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ABSTRACT

A system of individually guided education in the multiunit elementary school organizes the school into instruction and research units headed by a unit leader. This study determined the extent of agreement among and between principals, teachers, and unit leaders regarding expectations held for the unit leader role; examined the relationship between referent group agreement and performance effectiveness ratings; and investigated the relationship between selected organizational variables and agreement on role expectations. Data were collected from a sample of 48 principals, 48 unit leaders, and 96 teachers in Wisconsin districts. (Author/MLF)

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Technical Report No. 318

PERCEIVED ROLE AND EFFECTIVENESS OF THE UNIT LEADER IN CONDUCTING UNIT FUNCTIONS

Report from the Project on Organization for Instruction and Administrative Arrangements

by Terrance John Sheridan

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Principal Investigator

EA 006 720

Wisconsin Research and Development
Center for Cognitive Learning
The University of Wisconsin
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STATEMENT OF FOCUS

Individually Guided Education (IGE) is a new comprehensive system of elementary education. The following components of the IGE system are in varying stages of development and implementation: a new organization for instruction and related administrative arrangements; a model of instructional programing for the individual student; and curriculum components in prereading, reading, mathematics, motivation, and environmental education. The development of other curriculum components, of a system for managing instruction by computer, and of instructional strategies is needed to complete the system. Continuing programmatic research is required to provide a sound knowledge base for the components under development and for improved second generation components. Finally, systematic implementation is essential so that the products will function properly in the IGE schools.

The Center plans and carries out the research, development, and implementation components of its IGE program in this sequence: (1) identify the needs and delimit the component problem area; (2) assess the possible constraints--financial resources and availability of staff; (3) formulate general plans and specific procedures for solving the problems; (4) secure and allocate human and material resources to carry out the plans; (5) provide for effective communication among personnel and efficient management of activities and resources; and (6) evaluate the effectiveness of each activity and its contribution to the total program and correct any difficulties through feedback mechanisms and appropriate management techniques.

A self-renewing system of elementary education is projected in each participating elementary school, i.e., one which is less dependent on external sources for direction and is more responsive to the needs of the children attending each particular school. In the IGE schools, Center-developed and other curriculum products compatible with the Center's instructional programing model will lead to higher morale and job satisfaction among educational personnel. Each developmental product makes its unique contribution to IGE as it is implemented in the schools. The various research components add to the knowledge of Center practitioners, developers, and theorists.

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The completion of this study would not have been realized if it were not for the assistance, understanding, and cooperation freely offered by many people.

I wish to express my most sincere appreciation for the support, encouragement, and friendship extended to me as an individual by my major professor, James M. Lipham. Without his insight and constructive criticism together with his continued prodding, this objective would not have been realized. Special thanks are extended to Professors Donald N. McIsaac and Richard A. Rossmiller for the time and assistance they have provided as members of the writing committee. Appreciation is also extended to Professors Marvin J. Fruth and Dale D. Johnson who served as members of the examining committee.

Finally, immeasurable appreciation is extended to my wife, Flo, for her moral support, patience, advice, and constant assistance in every phase of the study.

Kevin and Kathy, Daddy can play football or even go to the zoo now.

T.J.S.

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TABLE OF CONTENTS

Page

ACKNOWLEDGEMENTS iv

LIST OF TABLES vii

LIST OF FIGURES ix

ABSTRACT xi

CHAPTER

I. ORIENTATION TO THE STUDY 1

General Background of the Study
Statement of the Problem
Review of Related Literature
Antecedents of IGE-MUS-E
Individually Guided Education
MUS-E Component
Related Research
Theoretical Framework
Social Systems
Role
Effectiveness
Related Research
Significance of the Study
Limitations of the Study
Summary

II. DESIGN AND METHODOLOGY 43

Statement of the Problem
Hypotheses
Ancillary Questions
Definition of Terms
Development of the Survey Instrument
Development of Items
Instrument Validity
The Nature of the Pilot Study
Factor Analysis
Reliability
Instrument Description
Study Population and Sample
Data Collection Procedures
Data Treatment
Summary

BEST COPY AVAILABLE

CHAPTER Page

III. ANALYSIS OF THE DATA 77

Demographic Profile of Respondents
Validity and Reliability of the Instrument
Validity
Reliability
Tests of Hypotheses
Ancillary Questions
Summary

IV. SUMMARY, FINDINGS, CONCLUSIONS AND IMPLICATIONS 119

Summary
Findings and Conclusions
Implications for Practice and Further Research

BIBLIOGRAPHY 135

APPENDICES

A. Unit Leader Panel Questionnaire 143

B. Unit Leader Role Analysis Questionnaire-Pilot 151

C. Unit Leader Role Analysis Questionnaire. . . 175

D. Correspondence Related to Data Collection. . 203

E. TSTAT Results - Effectiveness Scales 207

F. F Values of Among Group Differences in Expectations by Items 211

G. T-Tests of Differences in Means By Groups and Items 215

BEST COPY AVAILABLE

LIST OF TABLES

TABLE		PAGE
I.	Coefficient Alphas for Each Dimension and for all Items	59
II.	Instructional Coordination Tasks	62
III.	Organizational Relationships	64
IV.	Unit Renewal	65
V.	Management Activities	66
VI.	Distribution of School Districts According to Number of Professional Staff	78
VII.	Sex of Respondents, Categorized by Group, Frequency, Percentage and Total	79
VIII.	Professional Training Level of Respondents	80
IX.	Number of Years of Teaching/Administrative Experience	81
X.	Distribution of Units According to Number of Staff and Students	82
XI.	Inservice Training Exposure of Respondents to I.G.E. Concepts	83
XII.	Rotated Factor Matrix	86
XIII.	Reordered Oblique Projection Loadings Over Four Factors and Fifty-Six Items	87
XIV.	Intra-Organizational Relationships	89
XV.	Extra-Organizational Relationships	91
XVI.	Instructional Coordination	93
XVII.	Management Activities	94
XVIII.	Coefficient Alphas for Each Dimension and for all Items	97
XIX.	Analysis of the ULRA By Program TSTAT For Individual Items Over Four Scales	99
XX.	F Values Resulting from One Way Analyses of Varience of the Expectations Scores of the Principals, Unit Teachers and Unit Leaders by Scale	102
XXI.	T-Tests of Group Means for Intra-Organizational Relationship Scale	103
XXII.	T-Tests of Group Means for Instructional Coordination Scale	104
XXIII.	Correlation Coefficients for the Congruence of Expectations Held by the Principals and Unit Leaders and the Principal's Rating of Unit Leader's Effectiveness	106
XXIV.	Correlation Coefficients for the Congruence of Expectations Held by the Unit Teachers and Unit Leaders and the Unit Teacher's Rating of the Unit Leader's Effectiveness	107
XXV.	Correlation Coefficients for the Congruence of Expectations Held by Principals and Unit Teachers and their mean Ratings of the Unit Leader's Effectiveness	108
XXVI.	Correlation Coefficients for the Congruence of Expectations Held by the Principals and Unit Leaders and the Principal's Rating of the Unit Leader's Overall Effectiveness	109
XXVII.	Correlation Coefficients for the Congruence of Expectations Held by the Unit Teachers and Unit Leaders and Unit Teachers' Ratings of the Unit Leader's Overall Effectiveness	110
XXVIII.	Correlation Coefficients for the Congruence of Expectations Held by Principals and Unit Teachers and their Mean Ratings of the Unit Leader's Overall Effectiveness	110
XXIX.	Correlation Coefficients for Selected Organizational Variables and the Congruence of Expectations Held by Principals and Unit Leaders	114

TABLE | PAGE

XXX. Correlation Coefficients for Selected Organizational Variables and the Congruence of Expectations Held by Principals and Unit Teachers 115

XXXI. Correlation Coefficients for Selected Organizational Variables and the Congruence of Expectations Held by Unit Leaders and Unit Teachers 116

LIST OF FIGURES

FIGURE | PAGE

1 Organizational Chart of a Multiunit School of 600 Students 14

2 The Social System 26

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ABSTRACT

A system of Individually Guided Education in the Multiunit Elementary School (IGE/MUS-E), developed at the Wisconsin Research and Development Center, organizes the school into Instruction and Research Units (I&R Units) headed by a new role--that of unit leader. This study determined the extent of agreement among and between principals, teachers, and unit leaders regarding expectations held for the unit leader role; examined the relationship between referent group agreement and performance effectiveness ratings; and investigated the relationship between selected organizational variables and agreement on role expectations.

Social systems theory was utilized in hypothesizing that 1) no differences exist between principals, teachers, and unit leaders regarding expectations held for the unit leader role, and 2) there is a positive relationship between agreement on role expectations and ratings of performance effectiveness.

Tasks typically performed by unit leaders were identified from the literature and practice and reduced to a survey instrument containing 56 tasks. The Unit Leader Role Analysis (ULRA) was pilot tested for validity and reliability and factor analyzed into four scales dealing with intraorganizational relationships, extra-organizational relationships, instructional coordination, and

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management activities. Data were collected from a sample of 48 principals, 48 unit leaders, and 96 teachers from 48 schools in 32 Wisconsin districts.

Descriptive data were obtained to present a demographic profile of the sample. Differences among respondent groups in role expectations were analyzed by one-way analysis of variance for each scale of the ULRA. T-tests were performed for each scale between all possible combinations of groups when the f value produced by analysis of variance proved significant. Relationships between the extent of agreement on expectations, ratings of performance effectiveness, and selected organizational variables were tested by means of the Pearson product-moment correlation coefficient. Correlations were computed using both sign and absolute difference scores for each scale of the instrument. The probability level for all tasks of statistical significance was established at .05.

The major findings of the study were as follows:

1. Statistically significant differences were found among principals, teachers, and unit leaders in expectations held for the unit leader role on tasks dealing with instructional coordination and intraorganizational relationships.
2. A statistically significant difference was found between principals and unit leaders for tasks dealing with instructional coordination.
3. Statistically significant differences were found between principals and unit teachers for tasks related to instructional coordination and intraorganizational relationships.

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4. No significant relationship was established between referent group agreement on unit leader role expectations and ratings of unit leader performance effectiveness.
5. A statistically significant relationship was found between principal and unit leader agreement on expectations for tasks dealing with management activities and principal ratings of unit leader overall effectiveness.
6. A statistically significant relationship was found between unit leaders and teacher agreement on expectations for tasks related to instructional coordination and teacher ratings of unit leader overall effectiveness.
7. Principal and unit leader agreement on role expectations regarding extraorganizational relationships was significantly correlated with staff participation in orientation activities prior to implementing IGE.

In terms of theory and research it was suggested that social systems theory is useful, that better measures of role effectiveness are needed, and that case and longitudinal studies in these domains should be conducted. Concerning practice, it was suggested that principal, teacher, and unit leader communication should be increased; that the organizational model and unit leader role be further refined; and that the factors of the ULRA be examined for their relevance to problems in selection, training and operation of IGE/MUS-E schools.

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CHAPTER I

ORIENTATION TO THE STUDY

The purpose of this study was to examine the role of the unit leader in conducting unit functions. Specifically the study was designed to: 1) determine the differences that exist in role expectations held for unit leaders in conducting unit functions as perceived by principals, unit leaders and unit teachers; 2) determine the relationship between agreement on expectations and ratings of performance effectiveness; and 3) determine the relationship between agreement on expectations and selected organizational variables.

The study is divided into four chapters which consider, generally: 1) the problem and review of the literature, 2) design and methodology, 3) analysis of the data, and 4) findings, conclusions, and implications. This chapter consists of five sections which discuss the general background of the study, statement of the problem, review of related literature, significance of the study, and limitations of the study.

General Background

Schools traditionally have been organized as bureaucracies whose accompanying authority structures have

prescribed that the building principal should have the exclusive right to formulate all decisions and procedures relative to school operations. Specifically, during the past decade, teachers have been insisting that, because of their professional preparation, they should be given the right and responsibility for determining instructional practices. Parallel to this movement, national committees, university personnel, state departments and local school districts have been making concerted effort toward the end of developing "new curricula" which conform to the structural framework proposed by Bruner[1] and the methodological/organizational frameworks proposed by Beggs and Buffie,[2] Brown,[3] Dufay,[4] and Goodlad and Anderson.[5] Trump[6] has advocated

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[1] Jerome S. Bruner, The Process of Education, New York: Random House, 1960.

[2] David W. Beggs, III, and Edward G. Buffie, Nongraded Schools in Action, Bloomington, Indiana: Indiana University Press, 1967.

[3] B. Frank Brown, The Appropriate Placement School: A Sophisticated Nongraded Curriculum, West Nyack, New York: Parker, 1965.

[4] Frank R. Dufay, Ungrading the Elementary School, West Nyack, New York: Parker, 1966.

[5] John I. Goodlad and Robert H. Anderson, The Nongraded Elementary School: Revised Edition, Chicago: Harcourt, Brace and World, 1963.

[6] J. Lloyd Trump, Focus on Change-Guide to Better Schools, Chicago: Rand McNally, 1961.

that successful implementation of these "new curricula" requires a structural reorganization of schools together with a change in instructional methodology.

Alternatives to the traditional bureaucratic organization of schools[7] and the age/graded self-contained classroom approach to instruction were needed to facilitate accomplishment of these goals. Educational plans are being researched, developed, tried, and evaluated in response to these emerging social and institutional demands. The individually guided education (IGE) system,[8] which has been developed through the cooperative efforts of the Wisconsin Research and Development Center for Cognitive Learning (R & D Center) and local school systems, is designed to facilitate implementation of "new curricula" by reorganizing the structure of the elementary school and implementing the components necessary to provide a program of individually guided education for each student.

The organizational-administrative component of IGE is designed to provide for educational and instructional decisions at the levels they will be implemented. The new structure,

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[7] Michael B. Katz, Class, Bureaucracy and Schools, New York: Praeger Publishers, 1971.

[8] Herbert J. Klausmeier, et al., Individually Guided Education and the Multiunit Elementary School: Guidelines for Implementation, Madison: Wisconsin Research and Development Center for Cognitive Learning, 1971, pp. 17-30.

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designated the multiunit elementary school (MUS-E), divides the school into instructional and research units (I & R Unit) which are headed by a unit leader.

The prototypic model developed at the center places the unit leader position within this organizational structure as neither an administrator nor supervisor, but as a career teacher working in partnership with the principal and other unit staff members in conducting unit functions related to curriculum, instruction, staff development, research and development, innovation and diffusion.

