legislative bodies in the form of a specific proposal. The interim committee completed its assignment in time for the next legislative session. But, because of certain mandatory features included in the bill developed as well as other concerns, it failed to receive the hoped for support of local school administrators, local school boards, and municipal authorities, and it could not pass.

Partly as a result of concerns generated by the interim committee's legislative proposal, the Wisconsin Association of School Boards established a special committee in 1958 to study the intermediate school district. Included in the findings and recommendations the committee reported to the Association's 1959 Convention were a reinforcement of the merits of an inter-

mediate level of educational administration for the state, indication of the inadequacy of the office of the county superintendent of schools as presently constituted to serve this role, and belief that the legislation proposed by the interim committee (and at the time still pending) was unacceptable to local school boards because it contained mandatory features. The committee report further suggested that the name "intermediate district" had a certain stigma and that a name suggesting cooperation or cooperative services would be more acceptable.

With failure to enact the bill developed by the interim committee at the 1959 legislative session, the legislature appointed another committee to study the county superintendency. Early in 1960, members of this special advisory committee were appointed. They included one member representing county boards of supervisors, three county school superintendents, one local school district administrator, two local school board members, one municipal official, and three members of the legislature's Education Committee. Although several meetings of this advisory committee were conducted, no agreements regarding either the role or the future of an intermediate unit were reached. The committee's final report and recommendations contained no specific support for reorganizing, continuing, or eliminating the county superintendency. It was limited to the suggestion that there be further evaluation of the situation. Meanwhile the reorganization of local school districts and removal of territory from county superintendent purview continued. So did the joint agreements among counties with respect to sharing a county superintendent.

On taking office in 1961, a newly elected State Superintendent of Public Instruction called together a representative statewide committee to make recommendations for legislation which would provide a new structure to succeed the county superintendent and which could be submitted to the 1963 legislature for consideration. After slightly more than a year of study and deliberation, the committee's findings were placed before the legislature.[8] The committee then took on the function of rallying support for the proposal. The legislation enacted in June of 1964 created service units "as a convenience for local districts in cooperatively providing special educational services."

8. The recommendations of the Committee were incorporated into Assembly Bill 254 and introduced by a group of 14 Assemblymen on February 19, 1963. Upon enactment on June 12, 1964 it became Chapter 565, Laws of 1963.

The major provisions of the law procedures by which the state would be subdivided into "not more than 25" Cooperative Educational Service Agencies became operative on July 1, 1965, coincident with the expiration date of the then existing terms of all county superintendents. On that date the more than one-hundred year old county superintendency was terminated. Of particular importance in guiding the creation of the new CESA units were certain specific guidelines and criteria adopted by the state committee. Among them were the following:

—Each agency will follow the boundary lines of local school districts without regard to municipal boundaries; each shall consist of contiguous school districts to form an area which will be as compact as possible.

—All territory in the state will be included in a specific agency.

—Each agency, to the extent possible, should have a maximum radius of 60 miles, a minimum enrollment of 25,000 pupils; in no instance, however, should the geographic size or number of pupils inhibit the optimum involvement of each local school district.

—Each agency should be a cohesive unit made up of local districts having a high degree of common orientation, compatability, and interests.

—The area of each agency should include at least one state supported degree granting institution of higher learning and/or extension center and an approved associate degree granting school of vocational, technical, and adult education.

With such guidance, the state committee headed by the State Superintendent set about the task of delineating discrete agency areas.

THE NEW COOPERATIVE EDUCATIONAL SERVICE AGENCIES

Wisconsin's new cooperative agencies all came into existence at the same time and, in terms of the way they are organized and function, are somewhat unique among the various newly reorganized intermediate education agencies developing in a dozen or more states throughout the country. Since they have

no regulatory authority, their complete orientation and purpose is with educational services. The brief description of their organizational and operational characteristics which follows gives some indication of their service potential as well as some of the difficulties they might encounter as they attempt to achieve this potential.

Working with the guides adopted to assist with the determination of school district clusters and boundaries, the special state committee held a series of hearings in the different geographical areas of the state and then adopted a plan for 19 Cooperative Educational Service Agencies. All territory in the state was divided among these 19 units. The median total school enrollment of all districts in these service areas at the time they began operating was slightly less than 36,000 pupils. Their total number of school districts ranged from a low of 14 in CESA No. 17 to a high of 57 in CESA No. 16; the median number of local school districts for all the agencies was 25. Certain specific data for each of the 19 agencies and a map of the territory each includes are given in Table 1 on page 216 and in Figure I on page 217.

The law creating the cooperative agencies establishes two separate policy and program determining bodies for each unit. The governing body is an 11 member Board of Control made up of elected members of local school district boards of education and selected by the boards of the constituent local districts as their representatives. By law, then, members of the Board of Control are at the same time members of a local school district board. The other body is an Advisory Committee made up of local school district administrators. The chief administrator (superintendent or principal) in each school district within the area of each agency is automatically a member of that agency's Advisory Council to the Board of Control.

Such service programs as an individual CESA might undertake are provided at the request of local districts on a contract basis. Service personnel employed by the agency are directly responsible to both the districts in which they serve and to the agency itself. Of particular importance, the cooperative agency and its Board of Control do not have authority to initiate service programs. Initiation as well as provision of the funds necessary to operate programs must come from local school districts. It is the function of the Board of Control to appoint and contract with an agency administrator, however. This administrator has the legally desig-

TABLE 1

NUMBER OF SCHOOL DISTRICTS, COUNTIES, AND STUDENTS IN AREA OF COOPERATIVE EDUCATIONAL SERVICE AGENCIES

AGENCY NUMBER	NUMBER OF SCHOOL DISTRICTS[1]	NUMBER OF COUNTIES[2]	TOTAL STUDENT ENROLLMENT[3]
1	20	5	18,274
2	41	6	23,517
3	20	6	21,206
4	28	5	25,261
5	20	4	21,454
6	30	4	34,923
7	25	3	42,883
8	17	3	47,992
9	34	3	37,291
10	20	3	35,809
11	25	5	35,632
12	24	7	28,597
13	17	2	29,325
14	48	5	27,222
15	34	2	64,196
16	57	2	60,901
17	14	2	38,236
18	53	3	70,670
19	25	2	195,782
Total	552	72	859,101

1. *Number of districts indicated is the total as of July 1, 1966.*
2. *Agency boundaries follow school district rather than county boundaries. Therefore, number of counties in each CESA is an approximation.*
3. *Enrollment figures are for the 1965-66 school year.*

nated title of Coordinator.

Other characteristics of the cooperative agencies as specified in the law follow.

—Each agency is supported by an annual state appropriation not to exceed $29,000. This modest sum is provided ". . . for maintenance and operation of the agency. . . ." It is a basic operational nucleus and is not intended for providing more than a coordinating function. It is the limit of direct state support.

NINETEEN AREA PLAN ADOPTED BY THE STATE COOPERATIVE EDUCATIONAL SERVICE COMMITTEE, WISCONSIN

—Agencies may incur short term debt but do not have taxing power. All funds for services result from contractual agreements with local school boards within the area.

—Local school districts are not required to contract for any service that might be provided on a cooperative regional basis. They remain completely autonomous with respect to participation. A school district may not be assessed for services for which it has not contracted nor can state support be withheld because it elects not to participate in a cooperative program.

—The agency's Board of Control determines each school district's pro-rata cost as agreed upon in the contract with the agency for a particular service.

—The boundary lines of any agency can be changed upon the approval of an appeal to the State Superintendent of Public Instruction.

The new Cooperative Educational Service Agencies are based on the concept that certain services and functions can be provided and performed more adequately and efficiently on a larger geographical and population base than is characteristic of most school districts. Their purpose is the expansion, upgrading, and equalizing of educational programs throughout the state. Their creation and operation combine a minimum financial obligation on the part of the state, virtually complete freedom of choice on the part of each local school district, and, at the same time, significant potentialities in terms of service and economy. A comparison of the legal differences provided in the new type intermediate unit and the now extinct office of county superintendent of schools which it replaced is shown in Table 2 on pages 219, 220, and 221.

CONCLUSION

The Wisconsin legislature established an intermediate or middle echelon agency to assist with school operation during its first session after becoming a state in 1848. That structure was modified and the office of county superintendnt of schools was established in 1861. That a reorganization of this agency would ultimately be necessary was assured as early as 1863 when legislation enacted made cities independent from any legal relationship with the county school office. This provision gave the

TABLE 2

A COMPARISON OF DIFFERENCES BETWEEN THE OFFICES OF COUNTY SUPERINTENDENT OF SCHOOLS IN WISCONSIN PRIOR TO JULY 1, 1965 AND THE COOPERATIVE EDUCATIONAL SERVICE AGENCIES WHICH REPLACED THEM.