The unit leader is the only new position created by the MUS-E model. The need for a unit leader can be defended for various reasons: to assist in the staff development necessary to change from a self-contained organizational structure and a group-centered approach to instruction to a unitized organizational structure and an individualized approach to instruction, to provide leadership in instructional coordination, and to facilitate organizational relationships.

Due to varying descriptions and definitions in the literature it was considered essential that empirical research be conducted which focuses on describing and defining the role of the unit leader and the relationship of these role expectations to performance effectiveness and selected organizational variables. Such was the purpose of this study.

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Statement of the Problem

This study was designed to investigate and identify the role expectations and performance effectiveness of the unit leader in conducting unit functions. The purpose of the study was twofold: 1) to determine the extent of agreement regarding expectations held for the unit leader role, and 2) to establish the relationship between referent group agreement on role expectations and performance effectiveness ratings. It was hypothesized that there is a positive relationship between agreement on role expectations and the performance effectiveness of the unit leader.

The major problems investigated in this study are stated in the following null hypotheses:

1. There are no significant differences between principals and unit leaders regarding role expectations held for the unit leader in conducting unit functions.
2. There are no significant differences between principals and unit teachers regarding role expectations held for the unit leader in conducting unit functions.
3. There are no significant differences between unit leaders and unit teachers regarding role expectations held for the unit leader in conducting unit functions.

4. There is no significant relationship between principal and unit leader agreement on expectations held for the unit leader's role and principal's ratings of the unit leader's performance effectiveness.
5. There is no significant relationship between unit teacher and unit leader agreement on expectations held for the unit leader's role and unit teachers' ratings of the unit leader's performance effectiveness.
6. There is no significant relationship between principal and unit teacher agreement on expectations held for the unit leader's role and their mean rating of the unit leader's performance effectiveness.

Data were also gathered to ascertain if a significant relationship exists between the following independent variables and referent group agreement on role expectations held for the unit leader in conducting unit functions:

a. Size of school system
b. Number of teachers in the unit
c. Age span of students in the unit
d. Number of students in the unit
e. Salary of the unit leader
f. Exposure to IGE concepts.

Review of Related Literature

Many plans have been proposed to revise the organizational structure and the curriculum of elementary schools. This section will review the literature which relates to the antecedents of IGE generally and the MUS-E component specifically as well as the literature describing IGE concepts and attempts to date to research it. Social systems theory and role theory will also be reviewed in establishing the theoretical basis for the study.

Antecedents of IGE - MUS-E

Klausmeier suggests that the historical antecedents to the multiunit elementary school are rooted in the nongraded school.[9] A nongraded organizational pattern was predominant in the American common school prior to 1840. The common school attempted to serve the needs of all pupils up to the completion of formal school.[10] Reformers of elementary education began a movement in the 1840's to reconstruct the common school into a graded pattern. However, this "movement toward the graded plan was gradual, resulting from influences of the Prussian School, increased enrollments,

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[9] Ibid., pp. 1-12.

[10] John D. Russell and Charles H. Judd, The American Educational System, Boston: Houghton Mifflin Co., 1940, p. 31-32.

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and the need to develop roles and responsibilities for the teachers."[11]

"The great impetus to the establishment of this graded class organization came from Horace Mann's 7th Annual Report, in 1844, on the graded school system of Prussia."[12] The publication of a graded textbook series also contributed to the development of the graded school. Tewksbury[13] credited the Quincy Grammar School, built in Boston in 1848, as being the first school designed from the start to provide separate classrooms for children at each age level.

The graded elementary school was thoroughly established by the post Civil War period and since that time various plans have been proposed to alter or abolish it. Brubacher points out that the fact gradually forced itself on educators that grading had not achieved as much homogeneity in the classrooms as had been anticipated. As a result of this, a number of experimental plans were proposed in the closing years of the nineteenth century and the early years

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[11] Charles F. Faber and Gilbert F. Shearron, Elementary School Administration: Theory and Practice, Chicago: Holt, Rinehart and Winston, Inc., 1970. p. 32.

[12] Ellwood P. Cubberly, Public Education in the United States, New York: Houghton Miffiin, 1934, p. 311.

[13] John L. Tewksbury, Nongrading in the Elementary School, Columbus, Ohio: Charles E. Merrill Books, 1967, p. 13.

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of the twentieth century that attempted to provide alternatives to the graded program. These included the Cambridge Plan, Santa Barbara Plan, Dalton Plan, and the Winnetka Plan, to mention a few.[14]

As late as 1949 the nongraded or ungraded concept was virtually a professional secret.[15] Since that time various innovations have been introduced which have been aimed at developing an ungraded school; however, each has approached the task on a piecemeal basis. These practices prompted Anderson to warn, "Unless teachers and administrators are aware of what constitutes a paragon to serve as a model for the effective nongraded school, even more schools will continue to make the mistakes and errors exhibited by the pseudo-nongraded schools now in existence."[16]

Individually Guided Education (IGE)

To meet this need a system of elementary education has been evolving since 1965. The system is claimed by its supporters to be a total system of education since it is an umbrella structure that provides a format for trying all

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[14] John S. Brubacher, A History of the Problems of Education, New York: McGraw-Hill Book Company, 1947, p. 399.

[15] Goodlad and Anderson, op. cit., p. 56.

[16] Robert H. Anderson, Teaching in a World of Change, Chicago: Harcourt, Brace and World, 1966, p. 51.

kinds of different teaching methods.[17] This system of individually guided education (IGE) has emerged for adoption in elementary schools across the nation as a result of the cooperative efforts of the Wisconsin Research and Development Center for Cognitive Learning and local school systems.[18]

The first three schools to implement IGE were cooperatively started in 1966. A significant forward thrust came when the Wisconsin State Department of Public Instruction selected the IGE model for statewide demonstration and installation in the 1968-69 school year. Accordingly, there were fifty multiunit schools in operation in Wisconsin in 1969-70.[19]

By the conclusion of the 1970-71 school year there were 164 multiunit schools operating in eight states. The U. S. Department of Health, Education and Welfare (HEW) selected the concept for nationwide installation in the

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[17] National School Public Relations Association, IGE: Individually Guided Education and the Multiunit School, Arlington, Virginia, 1972.

[18] E. Joseph Schneider, "R & D Helps Kids," Today's Education, Vol. 61, No. 7, October 1972, pp. 37-39 and 64-66.

[19] _____, "IGE, What Makes It So Popular?" The Education Digest, January 1973, p. 25.

1971-72 school year, and by the conclusion of that year there were well over 500 multiunit schools in eighteen states. There were over 1,000 multiunit schools by 1973 and some estimates indicate there may be 10,000 by 1976.[21]

The total design of IGE has evolved through systematic application of research and development strategies which have been aimed at the improvement of educational practices. IGE consists of seven components which are "designed to produce higher educational achievements through providing well for differences among students in rate of learning, learning style, and other characteristics."[22]

The seven major components of IGE are:

1. an organization for instruction, related administrative organization at the building level, and another arrangement at the central office level, together called the MUS-E.
2. a model of instructional programming for the individual student.
3. a model for developing measurement tools and evaluation procedures.

[20] Ibid., pp. 25-26.

[21] The Individualized Learning Letter, Huntington, New York: T.I.L.L., Vol. 2, No. 9, January 4, 1973.

[22] Herbert J. Klausmeier, et al., op. cit., p. 17.

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4. curriculum materials, related statements of instructional objectives, and criterion-reference tests and observation schedules.
5. a program of home-school communications that reinforces the school's efforts by generating the interest and encouragement of parents and other adults whose attitudes influence pupil motivation and learning.
6. facilitative environments in school buildings, school system central offices, state education agencies, and teacher education institutions.
7. continuing research and development to generate knowledge and to produce tested materials and procedures.[23]

MUS-E Component

The multiunit elementary school, (MUS-E), is the IGE component being investigated in this study. "The multiunit organization is considered to be the first realistic alternative in this century to the age-graded, self-contained classroom organization for instruction."[24] Limitations imposed by traditional elementary school organizations when attempting to implement IGE in traditionally organized schools

[23] Ibid., pp. 17-18.

[24] Ibid., p. 3.

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led to the development of the MUS-E component which has been designed to produce an organizational environment in which the other components can be successfully implemented.[25]

The prototypic model of the MUS-E delineates an organizational hierarchy at three distinct levels of operation which consist of a systemwide policy committee (SPC) at the district level, an instructional improvement committee (IIC) at the building level and an instructional and research unit (I&R) at the classroom level, which is the level of focus for this study.

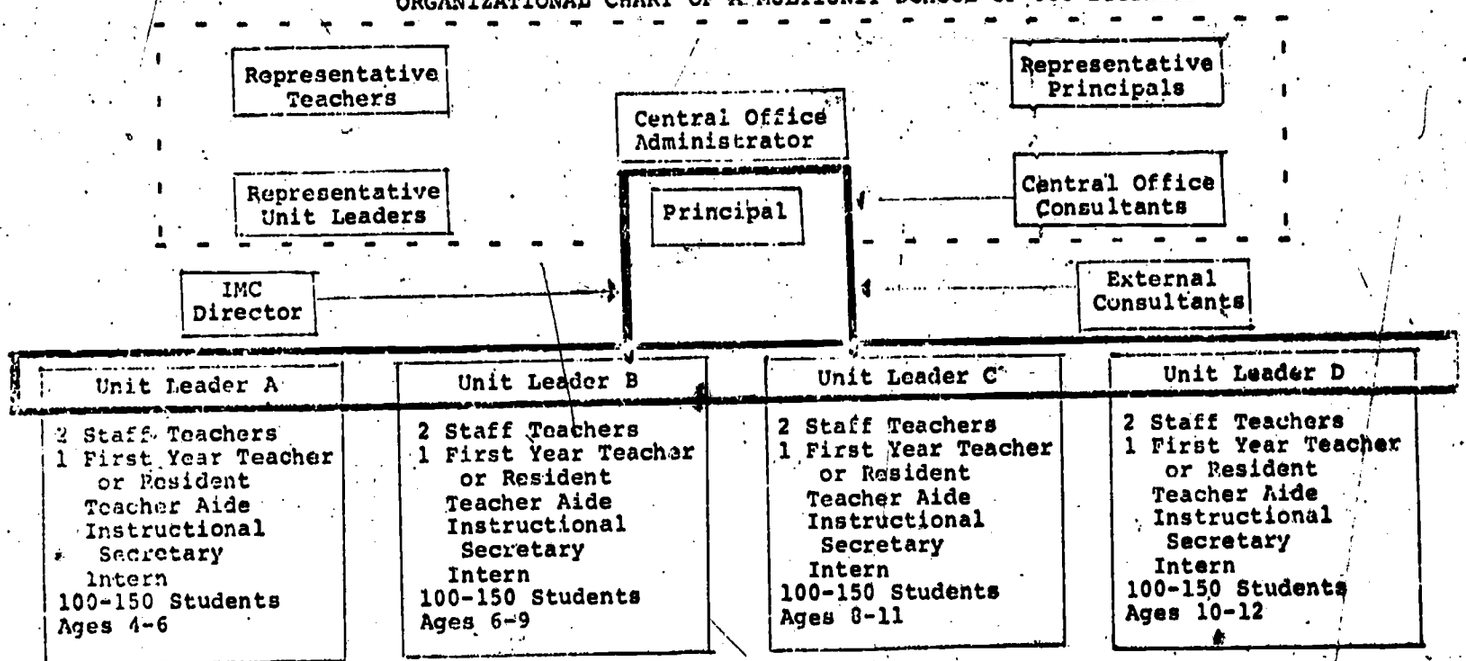
Figure 1 shows the prototypic organization of an MUS-E of 600 students. The figure shows that central office personnel, principals, unit leaders and teachers are all represented on the SPC. The IIC is comprised of the building principal and the unit leaders, and provision is made to include both external consultants and the director of the school's instructional materials center (IMC). The individual I&R units are staffed by a combination of the unit leader, teachers, aides, and possibly interns.

In the prototypic model of the MUS-E, the building principal's traditionally exclusive responsibility for making decisions related to planning and coordinating instructional activities is the shared responsibility of the principal

[25] Ibid., p. 4-5.

FIGURE 1

ORGANIZATIONAL CHART OF A MULTIUNIT SCHOOL OF 600 STUDENTS



Building Instructional Improvement Committee

Systemwide Policy Committee

Note. - This figure was reproduced from a book by Klausmeier, et al., INDIVIDUALLY GUIDED EDUCATION AND THE MULTIUNIT ELEMENTARY SCHOOL: GUIDELINES FOR IMPLEMENTATION, p. 21.

and the unit leaders. The theoretical justification for this mode of operation is based upon two fundamental concepts which underpin the multiunit pattern:

1. Group interaction can produce a total effect greater than the sum of its parts:
2. A hierarchy of decision-making bodies, i.e., the unit staff and the IIC, . . . places decisions in the hands of those most able to make the decisions.[26]

It is the Center's expectation that schools adopting the IGE/MUS-E program will achieve the goals identified for learners as a direct result of utilizing the practices and procedures contained in the model.[27]

Related Research

Despite the development of the prototypic organizational model and specific statements regarding role functions, it is understandable that the potential of MUS-E will not be realized automatically by the establishment of guidelines for the organization's formal operations. Accordingly, a considerable amount of descriptive and empirical research is

[26]Joan Beugen, Ira Kerns and Norman Graper, Individually Guided Education: The Principal's Handbook, Dayton, Ohio: The Institute for Development of Educational Activities, 1971, p. 13.

[27]Klausmeier, op. cit., p. 91.

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presently being conducted, notably at the University of Wisconsin-Madison, which is aimed at refining the components of IGE as well as demonstrating their effectiveness. While it is recognized that research is being conducted on all components of IGE,[28] this review will limit itself to selected research that has been conducted on the organizational-administrative component (MUS-E).

Nelson[29] investigated the relationship of the MUS-E organizational pattern to the learning climate of schools using a semantic differential and school morale scale. Pupils in MUS-E schools scored significantly higher than pupils in traditional schools on learning climate, learner self-concept, and a number of non-academic attitude variables. No significant relationship was established between pupils in MUS-E schools and pupils in traditional schools regarding their attitude toward teachers, attitude toward school administration and staff, and attendance and tardiness. Essig[30] has

[28]Reference here is to Technical Reports 19, 35, 45, 46, 48, 52, 76, 107, 120, 123, 125, 147 and 158, and Working Papers 4, 7, 8, 21, 22, 23, 24, 26, 29, and 36, The Wisconsin Research and Development Center for Cognitive Learning.