	COUNTY SUPERINTENDENT SYSTEM	COOPERATIVE EDUCATIONAL SERVICE AGENCY SYSTEM
Policy Making	County Board of Supervisors (Education Committee)	Board of Control not to exceed 11 local school board members
Advisory Group	Some counties have self-established advisory groups	Highest professional administrator of each district is a member of advisory group
Taxing Power	County board passed on budget and authorized levy	None
State Aids	Portion of county superintendent's salary, supervising teachers' salaries	$29,000 per agency per year if used. School districts eligible for aids under equalization formula
County Aid	$350 per elementary teacher	$350 per elementary teacher
Professional Employees	County superintendent Supervising teachers Special teachers	Coordinator
Handicapped Children's Program	County handicapped children's board	County may continue program of handicapped children's education. Board independent of agency. May assign functions to agency or contract with agency.
Handicapped Children's Education Board, Officer	County superintendent was secretary	Member of board is elected secretary
County School Committee	County superintendent was secretary	Continues with coordinator as secretary

	COUNTY SUPERINTENDENT SYSTEM	COOPERATIVE EDUCATIONAL SERVICE AGENCY SYSTEM
County Home for Dependent Children	Supervised by county superintendent	Supervised by coordinator
Certification of full valuations of school districts	State Superintendent certified to school district clerk and county superintendent. County superintendent certified valuation to joint districts.	State Superintendent certifies to school district clerks
Educational leaders visit schools. Inquire into matters of instruction, records, discipline. Keep informed about new techniques. Advise school boards and teachers as to their duties. Make reports and investigations required by State Superintendent.	County superintendent	
Services.	County superintendent could supply services to schools not under his jurisdiction on a contract basis	Provide cooperatively special educational services to teachers, students, school boards, administrators, and others
Repair of school buildings	County superintendent to direct school boards to make repairs	
Annual report to County Board on condition of schools	County superintendent	
Name rural school houses	County superintendent	Local school board
Sending report blanks to local boards	County superintendent	State Superintendent

	COUNTY SUPERINTENDENT SYSTEM	COOPERATIVE EDUCATIONAL SERVICE AGENCY SYSTEM
Taxation of territory attached to city district	City clerk based taxation rate on valuation certified by county superintendent	City clerk notified directly by State Superintendent
Report of absences	Report to the county superintendent in one- and two-teacher schools	Report to the truant officer (local administrators)
Employment of clerical help	County superintendent employed on authorization by county board of supervisors	As authorized by agency's board of control
Reports to State of Handicapped Children's Board	County superintendent, executive officer or treasurer	Executive officer, treasurer
Report names of handicapped children	County superintendent	Local district administrator
County College Board	County superintendent and two other members elected by the county board	Three members elected by county board
County College Board Secretary	County superintendent	Board elects one of its members
School census report to State	County superintendent	Local district administrator
Distribution of township library fund books and notification of receipt	County superintendent and local administrator. Clerk's notification of books received was sent to county superintendent	Local administrator clerk's notification of books received directly to contract dealer
Certification of county aid to districts lying in more than one county	County superintendent	Local district administrator (This could mean union high administrator should certify in cases of districts with no administrator)
Cooperation with Cooperative Extension Service	County superintendent	Coordinator of agency

county superintendency an almost exclusive orientation. When it became increasingly necessary during the 1950's and since to overhaul the structure of local school districts, much of each county's rural territory was included by reorganization with city districts. The service area of the county school office eroded away quickly.

The obviously necessary reorganization was made effective in 1965 in the form of 19 Cooperative Educational Service Agencies. This new intermediate structure differs in its conception from that developing in most other states. It is designed not as an agency for providing services but to facilitate and coordinate the development of multidistrict service programs over which it exercises little control or direction. The agency is a catalyst. It is conceived as organizational machinery to make regional service programs available while permitting local school districts to maintain complete autonomy. This concept was clearly set forth in a descriptive statement presented at a conference sponsored by the U.S. Office of Education in 1966:

> The Cooperative Educational Service Agency structure is an experiment typically sensitive to the principle that local school decisions are properly made at the local school district level. No taxing power, no regulatory power, no pleasant prospect of added state aids encourages its utility. Its appeal lies in the fiscal and educational advantages that cooperation makes possible to school districts. Its utilization and effectiveness can become an indication of the extent to which local school officials prize and prove the value of the decision-making power in their hands.[9]

It is still too early to tell with certainty if the Cooperative Educational Service Agencies are fulfilling their purposes or if they will ever come near reaching their potential. One thing is clear, however. The success of this new venture in education for Wisconsin rests almost entirely upon the interest, desire, and willingness of the local school districts throughout the state to utilize the material and personal resources they have available on a regional basis through cooperation. The agency has no alternatives for success.

9. Olson, H. A. "Wisconsin's Intermediate Unit—The Cooperative Educational Service Agency." Unpublished paper presented at a Conference on Reorganization and the Intermediate Unit, Harrisburg, Pennsylvania, April 21, 1966. p. 8.

The Concepts and Problems of

PLANNING-PROGRAMMING-BUDGETING SYSTEM

George A. Chambers

CHARLES DUDLEY WARNER'S often quoted statement, "Everyone talks about the weather but no one ever does anything about it", is, to a degree, analogous to the development of Planning-Programming-Budgeting Systems. Everyone is talking about a PPBS but few are doing anything about developing it.

The major reason for so much talk about PPBS, without much specific action resulting, is that the concepts and ramifications of PPBS are relatively unknown in education. When they do become known, state educational agencies may or may not desire to support the development of PPBS in local school districts. This paper is directed toward assisting state education agency personnel as they attempt to clarify their position relative to PPBS for local school districts.

UNDERSTANDING PPBS

An undertanding of PPBS may be gained in part from a study of its historical development, its underlying concepts, and its definition of terms. Conflicting opinions with regard to the meaning of PPBS and its potential for education make such a multiple approach to understanding essential.

Historical Developments

The popular notion that PPBS is a creation of the Department

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of Defense is not well founded. Rather, PPBS appears to have emerged from three distinct sources—from private enterprise, from the federal government, and from an evolution of budget practices.

In industry, antecedents of what we now think of as PPBS can be traced back to 1915 when the E. I. duPont de Nemours & Co. invested in General Motors. There is evidence that at this time duPont introduced into General Motors its concepts of establishing objectives, forecasting, planning for the future, and developing standards and output measures. All of the above characteristics are components of PPBS.

Efforts to establish PPBS in the federal government can be identified as early as 1942, when it was introduced as part of the War Production Board's wartime control system. The Control Materials Plan developed by that agency during World War II was one of the earliest attempts, if indeed not the first, to introduce PPBS into federal government operations. Although the Control Materials Plan did not express dollar amounts (copper, steel, aluminum, and other critical materials were expressed), it identified major goals, established program objectives, divided program objectives into program elements, projected over a period of time, and examined and analyzed alternative plans.

Much of the current impetus to apply the concepts and procedures of the Department of Defense's Planning-Programming-Budgeting System to all federal agencies was launched by President Johnson in August 1965. At that time, in a statement to members of his cabinet and agency heads, the President declared: [1]

"The objective of this program is simple: To use the most modern management tools so that the full promise of a finer life can be brought to every American at the least possible cost. . . .

Once in operation, it will enable us to:

1. Identify our national goals with precision and on a continuing basis.
2. Choose among those goals the ones that are most urgent.
3. Search for alternative means of reaching those goals most effectively at the least cost.

1. Exton, Elaine. "Federal Program Budget Is a Step Toward Centralized Education Planning." *The American School Board Journal.* 153:39; November 1966.

4. Inform ourselves not merely on next year's cost—but on the second, third, and subsequent year's costs of our programs.
5. Measure the performance of our programs to insure a dollar's worth of service for each dollar spent."

An analysis of the various budget reform efforts in the United States shows that they have evolved through two distinct stages and are now entering a third. The first stage emphasized *central control* over spending and the objects of expenditures. The second stage emphasized *efficiency* in the performance of work and other prescribed activities. The performance budget, recommended by the Hoover Commission, was oriented toward management and cost effectiveness. The third stage of budget reform, introduced by the Department of Defense, emphasizes *long-range planning*. It has its basis in economics and systems analysis, and measures future costs heretofore overlooked or underestimated. The third stage of budget reform is PPBS.

Concepts Underlying PPBS

While many of our colleagues in education have a vague understanding that some kind of orderliness and sequence are implied in PPBS and will admit that generally these are acceptable and even desirable characteristics, few have been willing to probe deeply enough to find that PPBS is based on familiar concepts rather than some type of mysticism. The concepts involved and the procedures required are far too logical and practical for the present lack of understanding to persist.