[29]Richard G. Nelson, "An Analysis of the Relationship of the Multiunit School Organization Structure and Individually Guided Education to the Learning Climate of Pupils," Doctoral dissertation, Madison: University of Wisconsin, 1972.

[30]Don Moe Essig, "The Effects of a Multiunit Differentiated Staffing Organization Upon Teachers' Attitudes and Instructional Programs." Unpublished doctoral dissertation, University of Oregon, September, 1971.

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investigated the effect of MUS-E on teachers attitudes and instructional programs. He discovered that MUS-E schools had implemented and maintained a unit organization and had utilized their resulting collaborative teaching arrangements as the means for increasing learning opportunities for students.

Benka[31] studied the director of instruction's relationship to and his involvement in change and found that his involvement in the four variables of dissemination, demonstration, trial and installation as ranked by the director of instruction, the principal, and the unit leader was not significantly related to their achievement. Since the director of instruction is not perceived as a highly involved colleague in the implementation of MUS-E, it would appear that additional emphasis is being placed on the unit leader as a key position.

Loose[32] and Smith[33] have investigated the operational patterns of the IIC. Specifically, Loose discovered that the

[31]John T. Benka, "The Perception of the Director of Instruction as an Agent of Organizational Change: The MUS-E," Unpublished doctoral dissertation, Madison: University of Wisconsin, November 1971.

[32]Caroline Loose, "Decision-Making Patterns and Roles in the IIC," Doctoral Dissertation in Progress, Milwaukee: University of Wisconsin, 1972.

[33]Kenneth B. Smith, "An Analysis of the Relationship between Effectiveness of the Multiunit Elementary School's Instructional Improvement Committee and Interpersonal and Leader Behaviors," Unpublished doctoral dissertation, Madison: University of Wisconsin, 1972.

IIC was not carrying out the participative decision-making functions assigned it by the model as principals continued to make a majority of the decisions. Smith[34] established a significant multiple correlation between IIC effectiveness and six independent variables including leader consideration behavior, number of IIC members, number of hours an IIC meets, and compatibility in the affection, inclusion and control need areas of the FIRO-B. Since these studies indicate that the prescription of "shared decision-making" in the IIC cannot be automatically realized, it demonstrates that the IIC membership is a crucial link that must be made effective. Again, membership in the IIC consists of the principal and the unit leaders.

An evaluation study conducted by the Center indicated that role incumbents and organizational elements were not involved in many of the functions prototypically assigned them.[35] The report further indicated that the unit assumed responsibility for carrying out most of the functions related to the components of IGE. The crucial role of the unit leader is recognized to insure success.

[34]Ibid.

[35]Mary Quilling, "IGE-MU School Report," Wisconsin Research and Development Center for Cognitive Learning, University of Wisconsin, 1972.

The organizational characteristics of three multiunit and three control schools were compared in a descriptive research study conducted by Pellegrin.[36] Evidence was found in two of the three schools that there was considerable difference between the expected and actual functions of the IIC. No general agreement was found concerning the roles that should be emphasized in the unit leader position.

Pellegrin discovered that all three multiunit schools had a network of interdependence relationships in which the unit leader was observed to perform many of the management and coordination activities previously assumed by the principal. While Pellegrin found considerable variation in structure, policies, and practices, it was apparent that decision-making was moving to the unit level and the unit leader was emerging as both an authority and influence figure.

The studies previously cited indicate that the roles and functions prescribed by the prototypic multiunit organizational model are emerging ones in need of identification and clarification. Individuals can no longer act in isolation. The talents of all must be molded into a team in which the unit leader plays a focal role in orchestrating the elements to achieve effectiveness.

[36] Roland J. Pellegrin, "Some Organizational Characteristics of Multiunit Schools," Working Paper No. 22, Wisconsin Research and Development Center for Cognitive Learning, Madison: University of Wisconsin, 1969. And "Some Organizational Characteristics of Multiunit Schools." Technical Report No. 5. Eugene, Oregon: CASEA, University of Oregon, 1970.

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Clearly, the multiunit organization model represents a change of considerable magnitude for administering elementary schools. What role should the unit leader play in this newly created organizational pattern? The prototypic model views the role as being instructional, not administrative or supervisory. The research conducted by Pellegrin demonstrates that the position calls for three roles: instructional leader, administrator, and teacher. Further, Pellegrin indicated that all three must be performed capably if the unit is to function effectively. The apparent discrepancy between prototype and practice coupled with the paucity of investigation concerning the unit leader position points out a need for empirical research to focus on expectations and effectiveness if the potential of this role is to be realized.

The studies reviewed here represent the only existing empirical evidence known to the writer which deal with the operational characteristics of the MUS-E. However, other studies are currently being planned or conducted. Anderson[37] is investigating the effect of MUS-E structure on the behavior of supervisors and teachers who have responsibility in the selected curricular areas of art, music and physical education.

[37] Mildred Anderson, "The Behavioral Role of Professionals in Selected Curricular Areas in Five Types of Elementary School Organizational Structures," Doctoral dissertation proposal, University of Wisconsin, October 1972.

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Herrick[38] and Walter[39] have investigated the relationship of the MUS-E organizational structure to adaptiveness and teacher motivation. Evers[40] is examining the relationship between compatibility of unit members on interpersonal behaviors and the effectiveness of the I&R unit in performing the functions prototypically assigned to the unit. Arold[41] is attempting to identify the critical interactions and effects of change variables involved in institutionalizing MUS-E, and Paul[42] is exploring the linkages between sources of research and the users of research.

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[38]H. Scott Herrick, "Relationship of Organizational Structure to Teacher Motivation in Traditional and Multiunit Elementary Schools," Doctoral dissertation proposal, Madison: University of Wisconsin, Department of Educational Administration, 1972.

[39]James Walter, "The Relationship of Organizational Structure to Adaptiveness in Elementary Schools," Doctoral dissertation proposal, University of Wisconsin, 1972.

[40]Nancy A. Evers, "An Analysis of the Relationship Between the Effectiveness of a Multiunit Elementary School's Instruction and Research Unit and interpersonal Behaviors," Doctoral dissertation proposal, University of Wisconsin, September, 1973.

[41]Nancy J. Arold, "The Development of a Qualitative Model for Determining How to Institutionalize Educational Innovations," Doctoral dissertation proposal, University of Wisconsin, January, 1973.

[42]Douglas A. Paul, "The Diffusion of an Innovation Through Interorganizational Linkages: A Comparative Case Study," Doctoral dissertation proposal, University of Wisconsin, February, 1973.

Theoretical Framework

Administrative theory has progressed through the managerial, human relations and social science stages of emphasis.[43] Managerial emphasis gave primary attention to maximizing the output of workers by providing economic rewards and an organization which was characterized by a clearly defined division of labor, specialized personnel and a distinct hierarchy of authority.[44] The concept involved knowing what was to be done and then assuring its accomplishment in the best and cheapest manner possible. The central contribution to the managerial emphasis was made by Frederick W. Taylor.[45]

Human relations emphasized the individual in the organization.[46] The human relations school therefore found it necessary to stress the role of communication, participation, and leadership.[47] The works of Mayo, which concentrate on coordination between workers and management and motivation

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[43]Jacob W. Getzels, James M. Lipham and Roald F. Campbell, Educational Administration as a Social Process, New York: Harper & Row, 1968, p. 23.

[44]Ibid., pp. 23-30.

[45]Frederick W. Taylor, Scientific Management, New York: Harper & Row, 1911.

[46]Amitai Etzioni, Modern Organizations, Englewood Cliffs, New Jersey: Prentice Hall, 1964, p. 20.

[47]Ibid., p. 32.

of workers, clearly demonstrate the goals of the human relations approach.[48]

The social science approach attempts to place the individual in the organization and study the resulting environment. The impersonal nature of the organization is recognized and it is accepted that there are sharp limitations to the degree to which this can be overcome.[49] Barnard's contributions are credited with establishing much of the foundation for the social science approach.[50]

Social Systems

Social systems theory was selected as the theoretical framework for this study because of its applicability to the problem being investigated. Social systems theory, as originally proposed by Parsons[51] has been refined and expanded to include the field of educational administration

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[48] Elton Mayo, The Human Problems of an Industrial Civilization, New York: Macmillan, 1933.

[49] Etzioni, op. cit., pp. 40-42.

[50] Chester I. Barnard, The Functions of the Executive, Cambridge: Harvard University Press, 1938.

[51] Talcott Parsons, The Social System, New York: Free Press, 1951.

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by Getzels and Guba[52] and Getzels and Thelen.[53] Parsons' application of social systems theory to educational organizations has influenced several recent writers on the subject. Getzels, Lipham and Campbell have summarized some of Parsons' assumptions and concepts in an attempt to demonstrate his influence on recent writers:

1. Social action is goal directed, and simple stimulus-response theories are inadequate to account for the facts of such action.
2. As a symbol-using animal, man is able to generalize from experience and to stabilize patterns of behavior through time.
3. These patterns may be analyzed most fruitfully in terms of systems.
4. Social action itself may be seen as a system representing a "compromise" in the interactions of the cultural, organic, personal, and social subsystems.
5. Although perfect integration is probably unattainable, no system of action can survive unless the component subsystems are mutually consistent within some degree of tolerance.
6. In view of the strain toward inconsistency among the interconnecting systems, there is need for coordination within an action

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[52] Jacob W. Getzels and Egon G. Guba, "Social Behavior and the Administrative Process," School Review, 1965, pp. 423-41: Winter 1957.

[53] Jacob W. Getzels and Herbert A. Thelen, "The Classroom Group as a Unique Social System," Chapter IV in The Dynamics of Instructional Groups, Fifty-Ninth Yearbook of the National Society for the Study of Education, Part II, Chicago: University of Chicago Press, 1960.

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system so that there may be "continual action in concert."

7. The need for close coordination is most clearly seen in an organization.

8. It is not sufficient for members of action systems to share cognitive and cathectic standards; they must also share value standards.[54]

Figure 2 illustrates the Getzels and Guba[55] adaptation of the social systems model that is utilized in this study for identification of the role, role expectations, and effectiveness of the unit leader in conducting unit functions. The model is applicable regardless of the level or magnitude of the system under consideration. The model is conceptual rather than descriptive. It presumes that interpersonal or social behavior may be viewed as functioning within the context of a social system. The school is conceived as a social system for the purpose of this study.

This social systems model consists of at least two major classes of phenomena which are, at the same time conceptually independent and phenomenally interactive.[56] In

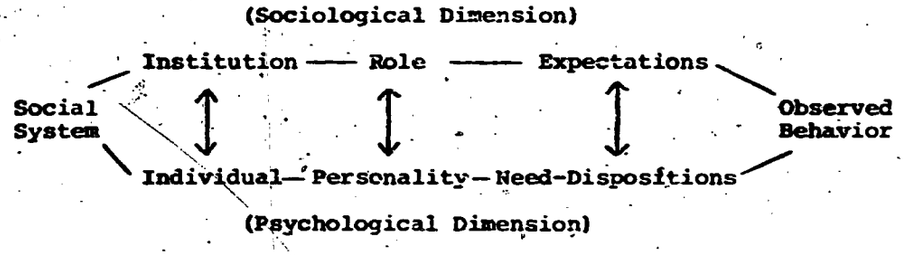
[54] Getzels, Lipham and Campbell, op. cit., pp. 48-49.

[55] Getzels and Guba, op. cit.

[56] Jacob W. Getzels, "Administration as a Social Process," Administrative Theory in Education, Andrew W. Halpin, ed., Chicago: Midwest Administration Center, University of Chicago, 1958, pp. 150-65.

FIGURE 2

THE SOCIAL SYSTEM



one dimension are institutions with certain roles and expectations that fulfill the goals of the system; in the other are individuals with certain personalities and need-dispositions inhabiting the system.

Behavior can be depicted as a function of two major analytic elements: 1) institution, role, and expectations which collectively form the nomothetic or normative dimension of activity within a social system; and 2) individual, personality, and need-disposition, which together refer to the idiographic or personal dimension of activity. The nomothetic dimension may be considered as the sociological level of analysis; the idiographic as the psychological.[57]

[57] Jacob W. Getzels, "Theory and Practice in Educational Administration: An Old Question Revisited," in Administrative Theory as a Guide to Action, ed. Roald F. Campbell and James M. Lipham, Chicago: Midwest Administration Center, University of Chicago, 1960, p. 50.

The relationships between the two dimensions are also portrayed in Figure 2.

The model identifies and allows us to examine various types of potential conflict situations in a social system setting. Conflict has been defined as simply "the mutual interference of parts, actions, and reactions in the social system."[58] Conflicts arising from personality, role, role-personality, and perceptual error may be examined by the basic model. The model has been expanded to allow examination of biological, economic, cultural and political conflicts as well. This study has examined potential conflicts existing as a result of varying expectations held by referent groups for the unit leader role.

Role

The term, role, has received a multitude of definitions, however, the classic reference point for a definition of role is Linton:

> A role represents the dynamic aspect of a status. The individual is socially assigned to a status and occupies it with relation to other statuses. When he puts the rights and duties which constitute the status into effect, he is performing a role.[59]

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[58] Getzels, Lipham and Campbell, op. cit., p. 108.

[59] Ralph Linton, The Study of Man, New York: D. Appleton Century Co., 1936, p. 114.

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Linton therefore viewed role and status as being inseparables although role is defined as that aspect of a status which can be learned and performed rather than occupied.[60] Linton enlarged upon his definition in a later work when he designated to role ". . . the sum total of culture patterns associated with a particular status."[61]

Three distinct categories of usage for role were identified by Getzels, Lipham and Campbell. First, the process of socialization causes people to assume roles associated with sex and age. Secondly, role has been regarded as synonymous with patterns of observed behavior in society. Thirdly, roles may be thought of as the structural or normative elements defining the behavior expected of role incumbents.[62]

It is the third usage of role which concerns the behavior of persons and its relation to others in a social system that is useful for the purpose of this study. Viewed in this context roles are institutional givens since they normally exist before the actors who will fulfill them are known and thus they can be separated from personality

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[60] Ibid., p. 115.

[61] Ralph Linton, The Cultural Background of Personality, New York: D. Appleton-Century, 1945, p. 77.

[62] Getzels, Lipham and Campbell, op. cit., p. 60.