The conceptual framework for the program budget at the federal level has been described as follows:[2]

1. Appraisals and comparisons of various government activities in terms of their contributions to national objectives.
2. Determination of how given objectives can be attained with minimum expenditures of resources.
3. Projection of government activities over an adequate time horizon.
4. Comparison of the relative contributions of private and public activities to national objectives.

2. Smithies, Arthur. "Conceptual Framework for the Program Budget." *Program Budgeting*. (Edited by David Novick.) Cambridge: Harvard University Press, 1965. pp. 26-27.

5. Revision of objectives, programs, and budgets in the light of experience and changing circumstances.

From such a conceptual framework it can be concluded that PPBS keys upon the determination and subsequent revision of objectives, alternatives, inputs, costs, time dimensions, and outputs.

In the now famous Bureau of the Budget *Bulletin No. 66-3*, the operational design and conceptual framework for PPBS at the federal level was clearly established:

Basic concepts and design

a. The new Planning-Programming-Budgeting System is based on three concepts:

1. The existence in each agency of an *Analytic* capability which carries out continuing in-depth analyses by permanent specialized staffs of the agency's objectives and its various programs to meet these objectives.

2. The existence of a multiyear *Planning and Programming* process which incorporates and uses an information system to present data in meaningful categories essential to the making of major decisions by agency heads and by the President.

3. The existence of a *Budgeting* process which can take broad program decisions, translate them into more refined decisions in a budget context, and present the appropriate program and financial data for Presidential and Congressional action.

b. Essential to the system are:

1. An output-oriented (this term is used interchangeably with mission-oriented or objectives-oriented) program structure (sometimes called a program format) which presents data on all of the operations and activities of the agency in categories which reflect the agency's end purposes or objectives. . . .

2. Analyses of possible alternative objectives of the agency and of alternative programs for meeting these objectives. Many different techniques of analysis will be appropriate, but central should be the carrying out of broad systems analyses in which alternative programs will be compared with respect to both their costs and their benefits.

3. Adherence to a time cycle within which well-considered information and recommendations will be produced at the times needed for decision-making and for the development of the President's budget and legislative program. . . .

4. Acceptance by line officials (from operating levels up to the agency head), with appropriate staff support, of responsibility for the establishment and effective use of the system.

c. The products of the system will include:

1. A comprehensive multiyear *Program and Financial Plan* systematically updated.

2. *Analyses*, including program memoranda, prepared annually and used in the budget preview, special studies in depth from time to time, and other information which will contribute to the annual budget process.

d. The overall system is designed to enable each agency to:

1. Make available to top management more concrete and specific data relevant to broad decisions.

2. Spell out more concretely the objectives of government programs.

3. Analyze systematically and present for agency head and Presidential review and decision possible alternative objectives and alternative programs to meet those objectives.

4. Evaluate thoroughly and compare the benefits and costs of programs.

5. Produce total rather than partial cost estimates of programs.

6. Present on a multiyear basis the prospective costs and accomplishments of programs.

7. Review objectives and conduct program analyses on a continuing, year-round basis, instead of on a crowded schedule to meet budget deadlines.

e. The entire system must operate within the framework of overall policy guidance—from the President to the agency head, and from the agency head to his central planning, programming, and budgeting staffs and to his line managers. Fiscal policy considerations and other aspects of Presidential policy will be provided by the Bureau of the

Budget in accordance with the President's program. Modifications will also have to be made from time to time to reflect changing external conditions, Congressional action, and other factors.[3]

Definitions for PPBS

It becomes immediately apparent that semantic barriers may stand in the way of a ready understanding of PPBS. This is somewhat paradoxical in that the precise use of basic terminology contributes to a consistency in meaning. A problem of word meaning does exist, however, and to assist in overcoming this difficulty, the following definitions are offered.

PROGRAM is a cluster of activities designed to achieve specific objectives over a multiyear period.

PLANNING is the determination of what could be done over a multiyear period to achieve the objective of a program.

BUDGETING is the estimation of costs over a multiyear period to achieve program objectives.

SYSTEM is an assembly of procedures, processes, methods, routines or techniques united by some form of regulated interaction to form an organizational whole.

ANALYSIS is an analytic examination of a program and its activities, procedures, processes, methods, routines, and techniques.

EVALUATION is an appraisal of program objectives and program accomplishments.

Based on the above definitions, a Planning-Programming-Budgeting System is the assembling and implementation of procedures whereby the objectives of a cluster of activities and the alternatives for achieving those objectives over a multiyear period are determined, analyzed, evaluated, costed, and selected.

It should be noted that analysis and evaluation must be included in a precise definition of Planning-Programming-Budgeting System. Therefore, it would seem that considerable confusion could be avoided and a more explicit meaning could be obtained by referring to the system as a Planning-Programming-Budgeting-Analysis-Evaluation System.

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3. U. S. Bureau of the Budget. "Planning-Programming-Budgeting." *Bulletin 66-3:* 2-4; October 12, 1965.

BENEFITS OF PPBS

The benefits a Planning-Programming-Budgeting System may offer to local school districts in future years appear to be virtually without limit.

An identification of some of what might be a result was included in a recent bulletin of the New York City Public School System. That statement expressed belief that "a properly implemented PPBS system will produce several tangible management benefits."[4] Its authors regarded the following as among the most important contributions PPBS is likely to make:

—Facilitate the whole managerial decision process through the provision of system, discipline, and improved information flow.

—Provide school officials and administrators with total current and future resource implications of alternative courses of action.

—Utilize the time of senior officials more effectively by enabling them to focus on major objectives, policies, and resource decisions.

—Enable early identification of potential problems and reduce the likelihood of crisis management, through improved planning and forecasting.

—Define and integrate management information needs and improve the development of data systems to meet these needs.

—Improve program justification to higher authorities, and therefore assist in competing for city, state, and federal funds.

Facilitate community relations by improving visibility of objectives and the resources available to accomplish these objectives.[5]

While each of these benefits has operational significance for schools, many others could be added to the list. A substantial beginning is offered in an unpublished position paper developed

4. New York City Public Schools. *"An Introduction to the Planning-Programming-Budgeting System in the New York City Public School System."* New York City: Board of Education, June 1967. p. 6.

5. *Ibid.*

for staff use within the U. S. Office of Education. The paper sets forth seven additional benefits of PPBS to supplement those listed above:

—*Improved assessment of the efficiency of allocation of educational resources*

A better job can be done in the assignment and utilization of staff, plant, equipment, supplies, and funds to accomplish what is believed worth accomplishing.

—*A more continuous and consistent consideration and review of educational objectives*

Planning, budgeting, and accounting for expected accomplishment virtually forces attention to objectives.

—*Sharper and more consistent examination of essential sequence of educational development*

Education tends to be highly sequential. Sequences within and among "programs" are much more easily observed, studied, and managed when there is deliberate planning, budgeting, and accounting for each "program."

—*More effective communication through all levels of management concerning processes and operations as they relate to the achievement of objectives*

One of the most difficult processes in school system management — often the most neglected — is communication. Ready access to mechanisms which permit communications processes to function upward, downward, and laterally within the organization is essential for effective operation. With "programs" identified and planned through staff involvement, budgeted for with an understanding of what is economically feasible, and accounted for in terms of the way resources are committeed to the achievement of objectives, there is something definite to communicate about.

—*Better understanding of how educational resources and effort relate to accomplishment*

If schools operated in the manner of business and industry, more money and more effort would result in more effective education. Ironically, education has seldom shown clearly that a commitment of more resources will, in fact, result in improved accomplishment. With "programs," the opportunities to clarify this relationship are at their best.

—*Disclosure of the kinds of educational programs possible when resources are limited*

Too often, the statement "we have a good school system" implies that the system is meeting more needs than it really is. Frequently, too, a system is criticized for not providing certain kinds of educational programs which are not possible for lack of available resources. When "programs" go through the process of planning, budgeting, and accounting, the kinds of educational realities are made clear and a better school system is possible.

—*Better opportunity to set educational priorities*

Seldom does a school system have sufficient staff and resources to do all that needs to be done. Establishing priorities is essential. "Programs" brings these into focus by providing those responsible for making decisions a basis for determining importance in view of resources available.[6]

A review of such benefits as have been identified show that PPBS can be a catalyst and a vehicle for improving the inputs, processes, and outputs of a local school district. The full potential has never yet been fully explored.

PROBLEMS AND ISSUES OF PPBS

The potential problems and unresolved issues inherent in PPBS are, like the potential benefits, virtually unlimited. Some stem from a lack of conceptual clarity and others from operational alternatives. Because these problems and issues must be faced if PPBS is to become a reality, a few of those readily apparent are here identified.

Conceptual Problems

A major problem of nearly every new and innovative system or idea is the tendency for it to be differently understood by those who come in contact with it for the first time. This is unusually characteristic of the concepts of PPBS. Still in its early years of development, PPBS is interpreted in many ways and means different things to different people.