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for the purpose of examination. While only the normative determinant of behavior is analyzed when role is viewed in this manner that is considered the proper level of abstraction for this type of analysis and understanding.[63]

Roles are defined in terms of role expectations, the normative rights and duties which define within limits what a person should or should not do under various circumstances as long as he is the incumbent of a particular role within an institution.[64] This expanded concept of role pertains to the behavior of role incumbents and is the set of prescriptions defining what the behavior of a position member is or should be in interrelationships with other roles.[65]

Role expectations derive from historical - legal antecedents, the professional literature, and school district policies.[66] The expected behaviors can be thought of as extending along a centinuum from "required" or "absolutely must" to "prohibited" or "absolutely must not."

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[63] Ibid., p. 64.

[64] Getzels, Administrative Theory as a Guide to Action, op. cit., p. 153.

[65] Edwin John Thomas and Bruce Jesse Biddle (eds.), "Basic Concepts for Classifying the Phenomena of Role," in Role Theory: Concepts and Research, New York: John Wiley and Sons, 1966, pp. 29-32.

[66] James M. Lipnam and James A. Hoeh, Jr., The Principalship: Foundations and Functions, New York: Harper & Row, In press.

Alternative methods have been developed for operationalizing role expectations. The most common, and the one used in this study, is the task approach. In the task approach, the role is described in terms of the tasks to be performed by a role incumbent as perceived by the role incumbent and significant reference groups.[67]

Understandably, differences exist in the expectations that various groups or individuals hold for a particular role. These differences have been classified as being intraceptive, communicative, and existential in nature. Intraceptive differences are due to lack of congruence between what the role incumbent perceives alter group expectations to be and his self-expectations. Communicative differences are due to a lack of congruence between what the alter group actually expects and what the role incumbent thinks they expect. Existential differences are caused by a lack of congruence between the role incumbent and alter groups regarding such variables as philosophy, age, training, experience and values.[68] This study has focused on identifying existential differences relating to the unit leader role.

Effectiveness

"Organizations are social units or human groupings deliberately constructed and reconstructed to seek specific

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[67] Ibid.

[68] Ibid.

goals."[69] Accomplishing the goals of the organization and fulfilling the needs of the personalities within the organization have consistently been recognized as the two basic goals or purposes of all organizations.[70] These two goals have been illustrated in several different ways but, the meaning remains much the same.

Barnard[71] used the term effectiveness to describe the accomplishment of the cooperative purpose of the organization. He viewed this as being social and non-personal in character. Efficiency was viewed as personal in character and related to satisfaction of individual motives. Roethlisberger and Dickson[72] created a dichotomy based on producing a product and creating and distributing satisfaction among individual members. Based on the social system model as perceived by Getzels and Guba[73] effectiveness would relate to the nomothetic or task achievement dimension and efficiency to the

[69] Talcott Parsons, Structure and Process in Modern Societies, Glencoe, Ill.: Free Press, 1960, p. 17.

[70] Richard C. Lonsdale, "Maintaining the Organization in Dynamic Equilibriam," Part II of the NSSE 1964 Yearbook, pp. 142-148.

[71] Barnard, op. cit.

[72] Fred J. Roethlisberger and William J. Dickson, Management and the Worker, Cambridge: Harvard University Press, 1939.

[73] Getzels and Guba, op. cit.

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ideographic or need satisfaction dimension. As indicated previously, this study has concerned itself with the relationship between agreement on role expectations and perceived effectiveness of the unit leader in conducting unit functions.

In an expanded definition, Georgopoulos and Tannenbaum have defined effectiveness as ". . . the extent to which an organization as a social system, given certain resources and means, fulfills its objectives without placing undue strain upon its members or incapacitating its means and resources."[74] Etzioni concurred, ". . . actual effectiveness is determined by the degree to which it realizes its goals."[75] Optimum operation depends on both effectiveness and efficiency.

The actions or activities of individuals in an organization which are aimed at the accomplishment of organizational goals have been termed functions.[76] Central to successful accomplishment of functions is the fact that participants agree as to what functions or tasks are necessary. Disagreement among participants in a social system as to what functions are necessary is detrimental to organizational productivity. Likewise, disagreement on functions denotes

[74] Basil S. Georgopoulos and Arnold Tannenbaum, "A Study of Organizational Effectiveness," Readings on Modern Organizations, edited by Amaiti Etzioni, Englewood Cliffs, N. J.: Prentice-Hall, Inc., 1969.

[75] Etzioni, op. cit., p. 8.

[76] Georgopoulos and Tannenbaum, op. cit.

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role conflict since the role incumbent is expected simultaneously to conform to conflicting sets of expectations. Such role conflict has been shown to be detrimental to individual effectiveness.

Individual effectiveness which contributes to organizational effectiveness is the concern of this study. The criterion for individual effectiveness has usually been the objective behavior of the individual being rated--or so it is thought.[77] However, a measure of behavior along is insufficient. The criterion must be behavior relative to the expectations held by the rater; therefore effectiveness cannot be judged except in relation to the expectations held by the rater. An important consequence that follows is the possibility that the same behavior may be judged effective or ineffective by the same person, or by separate groups, if different expectations are applied to the behavior.[78]

In this study effectiveness will be judged by the performance of unit leaders in conforming to role expectations as perceived by principals and unit teachers. Therefore, effectiveness in this study is the extent to which the unit leader's on-the-job behavior or performance corresponds to the expectations held for the role. In short, effectiveness

[77] Getzels, Lipham and Campbell, op. cit., p. 128.

[78] Getzels and Guba, School Review, op. cit., pp. 433-34.

is a measure of the concordance of role behavior and role expectations.[79]

Related Research

The utility of the social systems model is well established when judged by the plethora of investigations it has prompted. The investigations based on social systems which have examined the nature of expectations held for various roles in the educational setting are legion. Further, numerous studies have related agreement on expectations to effectiveness. The writer knows of no studies conducted to date which have focused on the emerging role of the unit leader. Therefore, the research reviewed here is selective in attempting to provide focus for this study.

Role conflict results when a role incumbent is required to conform simultaneously to two or more conflicting role expectations which are mutually exclusive, contradictory, or inconsistent so that adjustment to one makes adjustment to the other difficult or impossible.[80] While several types of conflict have been identified, the primary focus in this study has been conflict which was caused by differences in expectations held for the unit leader role by principals,

[79] Getzels, Lipham and Campbell, op. cit., p. 129.

[80] Getzels, Administrative Theory in Education, op. cit., p. 161.

unit teachers and unit leaders and the relationship of such differences with ratings of performance effectiveness. Studies which examine two types of conflict will be reviewed here: 1) conflict among several reference groups, or interreferrence-group conflict, and 2) conflict within a single reference group or intrareference-group conflict.

Hencley[81] examined the expectations held for the superintendency by three different reference groups both inside and outside the school and analyzed disagreements not only in major task areas, but with respect to generalized roles as well. The superintendent was asked forced choice questions concerning the expectations of the members of various reference groups with regard to his performance of specific tasks of administration. Members of the reference groups were subsequently interviewed and their actual expectations for the superintendent's role were obtained. The superintendent's perception of others' expectations was then compared with the actual expectations of members of the reference groups. Hencley found that significant differences existed among the several referent groups with regard to their expectations for the superintendent's role.

[81]Stephen P. Hencley, "The Conflict Patterns of Superintendents," Administrator's Notebook, Vol. 8, No. 9, May 1960.

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Cheal[82] and Moser[83] examined conflicting expectations for the principal's role. Cheal studied conflicts which resulted from differing expectations held by superintendents, teachers and parents for the principal's role. The several referent groups held significantly different expectations for the principal's role. Moser interviewed teachers, principals and superintendents with regard to their expectations for principals' leadership behavior. He concluded that the principal is in a delicate position because each referent group holds different expectations for his leadership role. The principal is a member of two organizational families. His role is of key importance as a connecting link between the superintendent and the teachers. In the same way that the superintendent of schools is the middle-man between the board of education and the professional staff, the principal serves as the middle-man between the superintendent and the teaching staff. The principal's behavior was found to vary depending on which group he was interacting with.

Several other studies have investigated interreference group conflicts regarding expectations held for the principal

[82]John E. Cheal, "Role Conflict in the Principalship of the Composite High School," Master's thesis, University of Alberta, 1958.

[83]Robert P. Moser, "The Leadership Patterns of School Superintendents and School Principals," Administrator's Notebook, Vol. VI, September 1957, p. 4.

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role. Frazier[84] sought to identify the expectations of superintendents, principals and teachers for the principal role. Twenty-seven major differences were discovered which extended across several role functions. These differences existed primarily between superintendents and teachers.

Carlson[85] obtained perceptions of teachers, principals, and superintendents regarding sixty commonly accepted tasks of elementary principals and concluded that agreement of perceptions on many of the tasks was lacking. Falzetta[86] compiled a list of forty-seven role items and used it to solicit the expectations held by superintendents, principals and teachers for the principal role. He discovered significant conflicts in expectations for the principal's role on twenty of the forty-seven items.

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[84]Calvin Morton Frazier, "Role Expectations of the Elementary Principal as Perceived by Superintendents, Principals and Teacher." Unpublished Doctoral dissertation, University of Oregon, 1964.

[85]Russell Stanford Carlson, "Actual and Ideal Role Perceptions of the Elementary Principal as Seen by Superintendents, Teachers and Elementary Principals." Unpublished Doctoral dissertation, Montana State University, 1971.

[86]John N. Falzetta, "Role Expectations Held for the Elementary Principal by Teachers, Principals, and Superintendents in New Jersey," Unpublished Doctoral dissertation, Temple University, 1967.

Lansing[87] and Farthing[88] have studied the perceived role expectations held for the school business manager by school personnel. Lansing used a task approach to identify relationships between role expectations and ratings of performance effectiveness of the school business administrator in performing tasks related to the instructional program. He found a significant lack of agreement on perceptions of tasks performed and no relation between agreement on expectations and effectiveness ratings except when combined principal-superintendent ratings were considered. Farthing utilized a Q-sort analysis in determining that there are sharply delineated differences centering around the business administrator's involvement in the educational realm as viewed by various school personnel.

Several studies deal with the role of instructional supervisors. Carlton[89] sought to determine the actual and ideal role of instructional supervisors as perceived by principals and teachers. Few similarities were found between

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[87]Louis Paul Lansing, "Relationship Between Role Expectations and Performance Effectiveness of the School Business Administrator." Unpublished Doctoral dissertation, The University of Wisconsin, 1971.

[88]Kenneth Joel Farthing, "A Q-Sort Analysis of the Role of the Business Manager as Perceived by School Personnel," Unpublished Doctoral dissertation, The University of Iowa, 1969.

[89]Cecil Glover Carlton, Jr., "Role of Instructional Supervisors as Perceived by Teachers and Principals in Selected Florida Elementary Schools," Unpublished Doctoral Dissertation, The Florida State University, 1970.

the actual and ideal role of a supervisor, and the greatest differences existed between principals and teachers. Marchak[90] used data from instructional supervisors, principals and teachers to determine the congruence in role expectations for the instructional supervisor's role. A lack of congruence was established for all five areas of supervisory responsibility. Cardenas[91] conducted a study in which he investigated both intergroup and intragroup consensus on role expectations for instructional supervisors. None of the three groups studied showed a significant disagreement regarding the role expectations they held for the instructional supervisor position.

Studies have also been conducted regarding the role of educational consultants. Maire[92] in a study of the school architect's role, found no relationship between agreement on role expectations and satisfaction with services rendered.

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[90]Nick Marchak, "The Role Expectations for the Supervisor of Instruction as seen by Supervisors of Instruction, Teachers and Principals." Unpublished Doctoral dissertation, University of Oregon, 1969.

[91]Jose Angel Cardenas, "Role Expectations for Instructional Supervisors as Expressed by Selected Supervisors, Administrators, and Teachers." Unpublished Doctoral dissertation, The University of Texas, 1966.

[92]Marvin H. Maire, "Expectations for the Architect's Role Related to Satisfaction with Architectural Services," Unpublished Doctoral dissertation, University of Wisconsin, 1965.

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Ferneau[93] investigated the role expectations held by administrators for consultants and discovered that consultants and administrators must perceive each other functioning in the manner they expect if the consultant is to be judged effective.

These studies are representative of the growing body of research regarding role expectations in the educational setting. They demonstrate clearly a lack of congruence regarding expectations even for well-established roles such as the principal. It is considered important therefore to gather empirical data for identifying the emerging role of the unit leader.

Significance of the Study

This study provides additional information concerning one aspect of the administrative-organizational component of IGE--the perceptions of Wisconsin principals, teachers, and unit leaders regarding the unit leader role. The major significance of the study is its potential for improving the effectiveness of MUS-E in providing appropriate instruction for the individual learner by identifying potential sources of interreference-group conflict in order that they may be resolved.

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[93]Elmer Ferneau, "Role Expectations in Consultations." Unpublished Doctoral dissertation, University of Chicago, 1954.

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The study will provide input for refining the differentiated staffing model of MUS-E, since knowledge concerning the unit leader role will better enable unit leaders to evaluate their individual performance relative to the expected performance perceived for the position by referent groups. Knowing the expected role as well as the areas in which he is performing effectively, will assist the unit leader in working with principal and teacher referent groups.

The study will also provide input in determining the skills and competencies to be required for certification of unit leaders and for establishing preservice and inservice education for unit leaders. Finally, the study is significant for the contributions it will make in the selection and utilization of unit leaders as well as the practical contributions it will make to the participant districts in developing job descriptions for unit leaders and establishing compatible interaction patterns among principals, teachers, and unit leaders.

Limitations of the Study

This study is limited to elementary schools in Wisconsin that implemented the multiunit mode in the fall of 1971. Therefore, the results cannot be generalized beyond that population. Respondent groups are not exhaustive of the respondent groups with whom the unit leader interacts and the role items are not exhaustive of the tasks a unit

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leader may perform in a particular school. Finally, the study is limited by the fact that honesty and sincerity of response become issues whenever an instrument is presented for a written response.

Summary

This chapter has placed the study in historical perspective by tracing the antecedents of current attempts to ungrade the elementary school and individualize instruction. The components of IGE and their interrelationships were presented and the unit leader was defended as a focal position in the MUS-E organizational structure. Research studies dealing with the MUS-E structure were reviewed and discrepancies between prototype and practice were noted.

Social systems was defined and presented as the theoretical base for the study. Research reviewed regarding the normative dimension demonstrated the utility of social systems theory for understanding and assessing behavioral outcomes in terms of effectiveness and defining roles in terms of expectations. The significance and limitations of the study were presented as well. Chapter II will present the design and methodology of the study.

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CHAPTER II

DESIGN AND METHODOLOGY

This chapter provides a description of the study's methodology and the statistical design utilized in analyzing the data. The chapter is composed of seven sections which include, respectively, 1) the statement of the problem, 2) the hypotheses and ancillary questions, 3) the definition of terms, 4) the development of the survey instrument, 5) the study population and sample, 6) the data collection procedures, and 7) the data treatment employed in the study.

Statement of the Problem

The purpose of this study was to examine the perceived role expectations and effectiveness of the unit leader in conducting unit functions. Specifically, the study investigated the differences that may exist in role expectations held for unit leaders in conducting unit functions as perceived by principals, unit leaders, and unit teachers. It also related agreement on expectations to ratings of unit leader performance effectiveness. The relationship of agreement on expectations to several organizational variables and to exposure to IGE/MUS-E concepts was also investigated.

Hypotheses

The focus of this study was on the relationship of role expectations to performance effectiveness of unit leaders. The following hypotheses were tested:

1. There are no significant differences between principals and unit leaders regarding role expectations held for the unit leader in conducting unit functions.
2. There are no significant differences between principals and unit teachers regarding role expectations held for the unit leader in conducting unit functions.
3. There are no significant differences between unit leaders and unit teachers regarding role expectations held for the unit leader in conducting unit functions.
4. There is no significant relationship between principal and unit leader agreement on expectations held for the unit leader's role and principal's ratings of the unit leader's performance effectiveness.
5. There is no significant relationship between unit teacher and unit leader agreement on expectations held for the unit leader's role and unit teachers' ratings of the unit leader's performance effectiveness.

6. There is no significant relationship between principal and unit teacher agreement on expectations held for the unit leader's role and their mean ratings of the unit leader's performance effectiveness.

Ancillary Questions

The following ancillary questions were investigated:

1. Is there a relationship between the size of the district and congruence regarding the role expectations held for the unit leader?
2. Is there a relationship between the number of professional staff members assigned to a unit and congruence regarding role expectations held for the unit leader?
3. Is there a relationship between the age span of students assigned to a unit and congruence regarding the role expectations held for the unit leader?
4. Is there a relationship between the number of students assigned to a unit and congruence regarding the role expectations held for the unit leader?
5. Is there a relationship between the amount of salary provided unit leaders for conducting unit functions and congruence regarding the role expectations held for the unit leader?

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6. Is there a relationship between exposure to IGE/MUS-E concepts and congruence regarding expectations held for the unit leader role?

Definition of Terms

For the purpose of this study, the following definitions were used:

1. Individually Guided Education (IGE)--an educational process that uses clearly stated discrete learning objectives, individually tailored learning activities, and an ongoing system of assessment that monitors the performance of each elementary school child.
2. Multiunit Elementary School (MUS-E)--one in which the organizational pattern is divided into instructional units. These instructional units consist of a unit leader (lead teacher), unit teachers, aides, student teachers or interns if available, and 75-150 pupils. MUS-E involves a nongraded approach to curriculum design, a multi-aged pupil population, and learning programs designed for individual pupils.
3. Unit leader--a career teacher who is assigned responsibilities for coordinating the staff and resources of an instructional unit which provides appropriate instructional activities for a group of multi-aged elementary children.

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4. Unit teacher--a certified teacher, assigned to work as a professional staff member in a unit, having responsibility for planning with other members of the unit the instructional activities for a group of multi-aged elementary pupils.
5. Role--dynamic aspects of a position, office, or status within an organization, including the total of cultural patterns associated with a particular status position. It includes attitudes, values, and behaviors ascribed by the society to any and all persons occupying this status.
6. Role behavior--describes the social behavior of an individual who performs in accordance with a role set, adapting his behavior to the role demands placed upon him. In this case, the focal role is that of the unit leader interacting with significant others in conducting unit functions.
7. Role expectations--rights and duties, the normative obligations and responsibilities associated with a role . . . that delineate what a person should or should not do under various circumstances as the incumbent of a particular role in a social system.
8. Role conflict--the contradictory or inconsistent institutional role expectations held by principals and unit teachers for the role of the unit leader in conducting unit functions.

9. Role effectiveness--a measure of the concordance of role behavior and role expectations.

Development of the Survey Instrument

The following considerations are essential in developing and validating a measurement of constructs: 1) the domain of interest must be outlined conceptually and the variables must be defined operationally, 2) the extent of interrelationships of the observables used in defining the constructs must be measured, and 3) the extent to which the constructs behave as expected or predicted by the theoretical base must be determined.[1]

Chapter I presented a conceptual outline of the domain of interest and operational definitions for the variables have been provided in Chapter II. As noted in Chapter I, unit leader performance effectiveness was theorized to be related to agreement on role expectations held for the unit leader as perceived by principals, unit leaders, and unit teachers. The researcher developed the Unit Leader Role Analysis (ULRA) instrument to operationalize and measure the constructs of role expectations and effectiveness.

This section provides a description of the procedures used in generating instrument items, the establishment of

[1] Jum Nunally, Psychometric Theory, New York: McGraw-Hill, 1967, p. 87.

instrument validity, the nature of the pilot study, the factor analysis, the establishment of instrument reliability, and a description of the survey instrument. Chapter III analyzes and examines the extent to which the constructs behave as expected or predicted by the theoretical base.

Development of Items

The discussion in Chapter I established the unit leader role as an evolving one with no universal combination of responsibilities attached to it. Development of the survey instrument, therefore, required a search for specific responsibilities frequently performed by the unit leader in conducting unit functions. The search included pertinent IGE/MUS-E literature and research with particular reliance being placed on information presented in the publication, Individually Guided Education in the Multiunit Elementary School.[2] Information and opinions also were sought from personnel in the R and D Center, professors and students in the Department of Educational Administration at the University of Wisconsin-Madison, and from principals, unit leaders, and teachers currently employed in MUS-E schools in Wisconsin. The experiential background of the researcher in working with IGE/MUS-E schools and observational skills

[2] Herbert J. Klausmeier, et al., Individually Guided Education and the Multiunit Elementary School, Guidelines for Implementation, Wisconsin Research and Development Center for Cognitive Learning, the University of Wisconsin, 1971.

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obtained in the behavioral sciences were another source employed in developing the original list of items.

One hundred and twelve potential questionnaire items were extracted from these data sources and were then analyzed and refined. Items were rejected when it was felt that they did not reflect responsibilities which were specifically performed by the unit leader, but were performed instead by the unit staff. Items which related to situations in specific school districts were deleted, as were items which were in the early literature of the R & D Center but were no longer recommended in the prototypic role. Items which duplicated a role or task already described by another item or items which were worded on a broader or narrower level than those specifically identified in the questionnaire also were eliminated. This analysis produced a list of seventy-nine role items which were considered to be representative of the domain of the unit leader role.

Instrument Validity

The validity of a research instrument indicates how effective the instrument is in measuring what it purports to measure. The American Educational Research Association Committee has established four main types of validity: content validity, predictive validity, concurrent validity, and construct validity. The procedures utilized to establish content validity for the ULRA will be discussed in this section. Factor analysis of the pilot data was the method

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utilized in establishing construct validity. Predictive and concurrent validity were not established for this instrument since it is not intended for use in selection procedures.

Content validity is "the representativeness or sampling adequacy of the content--the substance, the matter, the topics--of a measuring instrument."[3] "Content validation consists essentially of judgment . . ." and is guided by the question ". . .is the substance or content of this measure representative of the content or universe of content of the property being measured?"[4]

The content validity of the survey instrument utilized in this study was established by obtaining the opinions of experts at both the theoretical/research and practice levels of IGE/MUS-E. A ten-member jury was established which consisted of personnel from the R & D Center who are studying and implementing the concept of IGE/MUS-E, personnel from the Wisconsin Department of Public Instruction staff specifically assigned as consultants to multiunit schools, and professors in the Department of Educational Administration of the University of Wisconsin who have investigatory status for the organizaticnal component of the IGE/MUS-E model.

The 79 items developed as a result of the initial search and analysis were deemed an adequate and representative

[3]Fred N. Kerlinger, Foundations of Behavioral Research, New York: Holt, Rinehart and Winston, 1969, pp. 445-446.

[4]Ibid., p. 446.

sampling of items from the domain of the unit leader role. Each jury member was presented a list of the 79 items together with instructions for appraising each of the items. Specifically, each respondent was asked to place an O in front of any item which in his judgment was not descriptive of the unit leader role. Each respondent was further asked to place a check in front of those items which in his judgment were descriptive of the unit leader role but were not consistently or logically worded with the other items in the instrument. Finally, the respondents were asked to leave unmarked those items which were acceptable as stated.

The jury responses were analyzed and a decision rule was established which eliminated those items which more than one jury member indicated were outside the domain of the unit leader role. Items were also eliminated if three or more members indicated they were inconsistently worded. This analysis resulted in the elimination of 15 items leaving a total of 64 items to be utilized in the pilot study.

The Nature of the Pilot Study

A pilot study was undertaken to test general procedures for collecting data, to establish the clarity of instrument instructions, to determine the acceptability of individual items, and to provide data for establishing the construct validity and reliability of the research instrument. The pilot sample included 40 principals, 24 unit leaders and 46 unit teachers from MUS-E schools that had implemented the

IGE/MUS-E concepts prior to 1971. These individuals were chosen for the pilot because they were judged to be representative of the individuals selected for the final study. The respondents represented a wide variety of age, educational training, and experience.

The pilot study was open-ended inasmuch as the respondents were encouraged to suggest additional items for the instrument or to suggest revisions of existing items. No additional items were suggested and no items were revised as a result of the open-ended nature of the pilot study. The results of the pilot study were analyzed by factor analysis techniques to establish the dimensionality of the instrument.

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Factor Analysis

Factor analysis was the technique employed to study the relationships among the variables in the research instrument and to determine the number and nature of underlying constructs. "Factor analysis is a method for reducing a large number of measures to a smaller number of measures (factors) by discovering which measures 'go together' . . ."[5] The purpose of this analysis was to delineate new independent underlying factors which could be judged to be responsible for the groupings of items. This analysis was performed by program Bigfact, a fully supported statistical program

[5] Ibid., p. 453-454.

available at the Wisconsin Information Systems for Education.[6]

Program Bigfact was chosen because of its capability for factor analyzing large data matrices. The program provides R and Q Mode factor analysis for up to 200 variables. The program first produces an intercorrelation matrix for all variables involved, then uses this intercorrelation matrix to reduce the set of variables to the smallest set of new variables which are defined solely in terms of the original dimensions, and which retain the most important information contained in the original data.

Principal component analysis was employed to determine these common factors by extracting factors in the order, largest to smallest, of variance accounted for. The major solution feature of the principal components method is that it extracts a maximum amount of variance as each factor is calculated, thus producing a matrix which is expressed in the smallest number of factors.[7] "A principal components matrix and its loadings account for the common factor variances . . ., but they do not in general provide scientifically meaningful structures."[8] Therefore the matrix

[6] Dennis W. Spuck, Donald N. McIssac, Jr., and John A. Berg, Program Bigfact, The University of Wisconsin, Wisconsin Information Systems for Education, November, 1972.

[7] Kerlinger, op. cit., p. 661.

[8] Ibid., p. 667.

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obtained from the principal components solution was rotated using a varimax orthogonal method producing eight, seven, six and five factors respectively. An oblique projection was then produced from each solution.

Further analysis of the five-factor oblique projection produced four scales which were considered to be technically more pure than the five-factor solution presented by the analysis. The four factors established by this process were tentatively labeled: 1) instructional coordination, 2) organizational relationships, 3) unit renewal, and 4) management activities.

Establishment of these four scales necessitated the elimination of the five items which made up the fifth factor. This was accomplished by eliminating two items in this scale and incorporating the remaining three items that had been factored into the scale into one of the remaining four factors that had been established. The two items that were eliminated were judged to be alien to what the remaining factors were designed to measure. Those two items were:

> Orient unit teachers to school and district policies and procedures.
>
> Secure unit staff compliance with established school regulations.

Two of the items were incorporated into the factor dealing with organizational relationships:

> Attend all meetings of the IIC.

> Facilitate communication among central office personnel, consultants, and unit staff.

The remaining item was incorporated into the factor dealing with unit renewal:

> Keep abreast of advances in IGE through visits, conferences and meetings.

Finally, inspection of the R-mode oblique projection indicated that four additional items could be eliminated since they were judged to be tasks that were already identified in the instrument. The following items were eliminated on this judgmental basis:

> Assist in evaluating the achievement of schoolwide objectives.
>
> Develop rules and regulations for the day-to-day operation of the unit.
>
> Assist unit teachers with instructional activities, materials, and procedures when requested.
>
> Coordinate the initial and subsequent regrouping of students based on needs, interests, and attainment of objectives.

Q-Mode analysis was also formulated and factor analyzed on the separate correlations among measurements on subjects. This intercorrelation matrix produced a unidimensional measure which indicated that subjects did not differ significantly in grouping themselves as they responded to the items of the instrument. While some minor differences did exist, sufficient background data was not available to determine what caused these differences. Possibly it was a philosophical dimension.

Reliability

Concern for reliability comes from the neccssity to insure the dependability of the measuring instrument. Synonyms for reliability are: dependability, stability, consistency, and accuracy.[9] One measure of reliability is "the consistency with which a test yields the same results in measuring whatever it does measure."[10] Measurement variance can be systematic or random. Systematic variance leans in one direction. Random or error variance is self-compensating. Reliability is associated with random or error variance.[11]

The TSTAT computer program was used to establish the estimate of reliability based on internal consistency for the ULRA. Estimates of reliability were established based on the average correlation among items in the instrument. These estimates were utilized to determine the internal consistency of the instrument. The size of the reliability coefficient produced in this manner was based on the average correlation among items and the number of items.[12]

[9] Ibid., p. 429.

[10] H. H. Remmers, N. L. Gage, and Francis J. Rummerl, A Practical Introduction to Measurement and Evaluation, New York: Harper and Row, 1965, p. 125.

[11] Ibid., p. 430.

[12] Nunnally, op. cit., p. 210.