Some consider PPBS as an approach requiring little more than

6. Lichtenberger, Allan R. "Program Planning, Budgeting, and Accounting in School System Operation—A Position Paper." Washington, D. C.: September 1967. pp. 3-5. (Mimeo.)

a restructuring of the budgeting and accounting precedures—creating new budget categories for the accumulation of costs. While this is generally regarded as a logical and practical way to begin PPBS in the field of education, the mere restructuring of categories is seldom likely to yield what can be considered a "program-oriented budget system." Most of the categories to be found built into such an approach—administration, teaching, science instruction—are inputs rather than outputs of the system. While the establishment of new categories might well provide better opportunities for analysis and assessment, the approach can hardly be regarded as a Planning-Programming-Budgeting System. In most cases the input categories will be organized around the existing administrative and curriculum patterns in the school.

PPBS is regarded by others as a "cost-utility analysis system" —a system which measures the relationship of input to output. The emphasis of this approach is on efficiency. This is certainly a desirable objective, but it results from an extremely narrow and limited concept. It involves equating PPBS with budget performance, which is only a small portion of what should be included.

There are some people who regard PPBS merely as a long-range budget plan. They tend to view the alternative choices to be made in PPBS as little more than the alternatives that would likely arise from any multiyear budget forecasting. Such a concept relates only to the conventional long-range budgeting procedures and not to PPBS where the alternatives derive from objectives, inputs, processes, outputs, time dimensions, and other variables.

Still others conceive PPBS as an information reporting system that provides the basic data needed for decision making. Such an information system would require a sufficient reorganization of the operational structure to make certain that functions would be closely within the jurisdiction of those making decisions. Such a relationship of control is indeed part of the PPBS concept. But an information system alone should not be considered a system for Planning-Programming-Budgeting.

Perhaps the most difficult and troublesome of all the conceptual problems results from the different ideas and interpretations which tend to be built into the definition of a "program." One PPBS meaning for a "program" ascribes to it "nothing less than the definition of the ultimate objectives . . . as they are realized

through operational decisions."[7] Acceptance of such a definition raises many pertinent questions. Mindful that many local, state, and national statements of educational goals, objectives and priorities have been formulated and set forth throughout the years, it still becomes necessary to ask such questions as the following:

* Is there a set of objectives for elementary and secondary education that is acceptable by all or a majority of educators, board members, parents, and other citizens?
* Are the objectives for elementary and secondary education precise enough for use in PPBS?
* If there is *not* a set of acceptable and precise objectives for elementary and secondary education, can such a set be developed?
* If there *is* a set of acceptable and precise objectives for elementary and secondary education, would planning, programming, and budgeting by those objectives require either a different orientation or a reorganization of public education? For example, if one state objective is the development of a skill in reading, should a formal horizontal organization through the school system for reading be established?
* If there is a set of acceptable and precise objectives for elementary and secondary education, could budgeting by those objectives be accomplished? For example, if social development is an objective, would it be possible for monetary amounts to be estimated and accounted for under social development activities?

While it would be inappropriate to minimize the importance and complexity of these conceptual problems, it would be equally unfortunate to suggest that they and numerous others which might be identified cannot be resolved. It can further be determined that satisfactory solutions would be generally beneficial in the advancement of education. It is reasonable to assume, for example, that if our schools would plan, program, analyze, evaluate, and budget over a multiyear period of time for an objective

7. Ashen, Melvin. "The Federal Budget as an Instrument for Management and Analysis." *Program Budgeting*. Cambridge: Harvard University Press, 1965. p. 18.

as the development of reading skills throughout each student's total educational experience, there undoubtedly would be a significant improvement in the level of reading skill developed. It has to be demonstrated over and over again that improvements take place wherever the emphasis is given. One only needs to recall the curriculum in mathematics and science prior to Sputnik and the NDEA for documentation.

Operational Problems

Not all the problems associated with PPBS are conceptual. Mere planning for implementation creates others and raises a number of questions for which ready answers are lacking. One such question involves the specific agency or level of the educational organization which should appropriately be responsible for the development of a system of Planning-Programming-Budgeting. Should it be undertaken by the local school district? By each and every local school district? By a regional agency or cooperative arrangement involving a number of school districts? On a statewide basis? Perhaps, even, through contracting with a private vendor who just happens to be in the business? Obviously, such questions tend to have something of a philosophical orientation.

It will be recalled that the term "program" as used in this discussion refers to precisely stated objectives. It follows, then, that questions regarding who should assume responsibility for developing PPBS can be rephrased as where the responsibility for determining the objectives of education should be placed. Additional questions about the respective roles of our federal, state, and local education agencies are thus imposed. And again, workable solutions must be found. It is postulated that PPBS should be developed jointly by the federal, state, and local education agencies rather than a function to be undertaken by any single agency. This is a postulate specifically insisting that educational organization operate as a system whether the emphasis given has a legal or a functional orientation.

Operational problems also grow from questions which consider the similarities and differences among local school district programs. If it is determined that their programs are so dissimilar that individual PPB systems are indicated, a narrowly defined and specifically described program will be both inappropriate and ineffective. A program that is sufficiently broad to

apply to all local school districts will need to be developed for use. This is not to preclude the possibility of local districts having different subprograms, but rather to suggest that all subprograms and all finite breakdowns of programs must be capable of common classification at broader gauge.

Many operational problems relate to the management capabilities of local school districts. Prevalence of the long outmoded belief that any local school district can undertake and appropriately and effectively operate any type of function that it decides is potentially desirable tends to multiply the number of problems of this type which arise. A local school system can be determined to have the necessary management capability for developing PPBS when it can:

* Budget over a multiyear period.
* Account and report expenditures by programs expressed in the budget. In most cases, such a cost accounting system requires computer hardware.
* Coordinate and plan the programs of the school system on both a horizontal and vertical basis.
* Provide relevant information for decision making—integrated information about pupil personnel, curriculum, facilities, and so on.
* Evaluate the programs. Such evaluation must have validity and reliability which, in most cases, will require objective evaluation techniques.
* Analyze current inputs and outputs and modify them when specific changes are deemed necessary.

Proposing that this list of management capabilities represents what is necessary for the implementation of PPBS is also to suggest that at the present time there are but few local school districts that could undertake such a program and expect that it would operate successfully. Most would need to employ additional personnel with specialized competence in systems analysis, educational measurement, and cost accounting. A shortage of trained personnel in these fields and the difficulties school systems are likely to have either in recruiting or in providing the training needed are additional limitations.

SOME CONCLUDING THOUGHTS AND QUESTIONS

A Planning-Programming-Budgeting System is an assembling of information and an adoption of procedures through which the objectives of a cluster of activities and the alternatives for achieving them over a multiyear period are determined, analyzed, evaluated, costed, and selected. It would seem, then, that a Planning-Programming-Budgeting-Analysis-Evaluation System would be more precisely descriptive of all that is involved. PPBS is keyed upon planning and includes objectives, alternatives, inputs, costs, time dimensions, outputs, analysis, and evaluation.

How active state education agencies can afford to be in promoting PPBS or how soon they might undertake statewide implementation are not easily determined. Can a state agency justify devoting the personnel, time, and resources that an immediate study of the problems and implications of PPBS in local school districts would require? Should they propose state legislation that would require local school districts to initiate PPBS? Should school districts be given the option of the conventional budgeting and accounting system or a PPB system? If so, would two reporting systems be necessary? Is a dual budgeting, accounting, and reporting system likely to be more troublesome than valuable?

It is apparent that there are substantial forces encouraging the development of PPBS in all the federal government agencies. Some of the larger local school districts are also anxious to initiate PPBS. The state level seems caught in the middle without being able either to promote the development of PPBS or to ignore it. How far and how rapidly its development, implementation, and improvement will go will be limited only by desire, ability, and the resources allocated to this purpose.

POPULATION CHARACTERISTICS AND SCHOOL DISTRICT PLANNING

Ellis G. Hanson

FOR NEARLY TWO YEARS Iowa, Missouri, Nebraska, and South Dakota have been engaged in a cooperative interstate project designed to strengthen state department of education leadership in the area of school district organization. Identified as the Great Plains School District Organization Project, this multistate effort has been supported by funds from the U. S. Office of Education under Title V of the Elementary and Secondary Education Act of 1965. It has been a comprehensive investigation and strategy planning operation with an emphasis on educational programs and school district structure and how both might be improved.