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TSTAT includes means, standard deviations, and alpha coefficients of internal consistency for each scale. It also includes means, standard deviations, correlations with scale, correlations with total, and choice distributions for each item.[13] Alpha coefficients of internal consistency for each scale and item correlations with their individual scales were considered important in establishing reliability for this instrument since the major source of measurement error is because of sampling of content.[14] The other measures in the TSTAT program were not considered relevant to this study.

The alpha coefficients for each of the scales of the ULRA and the total instrument alpha coefficient are presented in Table I.

[13] Dennis W. Spuck, Program TSTAT, The University of Wisconsin, Wisconsin Information Systems for Education, December 1971.

[14] Nunnally, op. cit., p. 211.

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TABLE I

COEFFICIENT ALPHAS FOR EACH DIMENSION AND FOR ALL ITEMS

Scale	Coefficient Alpha
Instructional Coordination	.8911
Organizational Relationships	.8057
Unit Renewal	.7725
Management Activities	.8050
TOTAL	.9353

Individual item correlations with their scale were analyzed and a decision rule was established that eliminated any items which failed to produce a .35 correlation with their appropriate scale. This analysis resulted in the elimination of two items:

> Prepare and distribute an agenda prior to unit meetings.
>
> Teach or be directly involved with children at least half time.

Other methods commonly utilized in improving instrument reliability including item revision aimed at improving clarity and insuring that instruments and instructions are easily understood and administered were also observed in the construction of the ULRA.[15]

[15] Ibid., pp. 222-223.

Following the complete analysis, 56 items remained which were factored into the four scales of the study instrument.

Instrument Description

The ULRA instrument developed for this investigation as a result of the previously described procedures consisted of three parts: a listing of task items, a global effectiveness measure, and a background data section. One basic questionnaire with modified forms for each respondent group was developed. (See Appendices B and C.) Respondents included principals, unit leaders, and unit teachers thus necessitating three modifications of the basic questionnaire.

The first section of the instrument consisted of the 56 task statements which were determined to consist of four scales and were intended to be descriptive of tasks the unit leader performs in conducting unit functions. Each respondent reacted to these tasks according to two frames of reference. The first frame of reference requested the respondents to indicate the expectations they held for the unit leader role. The five possible responses were: Absolutely Must, Probably Should, May or May Not, Probably Should Not, and Absolutely Must Not. Responses were valued on a scale of 5, 4, 3, 2, 1, with 5 points being assigned to "Absolutely Must" and 1 point for "Absolutely Must Not."

The second frame of reference involved requesting the respondent to rate the performance effectiveness of the unit leader in performing the identified tasks. The five possible responses for this dimension of the instrument were: Very Effective, Effective, Neither Effective Nor Ineffective, Ineffective, and Very Ineffective. These responses were also valued on a five-point scale with 5 points being assigned "Very Effective" and 1 point being assigned "Very Ineffective." Each task description on the expectation scale for the unit leader was prefaced with the prompt "As unit leader I am expected to . . ." and on the effectiveness scale the prompt was "I rate my effectiveness in performing this task as . . ." Expectation ratings for principals and unit teachers were prefaced with the following prompt: "I expect the unit leader to . . ." and performance effectiveness ratings were prefaced with "I rate the unit leader's effectiveness in performing this task as . . . ."

The twenty items in the pilot instrument listing those activities which the unit leader performs that are directly related to the instructional program, are presented in Table II. The items in this scale were labeled instructional coordination.

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TABLE II

INSTRUCTIONAL COORDINATION TASKS

Item Number	Item
15	Coordinate the use of specialized volunteer community personnel to assist in instruction.
44	Direct the maintenance of systematic instructional record keeping for monitoring student progress.
12	Recommend the curricular areas to be incorporated into the IGE model within the unit.
17	Encourage parents to attend unit meetings or observe in the school.
52	Hold the unit staff accountable for student achievement.
54	Coordinate the activities of special teachers in the unit.
7	Meet informally with parents to discuss the unit's instructional program.
26	Coordinate the placement and supervision of student teachers or interns in the unit.
19	Assist in collecting, evaluating, and interpreting data needed for instructional improvement.
28	Establish workloads that utilize the special interests and abilities of all unit staff.
31	Participate in the formulation of policies for implementing instructional improvement in the schoolwide IGE program.
42	Make certain that each child is engaged in appropriate one-to-one, small group, class size or large group activities.

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TABLE II, Continued

INSTRUCTIONAL COORDINATION TASKS

Item Number	Item
39	Direct unit staff in selecting or preparing written behavioral objectives for each curricular area.
11	Coordinate the assessment of children's characteristics prior to grouping.
8	Coordinate the assessment of students in the unit based on individual objectives.
56	Direct unit staff in writing or selecting instructional objectives for each student.
29	Establish with unit staff daily time schedules for instructional activities.
14	Provide for the utilization of consultants and resource personnel.
16	Schedule the use of special school facilities, equipment and materials needed by the unit.
43	Participate in establishing a system of reporting that involves teacher, parent and child.

The eleven items in the pilot instrument which describe the unit leader's efforts in providing structure or channels for establishing and maintaining relationships within the school that involve the unit staff or program are presented in Table III. The tasks comprising this scale were tentatively labeled organizational relationships.

TABLE III

ORGANIZATIONAL RELATIONSHIPS

Item Number	Item
10	Schedule unit meetings for goal setting, problem solving and evaluation.
37	Facilitate formal communication between the unit and the IIC.
2	Attend all meetings of the IIC.
40	Seek the advice and counsel of the principal in handling special unit problems.
21	Facilitate communication among central office personnel, consultants, and unit staff.
13	Cooperate with IIC members in coordinating schoolwide facilities and resources.
27	Provide information to other units regarding promising practices.
5	Channel information from a variety of sources to unit teachers.
41	Facilitate formal communication between the unit staff and the principal.
18	Facilitate effective interaction between and among members of the unit.
3	Schedule and chair unit meetings.

The eleven items of the pilot instrument which are representative of unit leader efforts to expose the unit staff to new ideas and/or procedures as well as efforts aimed at improving existing methods or practices are listed in Table IV. This scale was labeled unit renewal.

TABLE IV

UNIT RENEWAL

Item Number	Item
33	Take initiative in maintaining unit staff morale at a high level.
50	Coordinate research activities within the unit.
23	Provide for appropriate briefing of observers to the unit.
25	Provide unit staff with information regarding advances in subject matter and promising instructional materials.
9	Plan with appropriate personnel the research activities for the unit.
46	Keep abreast of advances in IGE through visits, conferences and meetings.
20	Confer informally with unit staff members to discuss ways of improving instruction.
49	Observe on request the instructional presentations of unit staff and provide feedback aimed at improving instruction.
6	Conduct demonstration lessons for unit staff members using new materials and procedures.
38	Take the initiative in developing new instructional procedures within the unit.
30	Alter unit plans and procedures when evaluation indicates such a need.

Tasks describing management activities which the unit leader performs make up the scale of the pilot instrument which was named management activities. These are mainly tasks which would normally be the responsibility of the building principal in an elementary school organized on a self-contained classroom basis. Items in this scale deal specifically with staff development, budgeting, reporting, staff personnel, and pupil personnel services. The fourteen tasks included in the management activities scale are presented in Table V.

TABLE V

MANAGEMENT ACTIVITIES

Item Number	ITEM
51	Provide individual assistance to new and beginning unit teachers.
53	Assist unit teachers in the assessment and modification of student behavior patterns.
34	Conduct inservice activities for para-professionals assigned to the unit.
45	Assume responsibility for completing routine reports.
55	Participate in developing the building plan for interns or student teachers.
1	Evaluate para-professionals assigned to the unit.
4	Resolve interpersonal conflicts within the unit.
47	Coordinate the utilization of para-professionals assigned to the unit.
32	Organize unit staff so that each member is engaged in appropriate planning, management and instructional activities.

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TABLE V, Continued

MANAGEMENT ACTIVITIES

Item Number	Item
24	Coordinate the development of the instructional budget for the unit.
36	Recommend special resources and personnel needed to accomplish the unit's instructional task.
48	Participate in developing the school's inservice teacher education program.
22	Participate in the selection of professional staff assigned to the unit.
35	Participate in the selection of nonprofessional staff assigned to the unit.

The second section of the instrument was designed to obtain a measure of the global effectiveness of the unit leader in conducting unit functions. This section consisted of a single item with five possible responses. Respondents were asked to rate the overall effectiveness of the unit leader in conducting unit functions.

The third section of the instrument was designed to gather background data concerning each of the respondent groups. This section of the instrument included questions about the sex, professional training, years of experience, number of teachers in the unit, number of paraprofessional staff assigned to the unit, number of students assigned to the unit, exposure of respondents to multiunit concepts,

unit leader salary differentials, and amount of released time provided unit leaders.

Since the third section of the instrument dealt with background facts it was accepted as having face validity. The selected items or questions in this section were included on the basis of their descriptive and presumed correlative value to the study. Responses to these personal and situational questions in the pilot study provided additional proof that this part of the instrument was unambiguous and did extract the information sought.

Study Population and Sample

The population of multiunit elementary schools from which the study sample was drawn was composed of 52 Wisconsin elementary schools that had implemented the multiunit mode in the fall of 1971. This implementation date was selected since all schools implementing IGE/MUS-E at that time were exposed to a common set of inservice materials. This date also was selected because it permitted the study to be conducted in schools which uniformly had 1 1/2 years to resolve most of the difficulties encountered when the school's operations were restructured. Additional selection criteria imposed were: 1) inclusion only of those schools which had adopted IGE on a schoolwide basis with the exception of kindergarten and special education students, 2) inclusion only of those schools in which the principal had occupied his position since the inception of IGE/MUS-E, and 3) inclusion

only of those units in which the unit leader had been in that position since the implementation of IGE.

The names and addresses of the schools which conformed to these criteria were obtained from the 1971-72 IGE Multi-Unit Elementary Schools Directory.[16] Personnel from the Department of Public Instruction working with MUS-E schools and personnel from the R & D Center checked the list of 52 schools obtained from the Directory to insure that they had signed a PACT Agreement[17] and were implementing all components of the IGE model. These schools were then considered validated IGE/MUS-E schools.

The principals of each of the 52 validated schools were sent an introductory letter explaining the nature of the study and asking them to indicate by return postcard if their school was willing to participate in the study. A total of 42 schools responded that they would participate. Two schools indicated that they would participate contingent upon approval from the central office, four schools indicated that they were not willing to participate, and four schools failed to respond.

[16] 1971-72 Directory of IGE/MULTIUNIT ELEMENTARY SCHOOLS, Madison, Wisconsin: Wisconsin Research and Development Center for Cognitive Learning, 1971.

[17] PACT (Participate to Activate Change Today), an agreement between local school districts and the Department of Public Instruction, State of Wisconsin.

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The two schools requiring central office clearance were in Milwaukee. They were eliminated from the study population since Milwaukee, as a city of the first class with its own school laws, was judged to be too complex for comparison with other districts in Wisconsin. The four schools that had failed to respond were contacted by telephone and agreed at that time to participate. The four schools that indicated they were not willing to participate were also contacted by telephone and agreed to participate following a conversation in which further specifics regarding the study were presented.

Contacts with each of the individual schools revealed that two of the population schools contained only one unit in which the unit leader also acted as the principal of the school. Since the design of the study necessitated having both a unit leader and the principal respond, these two schools were eliminated from further consideration. These procedures produced a final study sample of 48 schools.

The principal of each of the 48 final study sample schools in addition to one randomly selected unit leader and two randomly selected unit teachers were then contacted by phone and their willingness to participate in the study was confirmed. A computer program, Program IRANDEX, was used to select the random sample of unit leaders and teachers.[18]

[18] Dennis W. Spuck, Donald N. McIsaac, Jr., Program IRANDEX, Wisconsin Information Systems for Education, Revision 3, September 12, 1972.

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Data Collection Procedures

A packet of instruments was mailed to the principal of each of the schools which included the individual instruments, letters of instruction, and return self-addressed envelopes for each respondent. Each instrument was letter coded by school and enclosed in a separate envelope for return mailing to insure anonymity of response. One hundred and ninety-two instruments were mailed, including 48 for principals, 48 for unit leaders and 96 for unit teachers.

A cover letter was developed to accompany each instrument. It provided an explanation of the need for and intent of the study. Each cover letter was personally addressed and signed by this researcher and his major professor.

A 60 percent return had been obtained by two weeks after the initial mailing. At that time, letters were sent to building principals in schools where responses from any of the participants were lagging. The principals were asked to contact either the unit leader or teachers involved in the study and to elicit their cooperation. One month after the initial mailing, principals of those schools from which responses had not yet been received were contacted by telephone and their cooperation was solicited in obtaining the necessary information from nonrespondents. The principals responded positively as evidenced by the high rate of return. Additional instruments were mailed to principals, unit

leaders or teachers, as required. Numerous other telephone calls and personal contacts were made over a three month period to obtain lagging responses.

The percentage of return rate was exceptionally high. The overall percentage return rate was 99 percent which is extremely high for a survey type of research. Specifically, 48 of 48 principals (100%), responded; 47 of 48 unit leaders (98%), responded; and 95 of 96 unit teachers (99%), responded.

Data Treatment

The target study data were factor analyzed by both R and Q mode utilizing Program Bigfact[19] in order to determine if the four scales of the instrument established by analysis of the pilot data were, in fact, valid. The reliability of the instrument was again checked using Program TSTAT.[20] The scale scores were then averaged and the data were analyzed on the basis of mean scale scores.

The hypotheses formulated for investigation in this study necessitated two distinct types of statistical analysis. The first three hypotheses pertained to differences in role expectations while hypotheses four, five and six were concerned with relationships between the congruence of role expectations and performance effectiveness.

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[19] Spuck, McIssac, and Berg, Program Bigfact, op. cit.

[20] Spuck, Program TSTAT, op. cit.

Finally, the ancillary questions were concerned with relationships between selected organizational variables and agreement on role expectations. It was imperative that statistical procedures were selected which were appropriate for analyzing the various categories of hypotheses and questions.

The congruence of role expectations were analyzed for each of the four scales of the ULRA using all possible combinations of groups. In order to give equal weight to each teacher included in the study, a mean response was computed and used in each analysis involving teachers. Mean scale scores were also used because the number of items in each scale varied.

PROGRAM STATJO3: ONE WAY 1,[21] was the statistical program used to test the extent of difference among groups. The same program provided t-tests on an independent group comparison basis for all possible groups. The t-values produced in this manner determined where differences existed between the respondent groups in their expectations for the role of the unit leader. An .05 level of significance was established for all tests.

Hypotheses four, five, and six sought to determine what relationship existed between respondent group differences in expectations and their ratings of unit leader effectiveness in performing the identified role.

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[21] PROGRAM STATJOB: ONE WAY 1, The University of Wisconsin-Madison, Academic Computing Center, 1972.

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This analysis was also conducted on each of the four scales of the ULRA. Each scale score was also correlated with an overall effectiveness score. Analyses were conducted using both signed differences and absolute differences in expectations. Mean response scores for teachers and scales were again employed.

PROGRAM STATJOB:DSTAT2,[22] a descriptive statistic computer program prepared by the Academic Computing Center, The University of Wisconsin-Madison, examined the strength of the correlation between the two variables in each of the hypotheses. A two-tailed test with significance of r at the .05 level was established for each correlation.

Correlation was the statistical technique used to analyze the ancillary questions. Pearson product-moment correlation coefficients were obtained by utilizing the DSTAT2 PROGRAM to establish the degree of relationships existing between the selected organizational variables and agreement on expectations. The Pearson product-moment method was chosen since it considers actual scores in computation and is usually more suitable for continuous data. Point biserial correlations were used to test the relationship between exposure to IGE concepts and agreement on expectations. A two-tailed test with a significance level of .05 was again employed.

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[22] PROGRAM STATJOB:DSTAT2, The University of Wisconsin-Madison, Academic Computing Center, 1972.

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Summary

This chapter presented the design and methodology of the study. It was explained that the purpose of the study was to examine the perceived role expectations held for unit leaders and to relate agreement on expectations to performance effectiveness. Six hypotheses were presented together with six ancillary questions, and definitions were provided for the major concepts involved in the study.

The procedures utilized in developing the survey instrument were explained, as were the tests of validity and reliability. Data collected from principals, unit leaders, and teachers in ten Wisconsin schools served as the pilot data for factor analyzing the questionnaire items into four scales. Program TSTAT was used to test for internal consistency of the instrument. The study population was outlined and the sample from which the study data were collected was delineated. Finally, data treatment techniques employed in the study were explained. The chapter to follow presents the analysis of the data.

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CHAPTER III

ANALYSIS OF THE DATA

This chapter includes an analysis of the data reported in five sections: 1) a demographic profile of respondents, 2) validity and reliability of the instrument, 3) tests of hypotheses, 4) examination of ancillary questions, and 5) a chapter summary.

Demographic Profile of Respondents

The population utilized in this study included the fifty-two Wisconsin elementary schools that had implemented the multiunit mode in the fall of 1971. Two schools from Milwaukee were eliminated from the population since they were not considered comparable to the other schools, two schools were eliminated because one person served both as principal and unit leader, and two schools failed to provide sufficient data for analysis; thereby leaving forty-six schools from which complete data were obtained.

The sample from each school included the principal, one unit leader and two teachers who were randomly selected. The general information furnished by these groups in responding to the questionnaire, and data obtained by the researcher from the Department of Public Instruction, was analyzed to provide the demographic profile reported in this section.

Table VI presents a distribution of the school districts which participated in the study according to the number of professional staff members the district employed. Fifty percent of the participating districts had fewer than 200 professional staff members, a fact which indicates that MUS-E is being adopted by both large and small districts. While only five districts employed a professional staff of over 600 members, those five districts furnished nine of the schools in the study.

TABLE VI

DISTRIBUTION OF SCHOOL DISTRICTS ACCORDING TO NUMBER OF PROFESSIONAL STAFF

Professional Staff	Frequency	%
Less than 100	9	28.1
100 - 199	7	21.9
200 - 299	3	9.4
300 - 399	3	9.4
400 - 499	3	9.4
500 - 599	2	6.2
over 600	5	15.6
TOTAL	32	100.0

The distribution of respondents by sex is presented in Table VII. The responses are categorized by referent group and total response. Almost 90 percent of the principals were male, and over 90 percent of the unit leaders and teachers were female. Females accounted for over 70 percent of the total respondents.

TABLE VII

SEX OF RESPONDENTS, CATEGORIZED BY GROUP, FREQUENCY, PERCENTAGE AND TOTAL

Respondent Group	Male		Female		Total Group Respondents
	f	%	f	%	
Principals	41	89.1	5	10.9	46
Unit Leaders	4	8.7	42	91.3	46
Unit Teachers	6	6.5	86	93.5	92
TOTALS	51	27.7	133	72.3	184

Table VIII presents the professional training level of the respondents. It was found that: 1) none of the principals and only 1 percent of the teachers and unit leaders combined has less than a B.A., 2) 50 percent of the respondents had obtained at least fifteen credits beyond the B.A., 3) approximately 4 percent of the unit leaders and 4 percent of the unit teachers had obtained master's degrees (although none had earned a significant number of credits beyond the master's), and 4) approximately 45 percent of the principals had earned at least sixteen credits beyond the master's degree.

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TABLE VIII

PROFESSIONAL TRAINING LEVEL OF RESPONDENTS

Training Level	Principals		Unit Leaders		Unit Teachers		Total All Groups
	f	%	f	%	f	%	
Less than B.A.	0	0	1	.5	1	.5	2
B.A.	0	0	24	13.1	66	35.9	90
B.A. + 15	7	3.8	14	7.6	18	9.8	39
M.A.	20	10.9	7	3.8	7	3.8	34
M.A. + 16	15	8.2	0	0	0	0	15
M.A. + 30	3	1.6	0	0	0	0	3
Ph.D.	1	.5	0	0	0	0	1
TOTAL	46	25.0	46	25.0	92	50.0	184

Table IX presents the number of years in teaching/administration of the respondents. The frequency and percentage of teaching/administrative years experience are reported and categorized by referent group and total. All respondents counted the current year as a year of experience. As expected, the referent group with the greatest number of years of total experience was the principals. Conversely, the unit teachers manifested the least number of years of total experience.

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TABLE IX

NUMBER OF YEARS OF TEACHING/ADMINISTRATION EXPERIENCE

Years of Experience	Principals		Unit Leaders		Unit Teachers		Total All Groups
	f	%	f	%	f	%	
1- 5	10	5.4	7	3.8	31	16.9	48
6-10	14	7.6	13	7.1	28	15.2	55
11-15	8	4.3	4	2.2	11	5.9	23
16-20	2	1.1	8	4.3	6	3.3	16
21-25	6	3.3	5	2.8	3	1.6	14
26-30	4	2.2	8	4.3	6	3.3	18
over 30	2	1.1	1	.5	7	3.8	10
TOTALS	46	25.0	46	25.0	92	50.0	184

Table X presents the distribution of the units in the study sample according to the number of professional staff members, para-professionals, and students assigned to each unit. The mean number of professional staff members was 4.2, the mean for para-professionals was .5, and the mean number of students was 105.7. (Interns assigned to units were listed as professional staff members in this table; however, no interns were included in the study sample and only five interns were assigned to the units included in the sample.) The overall pupil/teacher ratio for all units was computed as 24.1/1 when full-time teachers were assigned a weighting of 1.0; full-time interns, .50; and full-time para-professionals, .25.

TABLE X

DISTRIBUTION OF UNITS ACCORDING TO NUMBER OF STAFF AND STUDENTS

Prof. Staff	f	%	Para-Prof. Staff	f	%	Number of Students	f	%
1	0	0	0	11	23.9	Less than 75	3	6.5
2	0	0	.5	12	26.2	75-84	4	8.7
3	9	19.6	1.0	15	32.6	85-94	7	15.3
4	15	32.6	1.5	2	4.3	95-104	8	17.4
5	15	32.6	2.0	4	8.7	105-114	5	10.8
6	4	8.7	2.5	0	0	115-124	4	8.7
7 or more	3	6.5	3.0	2	4.3	125 or more	15	32.6
TOTAL	46	100.0	TOTAL	46	100.0	TOTAL	46	100.0
Mean -4.2			Mean -.5			Mean -105.7		

In Table XI data are presented concerning exposure of each of the respondent groups to various types of inservice training regarding IGE. Over 37 percent of the respondents were not exposed to a building orientation prior to the implementation of IGE, despite the fact that the district had signed a PACT agreement in which they committed themselves to provide such an inservice exposure. (This fact can be partially explained by staff turnover.) Increasingly, people are taking college courses in IGE-related concepts, as demonstrated by the 35 percent responding positively to that item.

TABLE XI

INSERVICE TRAINING EXPOSURE OF RESPONDENTS TO I.G.E. CONCEPTS

Type of Training	Principal		Unit Leaders		Unit Teachers		Totals	
	Yes	No	Yes	No	Yes	No	Yes	No
Bldg. Staff Orientation	30	16	30	16	55	37	115	69
College Course	16	30	20	26	29	63	65	119
Center Sponsored Programs	22	24	17	29	39	53	78	106
Principal-Unit Leader Workshop	37	9	24	22	-	-	61	31
Experienced Personnel Workshop	32	14	27	19	26	66	85	99

Validity and Reliability of the Instrument

The primary purpose of the pilot study was to establish the construct validity and reliability of the instrument. The procedures utilized in establishing validity and reliability, together with the changes that were made in the instrument prior to collection of the target data, were reported in Chapter II. After the target data were collected, and prior to analysis, the revised instrument was again checked for construct validity and reliability. Data collected from the 184 respondents were subjected to two computer programs: 1) Program BIGFACT[1] and 2) Program MSTAT.[2]

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Validity

Factor analysis was used to establish construct validity for the ULRA. Program BIGFACT computed means, standard deviation, skew and kurtosis for each variable relevant to the study. It also computed a correlation matrix, an unrotated factor matrix, an orthogonally rotated factor matrix, and a reordered oblique projection. Both the orthogonally rotated matrix and the oblique projection were examined in establishing the construct validity of the instrument.

Examination of the results of the principal components solution revealed that the constructs identified in the pilot had only partially repeated. This had not been unexpected since constructs developed from a pilot sample may not recur. The constructs thus established had only conditionally been accepted. Further, the instrument had been altered by the elimination of several items prior to the collection of the target data, and the pilot sample was relatively small when judged by the number of items in the instrument.

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[1]Dennis W. Spuck, Donald N. McIssac, Jr., and John A. Berg, Program BIGFACT, the University of Wisconsin, Wisconsin Information Systems for Education, November, 1972.

[2]Dennis W. Spuck, Program MSTAT, University of Wisconsin, Wisconsin Information Systems for Education, December, 1971.

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Because the factor analysis of the target data failed to produce the same constructs as did the pilot data, it was decided to conduct a factor analysis on the combined data. The combined data were subjected to Program BIGFACT to extract a five and a four-factor solution based on a correlation matrix when the separate correlations are between variables (R-Mode). The matrix extracted by principal-component analysis was submitted to a varimax orthogonal rotation and an oblique projection was produced to identify distinct clusters of variables.

The four-factor solution produced from the combined data was, following examination, determined to be more factorially pure than the five-factor solution and was determined to be more similar to the pilot results. The item loadings from the orthogonally rotated principal factor matrix are presented by factor in Table XII. The reordered oblique projection loadings for the fifty-six items are presented by factor in Table XIII.

This analysis suggested that four relatively stable factors were present. Items and loadings on three of these factors generally paralleled the results obtained in the pilot study. Thus the constructs of organizational relationships, management activities, and instructional coordination were considered validated.

The construct relating to unit renewal activities that had been identified in the pilot study kept a group of

TABLE XII

ROTATED FACTOR MATRIX

ITEM	LOADING	ITEM	LOADING
2	.682	6	.276*
3	.416	8	.396*
4	.399*	11	.536
5	.465	12	.312*
10	.608	30	.341*
13	.415	38	.580
18	.606	39	.538
19	.571	42	.619
27	.358*	43	.490
29	.71	44	.603
32	.562	53	.529
33	.582	54	.452
37	.729	56	.597
40	.559		
41	.361*		
47	.496		
51	.672	7	.467
		9	.409
		14	.566
		15	.429
1	.582	16	.552
20	.436	17	.565
22	.625	21	.481
23	.432	25	.405
34	.427	31	.605
26	.683	45	.344*
28	.405	46	.583
34	.428		
35	.579		
36	.466		
48	.561		
49	.470		
50	.400		
52	.365*		
55	.420		

*Factor Loading .400

TABLE XIII

REORDERED OBLIQUE PROJECTION LOADINGS OVER FOUR FACTORS AND FIFTY-SIX ITEMS

Reordered Item No.	Factor Loading	Reordered Item No.	Factor Loading
37	1.000	42	1.000
2	.961	44	.969
29	.885	56	.899
19	.839	53	.838
13	.817	43	.814
51	.816	39	.777
10	.739	11	.771
18	.701	38	.590
33	.676	8	.530
4	.604	54	.478
32	.602	30	.478
40	.594	12	.401
5	.582	6	.346*
47	.477		
3	.470		
27	.463	26	1.000
41	.432	22	.931
		1	.917
		35	.869
		48	.755
17	1.000	49	.703
16	.980	34	.634
15	.965	20	.607
14	.828	36	.603
7	.745	24	.571
31	.676	28	.551
21	.660	55	.537
46	.633	23	.498
25	.515	52	.479
9	.502	50	.472
45	.474		

*Factor Loading .400

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items intact and added several new items. The common element of this new clustering indicated that the items related to unit leader relationships with personnel outside the school. It was therefore reasonable to label this factor as extra-organizational relationships. The organizational relationship factor was then relabeled intra-organizational relationships.

It was considered desirable to have rotated matrix and oblique projection loadings of .400 for placement of individual items into factors; however, as manifested by Table XII, nine items failed to meet this criterion. These items were considered useful and necessary for the study since they were tasks not included in the prototypic role and were, therefore, included in the analysis. Further, in analyzing the commonality estimates of these items, it was also apparent that while many of the items had low loadings on a particular factorial scale, they were contributing only to one factor. Only one item did not meet the .400 criterion when a reordered oblique projection was produced from the orthogonally rotated matrix. Finally, some of the items were placed in scales other than the one they originally factored to on the basis that their variance was spread among two or more scales and a judgmental analysis called for placing them in a new scale.

As a result of these factor analytic data, it was concluded that the tasks related to the unit leader role consisted of four scales; intra-organizational relationships,

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extra-organizational relationships, instructional coordination and management activities. Therefore, the study hypotheses were analyzed on the basis of these four scales. Tables XIV, XV, XVI, and XVII present the fifty-six task items and the scale to which each item was assigned.