The importance of such a project is evident by the excessive number of school districts in these states. At the time the Project began, there were in these four states alone a total of 5,792 school districts or approximately one-fourth of all the school districts in the country. The official U. S. Office of Education figures for the fall of 1966 showed the following number of districts:

Total U. S.	23,461
Iowa	501
Missouri	888
Nebraska	2,388
South Dakota	2,015

Since its initiation, the Project has proceeded through three distinct phases. The first was an analysis of the strengths, weak-

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nesses, and limitations of the existing school organization in each of the four states. Phase two identified each state's educational needs. The third and final phase has been the determination and recommendation of structural patterns which would permit each of the four states to provide the programs and services indicated. A major hope for the Project has been its potential for the identification of criteria, guidelines, and techniques which could have applicability for school district reorganization efforts throughout the Midwest and other parts of the country. This article suggests how a study of population trends and characteristics has importance in the planning of school districts and school district reorganization.

THE AVAILABILITY OF POPULATION DATA

Any effort directed to planning the kind of educational program that should be offered and how schools should be organized must take into account the population of the state, community, or area—where and how people live, work, and play and where and how they can be expected to live, work, and play in the future. While the people of nearly every geographic area generally know for their locale that the population is increasing, that it is stable and holding its own, or that out-migration is resulting in a population decline, more precise information is needed when it comes to projecting specific and detailed educational plans. Generalizations and impressions, however accurate, are not adequate documentation.

Fortunately, a great deal of relatively current population data is already available for most areas. It is included in the published reports and analyses of the U. S. Bureau of the Census, in many of the studies reported by the extension divisions of the states' land-grant universities, and in the dissertations and theses of individuals in university departments of education, sociology, and business. Utility companies, chambers of commerce, and various branches of state and county government have population information that is useful. While the data available are generally reported for such political jurisdictions as the state or county, which in many instances have little or no relationship to school districts, the inferences and trends which can be drawn are generally applicable. Simple measures of approximation can also be applied to give reasonably accurate localized population data.

As a part of its efforts, the Great Plains School District Organization Project undertook a rather comprehensive population study of the four-state region. The data used in the various types of analyses were already available in a variety of publications and reports. A brief summary highlighting the report of that study follows. It suggests the kind of information that can be brought together and some of the ways it can be related to planning educational organization and programs.[1]

POPULATION CHARACTERISTICS OF THE REGION

Like nearly every other section of the country, the population distribution of the four states in the Great Plains Project is substantially different today from what it was just a few decades ago. The difference that stands out above all others is the massive shift of people from the rural farm areas to or toward the larger urban centers. There is hardly any question that the single most important contributor to this change is the application of technology and automation in agricultural production.

A general pattern of substantial rural out-migration and increasing urbanization began in earnest in the Great Plains during the early 1900's and it has continued unabated. The extensiveness of the rural exodus is far greater than is generally recognized. All but six of Iowa's 99 counties experienced an out-migration during the 1950-60 decade, for example. The six counties reporting an in-migration, on the other hand, all include an urban center of 50,000 or more population or are immediately adjacent to such counties.

During this same period, all but 18 of Missouri's 115 counties reflected an out-migration, and those 18 are within metropolitan complexes, are recreation areas now being developed, are major governmental centers, or include the location of a major college or university. Only five of Nebraska's 92 counties reported a population in-migration. Four of these are located in the Omaha-Lincoln complex; the remaining area, Kimball County in the western part of Nebraska, had a substantial in-migration during the 1950 to 1960 period because of oil developments in the area. Since 1960 there has been a reduction in the rate of

1. The full report of the population study and analysis is available in printed form. See Hanson, Ellis G. *People Places Perspectives: The Great Plains States*. Lincoln, Nebraska: The Great Plains School District Organization Project, 1968. 46 pp.

in-migration in that county, although it continued higher than most other areas of the state. Only four areas of South Dakota reflected growth, the Minnehaha County area showing an in-migration because of developments in Sioux Falls.

From predominately rural populations, three of the four states, South Dakota being the exception, have shifted in population distribution to a point where a majority is now in an urban classification. This migratory movement has accelerated the social and economic decline of many small towns and cities and the changing of organizational patterns within our society. It has contributed to the decline of associations and institutions and has been reflected in the area's economic activity, educational systems, and governmental efforts, and on the basic values and purposes of social existence.

This out-migration has been accompanied and aided by the rapid expansion, development, and improvement of transportation. The result is that the small rural village is no longer required to provide goods and services. These villages are being replaced in importance by increasing concentrations of population along the interstate highways which span all four states. At the present time, this linear or strip-city configuration is discernible in the following areas:

a. Sioux Falls, South Dakota, through Sioux City, Omaha, St. Joseph, and Kansas City to Joplin, Missouri.
b. Dubuque, Iowa, through Davenport and the other quad-cities and through St. Louis to Cape Girardeaux, Missouri.
c. Omaha through Grand Island to Lincoln, Nebraska.
d. Davenport through Des Moines to Council Bluffs and Omaha, connecting with the Omaha to Lincoln strip.
e. St. Louis through Columbia and Jefferson City to Kansas City, and continuing into eastern Kansas through Lawrence to Topeka.

In addition to the increasing urban concentration of the population, three of the four states of the Great Plains Project area show a substantial in-migration of nonwhites, mostly Negroes who have moved into the urban centers of Omaha, Council Bluffs, Lincoln, Kansas City, St. Louis, and Des Moines. While the percentage increases of Negro and other nonwhite groups appear large, the number of such persons is extremely small. Less than one percent of the 1960 population of both Iowa and South

Dakota was Negro, for example, despite the fact that these states had experienced approximately 35 and 55 percent increases in the twenty-year period since 1940. Despite this relatively small numerical increase of Negro residents, South Dakota actually had an out-migration of its nonwhite population. This is the result of the substantial number of American Indians who have been moving from the state since the early 1940's.

The age distribution of the population of a given area is also important for educational planning. Several distinct trends were discernible in the four-state area in 1960 and all have magnified since then. The percentages of the region's total population under age 15 and over 65 have both increased markedly. At the same time, the percentage in the 25 to 45 age range has declined. Contributing to this changing composition are variations in the actual number of potential parents in the total population—the result of the depression and other factors, increasing life expectancy, and physical out-migration from the area. Even though the region has a larger percentage of its population 65 and over than does the nation as a whole, increases in the younger age groups and out-migration of the middle age groups has caused the median age for the region to drop from 30.2 years in 1950 to an estimated 27.2 years in 1965.

PROJECTING PRESENT TRENDS

If the trends of the past several decades continue, the population of the Great Plains area will become an even smaller proportion of the nation's total. Even though the overall population of the area has continuously increased, the rate of increase has been substantially below the national rate of increase. Proportionally the area has become smaller each year. The implications this trend has for legislative reapportionment within states and for the nation as a whole are immediately obvious. The pressures for proportional representation can be expected to be greater than ever before.

With the increased application of technology and implementation of automation anticipated in agriculture, the rural population is expected to decrease further. It is expected that by 1980 the population of Missouri, Iowa, and Nebraska will approach 70 percent urban and 30 percent rural. The rate of urbanization in South Dakota has not yet reached that of the other states.

Because it presently has fewer urban centers and a smaller potential for growth, its population composition by 1980 is more likely to be about 45 and 55 percent urban and rural, respectively. The pace of its urbanization is slower but the direction of development is the same. Thus the more densely populated areas can be expected to expand in population and become more densely populated and the sparsely populated areas will become more sparsely populated.

Unless substantial economic inputs are initiated within the area creating jobs at the skilled and semiskilled levels, the outmigration of the vital 18-45 year age group is expected to continue at a rate comparable to that of the past 15 years. This is expected to produce an additional drain from the area of potential parents and the group possessing the highest income producing potential. Percentagewise, the largest increase in area population is expected in the age group 65 years and over.

Internal mobility within the urban areas and continued racial in-migrations can be expected to continue. The extensive movements of population from central cities to suburban areas and along the interstate highways will mark the next two or three decades. The movement of Negroes and other nonwhite groups from the central cities to suburbs began in the late 1950's. To date, it has been slow but it is a movement that can be expected to accelerate.

In Iowa, Missouri, and the eastern one-third of both Nebraska and South Dakota, most cities and towns of 2,500 or less will encounter increasing difficulty in maintaining a stable population. Communities that are even smaller—unless they are either extremely isolated or within ready commuting range of major urban centers—will have extreme difficulty continuing as viable and cohesive community centers. They will wither away in significance while many social, economic, and government programs are developed on an enlarged "economic area" concept. Population changes have virtually shattered the stability of many communities. To study the details of population change is to raise question after question with respect to the adequacy of existing social institutions and their ability to cope with changing needs and demands.

IMPLICATIONS FOR SCHOOLS

The number and size of the existing school districts in the

four states of the Great Plains School District Organization Project suggest strongly the need for continuing efforts to develop larger and stronger local school units. There can be little doubt that major school district reorganization remains to be accomplished. Emphasized by a study of the changing composition of the area's population are trends which could be helpful in planning for organizational change. From some of the developments earlier indicated, certain guides to school district reorganization deserve particular attention.

1. *The criteria of a single identifiable local community or a group of interrelated local communities as the base for an operating school district is increasingly obsolete.* That a proposed school district should consist of a cohesive and self-sufficient community or community cluster has been prevalent (and in some states commanding) since the early 1940's, when district reorganization efforts got underway in earnest. When one views the massive movement of people from the small communities and rural areas of the Midwest, it becomes clear that this concept is no longer tenable. While some of the small communities of Iowa, Missouri, Nebraska, and South Dakota will continue as minimum convenience centers and provide a very limited range of goods and services to a declining population, the school districts that are formed must be organized around enlarged social, political, and economic communities in order to be effective. Those responsible for reorganization must look beyond the residentiary activities and interests of the local community. The increased vistas of social, economic, governmental, and cultural environments must be identified and employed in the delineation of enlarged geographic areas for local school districts. While the principle that every identifiable community should maintain a school is important and valid, it is not essential and will become increasingly inappropriate for every such community to be a separate school district.
2. *Local school districts should have a sufficient population base to assure stability and continuity.* There is little indication that communities of less than 2,500 people can or will in the future remain dynamic community centers unless they are within a 25-30 mile radius of a major urban center or are located in an extremely isolated area.

A community center having a population base of at least 2,500, therefore, is regarded as the minimum for school district reorganization planning. While it will not always be possible to achieve this minimum, most areas can meet or exceed it. In the isolated areas of central and western Nebraska and South Dakota, where few city centers exceed 1,000 to 1,500 people, there will continue to be a problem of an adequate population base to permit the economical and efficient development of quantitative and qualitative educational programs. Larger geographic areas and greater operational involvement of an even larger regional educational agency are clearly indicated.

3. *Emerging demographic changes necessitate that future school district reorganization be based upon comprehensive statewide planning.* The traditional approach to reorganization planning in many states has been through county school district reorganization committees, county boards of education, or some other group or body operating at the county level. The approach has had a tendency to preclude the creation of logical districts which straddle county boundary lines. Planning so limited results in many districts that are too small and some that are wholly inappropriate. The changing composition and distribution of state populations and increasing mobility require a different approach. In order to assure high quality educational opportunities for all students in a state, comprehensive planning for school district reorganization should be delegated to a legislatively created planning commission or through a legislative mandate to the state education agency.

4. *An enlarged and strengthened middle echelon of school government should be developed in the four Midwest states.* The population distribution throughout the four states of the Project area indicate that most school districts will continue to be relatively small. In most areas of Iowa and Missouri and in the eastern portions of Nebraska and South Dakota, it should be possible to form administrative districts with minimum populations of 4,000 to 5,000 students. But such districts are extremely small and inadequate in relation to educational programs or services that require a high level of specialized personnel or equipment, or that apply to only a small percentage of a student popu-

lation. For such programs and services, a strong and stable multicounty educational service agency will be needed. The development of a statewide network of such educational units in each state could provide and assure a level and quality of specialized educational programs, and a degree of flexibility heretofore unknown in education.

5. *Increasing attention must be directed to the problems of urban education in the Midwest.* This region continues to regard itself and to be regarded as the heart of rural America. As indicated earlier, however, three of the four states involved in the Project area already have an urban population majority. The public school enrollments of urban centers are increasing as rural enrollments decline. In Iowa, the 25 largest school districts enroll 40 percent of the state's public school students. The schools in the Kansas City and St. Louis metropolitan complexes enroll 44.7 percent of all Missouri public school students. Omaha and Lincoln presently enroll approximately 50 percent of Nebraska's public school students, while in South Dakota, Sioux Falls and Rapid City have public school enrollments which account for approximately 20 percent of the state's total. As suburban developments continue to spread outward from the center city and as the strip cities along the interstate highways develop and fill in to new population configurations, these states will become even more urbanized. Regional approaches will need to be given greater emphasis. It is already clearly indicated that planning for education in the central cities cannot be isolated from the total urban complex. The interrelatedness of economic, social, cultural, and governmental spheres necessitates the serious consideration of a "metro approach" to educational planning.

Educational planning involves relating as much information as is obtainable to a projection of the objectives schools and school organization should seek to accomplish. Developments related to curriculum content, instructional technology, and learning theory have major implications for this planning process. So do the patterns and trends evident from an analysis of population data. These data have a special relationship for the formation and reorganization of school districts. They have not been ignored in the Great Plains Project.

THE MULTIDISTRICT LOCAL EDUCATION AGENCY

Robert M. Isenberg

THOSE WHO REMEMBER the details of how the Elementary and Secondary Education Act came into being can attest to the fact that its content had been developed by a small group of selected consultants working in relative isolation, and that the proposal was presented in full detail before most educators or anyone else was much aware that it was being considered. Its comprehensiveness and versatility, the soundness of its educational philosophy, and the amount of money it called for caught the educational community a little off guard. To some extent the surprise was justified, however. More than a billion additional federal dollars for education in a single year was a most startling suggestion!

Almost equally surprising was the way the proposal survived consideration by Congressional committees without any major amendments or changes. The bill ultimately enacted and signed by President Johnson on April 11, 1965 as P.L. 89-10 was virtually identical in its content to what he had presented to the Congress only a few months earlier in his education message. A major proposal that had arrived on the scene "full-blown" became law with only minor modifications.

Much might be said about the content of this legislation, how it was developed, the objectives underlying its provisions, or the unusual circumstances permitting it to work through the legis-

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lative process without mutilation or compromise. This discussion is much more limited. Its purpose is to identify just one of the small changes made in the language of the proposal and to illustrate how this modification has made a difference during the now more than two years that the law has been operative.

NEW DEFINITION FOR LOCAL EDUCATION AGENCY

Introduced early in the First Session of the 89th Congress were H.R. 2362 and S. 370, identical versions of a bill which would "strengthen and improve educational quality and educational opportunities in the nation's elementary and secondary schools." It carried the title, "Elementary and Secondary Education Act of 1965." As was soon well known, the proposal included five operational parts: assisting school systems having large concentrations of children from low-income families, providing school library resources and instructional materials, supporting supplementary educational centers and services, broadening the scope of educational research, and strengthening state departments of education.

Less well known is the fact that the legislation proposal contained a "Title VI-General Provisions" consisting of definitions of terms, provisions for the establishment of advisory councils, and prohibitions against both federal control of education and the use of federal funds for religious purposes. It is easy to discount the importance of such a section, a seemingly simple and routine collection of items included in the bill only to clarify and support its operational titles. To do so is to be misled. The innocent words of such a section may well shape the way all other provisions of the proposal will be implemented and administered.

A minor change was introduced by the Subcommittee on Education of the Senate Committee on Labor and Public Welfare following hearings with regard to the definition of a *local educational agency*. The change was minor only in the sense that it required but few words. It was major in the way it modified the meaning of the law. The specific change made can best be identified by quoting directly from the official documents. As introduced into the Senate in mid-January 1965 as S. 370 (and identically in the House of Representatives as H.R. 2362), Title VI, Section 601 (f), was as follows:

> The term "local educational agency" means a board of education or other legally constituted local school authority having administrative control and direction of public elementary or secondary schools in a city, county, township, school district, or political subdivision in a State, or any other public institution or agency having administrative control and direction of a public elementary or secondary school."

The key words in this definition were *having administrative control and direction*. What had been built into the proposal was language similar to that which had been included earlier in the National Defense Education Act. It served well to equate the "local educational agency" definition with what is commonly known as a local school district. What it failed to do was to include the multidistrict local agency which had been developing in a number of states to assist and strengthen local school district programs through the provision of certain specialized educational services. The Boards of Cooperative Educational Services in New York, Cooperative Educational Service Units in Nebraska, and Intermediate Education Districts in Oregon are illustrative of this type of regional service agency. None was *directly* responsible for operating an elementary or secondary school. Some were providing vocational education programs, guidance and psychological services, curriculum development, programs for various types of exceptional children, in-service education, and numerous other programs more effectively provided on a multidistrict basis. But except for schools in hospitals, detention homes, or other special institutions, the regional agencies did not actually have, nor did they assume, direct responsibility for school operation.

Lack of operational responsibilities actually has been one of the greatest assets of the regional agency. It is free to develop the specialized service programs which it is uniquely equipped to furnish. The handicap that became apparent in the administration of the NDEA and its definition of local education agencies eligible to receive funds as those "having administrative control and direction" was a result of different interpretations in different states. How the definition was interpreted and whether or not regional service agencies were considered eligible for funds was dependent on state education agency interpreta-

tion. They were not eligible where the prevailing attitude at state level was "strict construction." They were eligible, on the other hand, where state interpretation was more liberal. The Intermediate School Districts of Michigan, for example, were eligible; the similarly organized and operating Intermediate Education Districts of Oregon were not.

It was to eliminate any confusion or misunderstanding about eligibility or about what was or was not a local education agency that the Senate Subcommittee elected to modify the original proposal. After consideration of which way to go on this issue, the Subcommittee elected to make certain that in those states where regional agencies were organized and operating, *they would be eligible.* This was accomplished in a very simple way—by amending the definition of what would be considered a "local educational agency." Their modification was later accepted by the House of Representatives and SECTION 601 (f) Title VI of P.L. 89-10 follows:

> The term "local educational 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 term also includes any other public institution or agency having administrative control and direction of a public elementary or secondary school."

It will be noted that two concepts were introduced into the definition by this modification. One was the unmistakable inclusion of agencies which *perform as a service function* along with those "having administrative control and direction." The other was an equally clear inclusion of regional agencies through *such combination of school districts or counties as are recognized.*

Especially significant in this change of definition was the insistence that all local educational agencies, other than local school districts made eligible to receive federal funds under the

provisions of the Elementary and Secondary Education Act, would be required to meet the test of being *recognized in a State as an administrative agency for its public elementary and secondary schools.* This requirement assured the integrity of each state system of schools, and made eligible agencies which were legally a part of that system. But it excluded all service agencies already existing and those which might later be created if they were not "recognized" by the state as "an administrative agency" in its system of schools.

In terms of significance (and perhaps for future strategy), the manner by which the legislation was changed should not be overlooked. The term "local educational agency" was mentioned throughout the text of the proposed bill. To modify its meaning each time would have been chaotic. It has been reported earlier that this particular education bill moved through the legislative process with almost no alterations. Because the complete political force of the administration was working diligently to stave off all attempts to dilute or redirect this proposal, it is almost certain that the overhaul of meaning suggested would have been doomed to failure. Fortunately, it was not necessary. The same result was accomplished by the modest change of a few words in the definition contained in Title VI. This was sufficient to broaden the meaning of "local educational agency" wherever the term appeared in the operational titles.

LIMITATIONS OF THE NEW DEFINITION

It should be pointed out that the broadened definition of a local educational agency was not applicable to all five of the operational titles of P.L. 89-10. It was, in fact, considerably limited. SECTION 601 of Title VI begins with the words "As used in Titles II, III, and V of this Act . . ." and then follows with the specific definitions. It is therefore obvious that the broadened definition was to be limited to those three sections and would not be applicable to Titles I and IV.

The chief reason for this limitation can be found in the way P.L. 89-10 had been constructed. While Title I presented a new concept in federal financial assistance, with its more than one billion dollars appropriated annually, it was actually included in the new law as an amendment to the impacted area legislation, P.L. 81-874. Title I was made a part of that law, originally enacted in 1950, and broadened to include "the impact that con

centrations of low-income families have on the ability of local educational agencies to support adequate educational programs." In somewhat the same way, Title IV was included in P.L. 89-10 as an amendment to the Cooperative Research Act, P.L. 83-531, passed initially in 1954.

Not only was the broadened definition not applicable to Title I because of the construction of the legislation, it was further removed by the regulations developed to govern its implementation. The authors of the regulations seemed as anxious as the Senate Subcommittee in making sure their meaning could not be misinterpreted. In Section 116.1 (p) of the regulations, the definition of what was to be considered a "local educational agency" for this title includes the phrase ". . . but does not mean a public authority which merely provides a service function for public elementary and secondary schools." [1] The fact that these regulations were later modified to include the identical definition applicable to Titles II, III, and V is subsequently documented.

APPLICATIONS UNDER TITLE III

This redefined meaning of a local education agency added two basic concepts to broaden the types of agencies eligible to receive federal funds: it included agencies composed of a multidistrict or regional area, and agencies providing supportive and supplementary services for elementary and secondary school programs including those that do not have direct responsibility for all aspects of these programs. It was required that the service agencies included be an integral part of the state's legal system for education.

While the language of Section 601 made this definition applicable to all aspects of Titles II, III, and V, its applicability through local initiative was, in reality, limited to Title III. The direction of Title II programs for distributing library books and other instructional materials was dependent upon the provisions of the state plan developed in each state. Many states enlisted a high degree of local education agency involvement in the development of their state plan, but the initiative remained necessarily at the state level. In the same way with Title V, the initiative could be undertaken only by the state agency itself in strengthening the services of state education departments, and

1. Government Printing Office. *The Federal Register*, Part II. Regulations P.L. 89-10, Titles I and II. Vol. 30, September 15, 1965. p. 11810.

in developing a higher level of statewide leadership. And so it was that only for Title III could the additional local education agencies included by the new definition exercise initiative.

The guidelines developed by the U. S. Office of Education, offered the most effective channel for communicating with local education agencies eligible to develop and submit projects under Title III. In addition to the specification of the mechanics for submitting proposals (number of copies required, submission dates, form, etc.), the areas of high and low priority as emphasized by the Advisory Committee, and the broad involvement of cultural, social, and other community resources in planning, developing, and carrying out projects, the original guidelines clearly identified which agencies could apply. "Project proposals may be submitted only by a *local or intermediate educational agency or agencies.*" [2] The guidelines clearly were broader than the law itself. The description of eligible applicants included the following: "The applicant may also be a combination of intermediate school districts or counties, which are recognized in a State as an administrative agency for its public elementary and secondary schools, and may include interstate groupings of eligible applicants." [3]

Many approaches were helpful in informing local and state education agencies regarding the potential of Title III, how project proposals should be developed, and how they would be considered. State departments of education organized and conducted workshops and clinics on Title III. Staff members from the U. S. Office of Education participated in a wide variety of programs designed to inform and assist. One special effort was specifically geared to smaller school systems and to the multidistrict and service agency approach. It emphasized chiefly that a high quality supplementary program of services required specialized personnel and a pupil population base considerably larger than a single small school district, and illustrated this by the development of several "model" projects.[4]

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2. U. S. Department of Health, Education, and Welfare, Office of Education. *PACE—Projects to Advance Creativity in Education.* "ESEA Title III Guidelines. Grants For Planning and Establishing Supplementary Educational Centers and Services." Washington, D. C.: Government Printing Office, 1965. p. 14.
3. *Ibid.*
4. National Education Association, Department of Rural Education. *A Guide for Developing Projects to Advance Creativity in Education.* Washington, D. C.: the Department, 1966. 94 p.

Whatever the method of becoming informed, it was soon obvious from the initial proposals submitted that applicants were aware that service agencies could apply directly to the USOE and that multidistrict proposals were acceptable. The U. S. Commissioner of Education, with the advice of the eight-member Advisory Committee, and the review and recommendations of USOE staff, outside reviewers, and state education agencies, approved for funding 217 proposals or approximately 30 percent of the nearly 750 project proposals submitted. Of the 217 approved, 105 or nearly half, were multidistrict projects; the applicant for 46 of the projects approved, or slightly more than one in five, was a regional agency providing service functions only. Examples of a few specific projects illustrate the breadth of diversity local education agencies considered as areas of high priority needs and how they utilized or created regional cooperative organizations to do something about them.[5]

As indicated, an existing intermediate or other regional service agency was the actual applicant agency in a number of instances. A project aimed at the better utilization of instructional materials and library resources in the 16 central school districts of the area served by the Board of Cooperative Educational Services of Chautauqua County, New York, is illustrative. Others included: the service program for certain types of exceptional children in Osage County, Oklahoma; an assessment and planning effort in Montgomery County, Ohio; a summer residential school for able high school students in the Jackson County Intermediate Education District in Oregon, and a regional outdoor education program for children and teachers in the schools of the Multnomah County Intermediate Education District of the same state; the learning-resources center in Adams County, Pennsylvania; and the planning for innovation effort by the 18 school districts of Pierce County, Washington. In some instances, a regional service agency was the applicant for a project to serve the school districts in a combination of regional agencies. Santa Barbara County, California, for example, was the applicant and administering agency for an innovative planning agency involving the area of San Luis Obispo and Ventura Counties. In

5. U. S. Department of Health, Education, and Welfare, Office of Education. *Pacesetters in Innovation.* OE-23046. Washington, D. C.: Government Printing Office, 1966. 113 p. (Brief abstracts and additional documentation for all 217 of the projects approved in the first review and consideration are included.)

the Northern part of the same state, Humboldt County received a grant in support of a similar planning and development project for a four-county area. A similar center to coordinate regional planning efforts was approved for Montour County, Pennsylvania, for an idea which included Columbia, Northumberland, Snyder, and Union Counties.

The timing of the Elementary and Secondary Education Act, particularly Title III, had special significance for the regional education service agencies in several states. For example, early in 1965, the unicameral legislature of Nebraska had enacted provisions for a statewide network of regional service agencies. One of the first Title III projects approved was submitted by the City of Alliance, Nebraska, to support a program planning effort in the multicounty area of Cooperative Educational Service Unit No. 17. A somewhat parallel circumstance existed in Wisconsin. That state had established earlier a network of 19 multidistrict cooperative agencies which, at the time the ESEA came on the scene, were struggling to develop service programs with a paucity of funds. Some in Wisconsin saw a close relationship between the Supplementary Educational Centers and Services and their relatively new Cooperative Educational Service Agencies. Only two Wisconsin proposals were approved in the first project review and both were from these new regional service agencies.

The most popular type of multidistrict proposal among the initial projects approved was that in which a single local education agency submitted the proposal and became the project administrator for a previously agreed upon consortium of local school districts. The following are illustrative: Magnolia School District No. 14 in Arkansas applied for and coordinated a project through which a diagnostic and remedial services center was established to serve all children in a five-county area having various learning difficulties. District No. 1 of Flagstaff, Arizona was the applicant for a project to study how a wide variety of specialized educational services might best be provided in the five northern counties of that state. The Seattle City Schools received a grant to plan an arts and sciences program at the Seattle Civic Center for all the schools and school systems in Washington's Puget Sound metropolitan area. The Worth School District No. 127 in Illinois was applicant for a curriculum development program serving seven separate elementary school districts, two Lutheran districts, and the Catholic Archdiocesan

Schools of Chicago. The Madison, Kansas Unified School District received a grant to develop a cultural enrichment program in a seven-county area. Coeur d'Alene, Idaho was funded to develop a broad-reaching outdoor education program for the 30 school districts and 18 private schools of the ten-county area of Northern Idaho. And Grand Forks, North Dakota applied for a curriculum planning grant for an eleven-county region in the Northeastern part of that state.

These multidistrict projects were submitted by local education agencies from states having a large number of small school districts or having some type of regional or intermediate district service agency to initiate or to administer a proposal. But multidistrict proposals were submitted equally as readily from "county unit" states where patterns of interdistrict cooperation were less well established. In Florida, for example, a three-county materials sharing proposal was granted to Volusia County as well as a four-county planning project for curriculum enrichment to Sarasota County. In Georgia, Marion County and Coffee County had projects approved to include all the school systems in the Third and Eighth Congressional Districts, respectively, of that state. The Rocky Mount City Schools in North Carolina received a curriculum planning grant which tied it to the nearby Tarboro City Schools and the school systems of both Nash and Edgecombe Counties. Eight West Virginia counties—Grant, Morgan, Pendleton, Hardy, Hampshire, Jefferson, Mineral, and Berkeley—joined together in a program designed primarily for curriculum development and the in-service development of the instructional staff. Another West Virginia project involved seven separate county school systems—Jackson, Pleasants, Ritchie, Roane, Tyler, Wirt, and Wood—in a curriculum center staffed with subject matter and research consultants.

The imagination of local education agencies was by no means limited to a compact multidistrict area. A major project approved for California tied ten widely separated counties together in a project combining a computerized information processing system with a training program in the use of electronic computers in educational data processing. The Davis County School District in Utah was the applicant agency for a project to operate a multidistrict instructional television network as well as produce, distribute, and coordinate ETV programs on a statewide basis. In New Hampshire, Supervisory Union No. 56 in Somersworth received a grant to plan a program of children's theatre tours

for all the elementary schools in the state.

Nor were the projects submitted and approved limited to a single state. School District No. 30 in Salem, Arkansas was the recipient of a planning grant to determine how greater emphasis might be given the fine and performing arts in the programs provided for high school students in north-central Arkansas and southern Missouri. An operational grant designed to provide a wide range of curriculum enrichment including the fine and performing arts with other programs was awarded the Broome County Board of Cooperative Educational Services for an eleven-county area of southern New York and northern Pennsylvania. Perhaps the most elaborate of all the interstate projects was the cooperative development and simultaneous submission of three interrelated projects to operate a single center and many faceted program in the social sciences and humanities. The proposal was funded as three separate projects. It included all of the public and nonprofit private schools of New York City; in the counties of Nassau, Rockland, Suffolk, and Westchester in New York; in the City of Newark and the counties of Bergen, Hudson, and Union in New Jersey; and in Fairfield County, Connecticut.

The specific projects identified in the foregoing paragraphs were all approved in the first Title III submission period. Nearly all have been modified since 1966, have been replaced by operational grants, or have been dropped by the wayside in preference for other activities judged to have higher priority. Individually, few of these projects continue to have much importance. They have been cited because they illustrate the multidistrict projects which made up nearly half the projects funded in the first Title III submission period. Congress had written a new definition for "local educational agency." Multidistrict programs and projects submitted by service agencies came within its scope. The readiness of local education agencies to respond was demonstrated.

In the subsequent submission periods of Fiscal Years 1966, 1967, and 1968, there was a marked increase in the quality of the proposals submitted. Title III seemed to capture the imagination of school people and many creative and sophisticated ideas were translated into project proposals. Much happened.

From the time Title III became law through the second and final submission period of the 1968 Fiscal Year, a total of 2,317 proposals and another 223 minigrant proposals had been approved and funded. These projects involved approximately $230,000,000 in federal support. Nearly 65 percent of these

projects involved a combination of separate school systems, and for about 30 percent, a regional service agency was the applicant. The readiness of local education agencies to implement "projects to advance creativity in education" had been demonstrated.

OTHER APPLICATIONS OF THE MULTIDISTRICT APPROACH

While not many states elected to utilize the multidistrict agency in their State Plan for acquiring and distributing library resources, textbooks, and other instructional materials under the provisions of Title II of the ESEA, the potential of the approach was recognized in both Iowa and Michigan. The Iowa Plan designated sixteen strategically located county boards of education as the sole agencies for purchasing, processing, and distributing all of the materials that would be made available in the state under Title II. These agencies were permitted under the State Plan to establish distribution centers and to use a portion of the funds for films and other nonprint materials. The result of the approach has been not only a statewide program of rotating library collections but the development of regional film libraries as well. Creating these 16 regional instructional materials centers to serve local school districts in the state's 99 counties suggests the size of the area each center serves. The State Plan in Michigan made the Intermediate School Districts responsible for certain of the initial Title II purchasing and processing functions but did not utilize the approach nearly as completely as did Iowa.

Numerous additional applications of the multidistrict concept have been developed—some in relation to various aspects of the ESEA and some completely independently. The network of Supplementary Education Centers established in California as extensions of the State Department of Education to coordinate and assist in the planning and development of Title III projects is an example. In Texas, coordinating projects developed for Title III, operating as regional media centers, and serving as a base for regional and statewide planning were specific functions assigned to the 20 Education Service Centers established to serve Texas' 254 counties.[6] Less formal in organization but somewhat

6. See: "The Regional Education Service Centers in Texas." *Journal on State School Systems Development* 1:163-72; Fall 1967.

similar in the functions performed have been the several Educational Research and Development Councils established as the creatures of local school district cooperative action to include much of the territory of Minnesota.

The multidistrict approach to program development was further extended in the Elementary and Secondary Education Act Amendments of 1967. In the new Title VI, Education of Handicapped Children, Section 604 contains the following statement: "Nothing in this part shall be deemed to preclude two or more local educational agencies from entering into agreements, at their option, for carrying out jointly operated programs and projects under this part." Similarly, the concept has been further reinforced by those directing the implementation of the Education Professions Development Act of 1967. The Guidelines for preparing proposals under the provisions of that act specifically encourage "consortia" of institutions and agencies.[7]

One of the most significant extensions toward the multidistrict approach to program development came as a reversal of the prohibitions under Title I of the ESEA for meeting the special educational needs of educationally deprived children. The earlier guidelines not only had defined a local education agency in pre-ESEA terms but also specified exclusion of agencies performing only service functions. The revised guidelines in 1967 included the new definition of a local education agency as applied to Titles II, III, and V applicable in the same way to Title I.[8]

The multidistrict area has unquestionably been utilized as a local education agency for complex and specialized educational functions. Its merit seems to be in its adaptability. It furnishes a large enough population base to permit the operation of effective programs. At the same time, its cooperative nature does not upset the existing school district structure. With such great advantages, even greater use of the multidistrict local education agency can be expected in the future.

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7. U. S. Department of Health, Education, and Welfare, Office of Education. *Guidelines: The Preparation of Proposals for Educational Personal Development Grants—1968, 1969, 1970.* 0-298-632. Washington, D. C.: Government Printing Office, April 29, 1968. p. 17.

8. Government Printing Office. *The Federal Register.* Vol. 32, February 9, 1967. p. 2743. (definitions for "local education educational agency" and "service function" as they relate to Title I, sections [r] and [y]).

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on

Educational Organization and Reorganization

The published materials included in this bibliography have been selected in terms of quality, recency, and general accessibility. Except for a few comprehensive works which have not been replaced by more recent materials, all items selected have been published within the past ten years.

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