The seventeen items describing the unit leader's efforts to provide structure or channels for establishing and maintaining relationships within the school that involve the unit staff or program are presented in Table XIV. Since these tasks deal with relationships with personnel within the school, this factor was labeled as intra-organizational relationships.

TABLE XIV

INTRA-ORGANIZATIONAL RELATIONSHIPS

Item Number	Item
2	Attend all meetings of the IIC.
3	Schedule and chair unit meetings.
4	Resolve interpersonal conflicts within the unit.
5	Channel information from a variety of sources to unit teachers.
10	Schedule unit meetings for goal setting, problem solving, and evaluation.
13	Cooperate with IIC members in coordinating school-wide facilities and resources.

TABLE XIV Continued

INTRA-ORGANIZATIONAL RELATIONSHIPS

Item Number	Item
18	Facilitate effective interaction between and among members of the unit.
19	Assist in collecting, evaluating, and interpreting data needed for instructional improvement.
27	Provide information to other units regarding promising practices.
29	Establish with unit staff daily time schedules for instructional activities.
32	Organize unit staff so that each member is engaged in appropriate planning, management and instructional activities.
33	Take initiative in maintaining unit staff morale at a high level.
37	Facilitate formal communication between the unit and the IIC.
40	Seek the advice and counsel of the principal in handling special unit problems.
41	Facilitate formal communication between the unit staff and the principal.
47	Coordinate the utilization of para-professionals assigned to the unit.
51	Provide individual assistance to new and beginning unit teachers.

Table XV presents those items which outline tasks the unit leader performs in relating to personnel outside the

school. Accordingly, the eleven items which factored into this scale were termed extra-organizational relationships. Many of the items in this scale were factored into the scale dealing with unit renewal following the pilot study. Interactions between the unit leader and personnel outside the unit's building but within the school district factored into this scale together with interactions between the unit leader and community personnel.

TABLE XV

EXTRA-ORGANIZATIONAL RELATIONSHIPS

Item Number	Item
7	Meet informally with parents to discuss the unit's instructional program.
9	Plan with appropriate personnel the research activities for the unit.
14	Provide for the utilization of consultants and resource personnel.
15	Coordinate the use of specialized volunteer community personnel to assist in instruction.
16	Schedule the use of special district facilities, equipment and materials needed by the unit.
17	Encourage parents to attend unit meetings or observe in the school.
21	Facilitate communication between central office personnel, consultants, and unit staff.

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TABLE XV Continued

EXTRA-ORGANIZATIONAL RELATIONSHIPS

Item Number	Item
25	Provide unit staff with information regarding advances in subject matter and promising instructional materials.
31	Participate in the formulation of policies for implementing instructional improvement in the district-wide IGE program.
45	Assume responsibility for completing routine reports.
46	Keep abreast of advances in IGE through visits, conferences, and meetings.

The thirteen items which relate to those activities which the unit leader performs that are directly related to the instructional program are presented in Table XVI. This factor was labeled instructional coordination. Tasks related to management of the instructional program are also factored into this scale.

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TABLE XVI

INSTRUCTIONAL COORDINATION

Item Number	Item
6	Conduct demonstration lessons for unit staff members using new materials and procedures.
8	Coordinate the assessment of students in the unit based on individual objectives.
11	Coordinate the assessment of children's characteristics prior to initial grouping.
12	Recommend the curricular areas to be incorporated into the IGE model within the unit.
30	Alter unit plans and procedures when evaluation indicates such a need.
38	Take the initiative in developing new instructional procedures within the unit.
39	Direct unit staff in selecting or preparing written behavioral objectives for each curricular area.
42	Make certain that each child is engaged in appropriate one-to-one, small group, class size or large group activities.
43	Participate in establishing a system of reporting that involves teacher, parent and child.
44	Direct the maintenance of systematic instructional record keeping for monitoring student progress.
53	Assist unit teachers in the assessment and modification of student behavior patterns.

TABLE XVI Continued

INSTRUCTIONAL COORDINATION

Item Number	Item
54	Coordinate the activities of special teachers in the unit.
56	Direct unit staff in writing or selecting instructional objectives for each student.

Tasks describing management activities which the unit leader performs are included in Table XVII. These are tasks which would normally be the responsibility of the building principal in an elementary school organized on a self-contained classroom basis. Items in this factor deal specifically with budgeting, reporting, staff personnel, and pupil personnel services. The fifteen tasks included in this factor were termed management activities.

TABLE XVII

MANAGEMENT ACTIVITIES

Item Number	Item
1	Evaluate paraprofessionals assigned to the unit.
20	Confer informally with unit staff members to discuss ways of improving instruction.

TABLE XVII Continued

MANAGEMENT ACTIVITIES

Item Number	Item
22	Participate in the selection of professional staff assigned to the unit.
23	Provide for appropriate briefing of observers to the unit.
24	Coordinate the development of the instructional budget for the unit.
26	Coordinate the placement and supervision of student teachers or interns in the unit.
28	Establish workloads that utilize the special interests and abilities of all unit staff.
34	Conduct inservice activities for para-professionals assigned to the unit.
35	Participate in the selection of nonprofessional staff assigned to the unit.
36	Recommend special resources and personnel needed to accomplish the unit's instructional task.
48	Participate in developing the school's inservice teacher education program.
49	Observe on request the instructional presentations of unit staff and provide feedback aimed at improving instruction.
50	Coordinate research activities within the unit.
52	Hold the unit staff accountable for student achievement.
55	Participate in developing the building plan for interns or student teachers.

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Reliability

Program TSTAT[3] was again used to estimate reliability based on the alpha coefficient of internal consistency for the fifty-six items and four scales of the ULRA as established by Program BIGFACT. In describing Program TSTAT Spuck wrote:

> Program TSTAT provides a variety of item and scale analysis for forced-choice and right wrong answer scales. Included in the program out-put are means, standard deviations, and alpha-coefficients of internal consistency for each scale; and means, standard deviations, correlations with scale, correlation with total, and choice distributions for each item.[4]

It was considered important to examine alpha-coefficients of internal consistency for each scale, item correlations with scale, and item correlations with total for the purpose of this study. Spuck has indicated that alpha-coefficients below .50 are of questionable reliability, those between .50 and .70 have sufficient reliability for the early stages of research, and those above .70 have a high degree of reliability.[5] A review of several studies in which TSTAT was used and a discussion with committee advisors indicated that a correlation of [illegible] was desirable for individual item

[3] Spuck, Program TSTAT, op. cit.

[4] Ibid.

[5] Dennis W. Spuck, Technical Report: Item Analysis and Reliability Assessment of School Sentiment Index, Madison, Wisconsin, The University of Wisconsin, 1971.

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correlations to total and .40 for items to scale. The following criteria were established as desirable based on this information:

1. an alpha-coefficient for each scale $\geq .70$
2. a correlation of the item with total score $\geq .35$
3. a correlation of the item with scale score $\geq .40$

An alpha-coefficient represents the correlation expected from one test item with all other test items in the same domain. Empirically, the alpha-coefficient is considered a coefficient of item homogeneity in terms of items measuring the same construct. All alpha-coefficients for each of the scales in the ULRA and the total instrument exceeded the criteria established by Spuck for highly reliable instruments. These data are presented in Table XVIII.

TABLE XVIII

COEFFICIENT ALPHAS FOR EACH DIMENSION AND FOR ALL ITEMS

Scale	Coefficient Alpha
Intra-Organizational Relationships	.8709
Extra-Organizational Relationships	.7149
Instructional Coordination	.8163
Management Activities	.8370
TOTAL	.9259

Examination of the correlations of item to total revealed that four items did not meet the criterion of .35. Despite low correlations these items were retained since, in the opinion of the researcher, they were important to the study. Two items failed to meet the criterion of .40 correlation with scale, however these items were also retained because of their importance to the study.

These low correlations were not unexpected since the criterion of .35 and .40 were stringent when considering that items had already been factored into scales. Further, the data on which the correlations were computed were skewed, a fact which generally attenuates correlations. The item number, scale, correlation of the item with the total, and correlation of the item with the scale for each of the fifty-six items in the ULRA as produced by TSTAT are shown in Table XIX.

TABLE XIX

ANALYSIS OF THE ULRA BY PROGRAM TSTAT FOR INDIVIDUAL ITEMS OVER FOUR SCALES

Item No.	Scale	Correlation (total)	Correlation (scale)
1	4	.2866*	.5396
2	1	.4075	.6488
3	1	.3351*	.4192
4	1	.3910	.4464
5	1	.3743	.5212
6	3	.3829	.4574
7	2	.3736	.4890
8	3	.4705	.5486
9	2	.4170	.4617
10	1	.4505	.6109
11	3	.3072*	.4965
12	3	.4297	.4820
13	1	.4209	.4912
14	2	.3629	.5140
15	2	.3917	.5250
16	2	.4896	.6492
17	2	.3680	.5247
18	1	.5057	.6554
19	1	.4430	.5818
20	4	.4024	.3938**
21	2	.3325*	.4266
22	4	.3908	.6001
23	4	.4410	.3953**
24	4	.4930	.5670
25	2	.4251	.5118
26	4	.5043	.6548
27	1	.4155	.4431
28	4	.5541	.4969
29	1	.4229	.6684
30	3	.4966	.5018
31	2	.5038	.5183
32	1	.5113	.5869
33	1	.4435	.6092
34	4	.4795	.5777
35	4	.3614	.5321
36	4	.5354	.5563
37	1	.3875	.6851
38	3	.5228	.5529
39	3	.5135	.6200
40	1	.4315	.5867
41	1	.5526	.4089
42	3	.4994	.6411
43	3	.4973	.5653

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TABLE XIX Continued

ANALYSIS OF THE ULRA BY PROGRAM TSTAT FOR INDIVIDUAL ITEMS OVER FOUR SCALES

Item No.	Scale	Correlation (total)	Correlation (scale)
44	3	.4971	.6137
45	2	.4228	.4844
46	2	.4933	.4991
47	1	.5560	.5856
48	4	.5086	.6288
49	4	.4399	.5965
50	4	.4362	.5451
51	1	.4625	.6549
52	4	.4266	.5872
53	3	.5165	.6276
54	3	.4713	.4954
55	4	.5598	.6432
56	3	.5608	.7013

* .35
** .40

TSTAT was also computed on the effectiveness instrument using the same scales. Examination of these scores revealed that all items exceeded the desired correlations both with scale and with total. Alpha coefficients for effectiveness were higher for all scales and the total instrument than they were for expectations. These results are presented in Appendix E.

Tests of the Hypotheses

Six hypotheses were formulated for investigation in this study. In this section the hypotheses are restated and a discussion of findings pertinent to each is included.

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The first three hypotheses, as stated, were:

Hypothesis One: There are no significant differences between principals and unit leaders regarding role expectations held for the unit leader in conducting unit functions.

Hypothesis Two: There are no significant differences between principals and unit teacher. regarding role expectations held for the uni eader in conducting unit functions.

Hypothesis Three: There are no significant differences between unit leaders and unit teachers regarding role expectations held for the unit leader in conducting unit functions.

The first three hypotheses were tested by determining the significance of the difference among and between the expectation scores of the principals, unit leaders, and teachers for each of the four scales of the ULRA. One-way analysis of variance was the statistic employed for examining among group variance and t-tests were used to determine where significant differences existed between groups.

The analyses of variance resulted in F values that were significant for the scales dealing with intra-organizational relationships and instructional coordination.

Table XX presents the F values and their level of significance by scale. The group means of all possible combinations of groups in the two scales that produced

significant F values were also tested for between group significance using t-tests. These results are presented in Tables XXI and XXII.

TABLE XX

F VALUES RESULTING FROM ONE WAY ANALYSES OF VARIANCE OF THE EXPECTATIONS SCORES OF THE PRINCIPALS, UNIT TEACHERS AND UNIT LEADERS BY SCALE

Scale	F-Ratio	Significant Level
Intra-Organizational Relationships	4.107	.019*
Extra-Organizational Relationships	1.274	.283
Instructional Coordination	10.250	.000*
Management Activities	2.447	.090

*Significant at the .05 level
All f tests performed on 2,135 df.

Table XXI demonstrates that a statistically significant difference existed regarding the expectations held by principals and teachers on the intra-organizational relationship scale. Therefore hypothesis number two was rejected for the intra-organizational relationship scale. It should be pointed out, however, that the difference in the means of the two groups was only .17 and, therefore, the difference, while statistically significant, may have little practical significance.

TABLE XXI

T-TESTS OF GROUP MEANS FOR INTRA-ORGANIZATIONAL RELATIONSHIP SCALE

	Principals	Unit Leaders	Teachers
Principals	4.65	1.506	2.865*
Unit Leaders	.09	4.56	1.359
Teachers	.17	.08	4.48

*Critical Values: 2.014 @.05
2.690 @.01

Note: Values above diagonal are t values.
Diagonal values are group means.
Values below diagonal are differences in means.

Table XXII indicates that both principals and unit leaders and principals and teachers differed significantly regarding the expectations they hold for unit leaders on the instructional coordination scale. Therefore hypotheses one and two can be rejected for the instructional coordination scale. Hypotheses one and two must be accepted for the remaining scales and hypothesis number three must be accepted for all scales. It should be noted that a significant t value (2.152) was manifested between principal and unit leader differences on expectations for the management activities scale despite the fact that no significant F value was derived for among group differences. Analyses were also performed on an item basis both between and among groups. These results are presented by scale in Appendix F.

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TABLE XXII

T-TESTS OF GROUP MEANS FOR INSTRUCTIONAL COORDINATION SCALE

	Principals	Unit Leaders	Teachers
Principals	4.39	3.503*	4.236*
Unit Leaders	.29	4.10	.732
Teachers	.36	.07	4.03

*Critical Values: 2.014 @.05
2.690 @.01

Note: Values above diagonal are t values.
Diagonal values are group means.
Values below the diagonal are differences in means.

Correlational analysis was conducted in order to determine the relationship between agreement on expectations and ratings of performance effectiveness as sought by hypotheses four, five and six. The degree of linear relationship between two variables is expressed by a Pearson product-moment correlation coefficient which was the method employed here. The test assumes a bivariate normal distribution for the variables and has a Student t distribution. The resulting r was considered significant when the critical value exceeded .292 on table of r with df=44.

Hypothesis Four: There is no significant relationship between principal and unit leader agreement on expectations held for the unit leader's role

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and principal's ratings of the unit leader's performance effectiveness.

The data for testing this hypothesis included two agreement scores. The signed differences between principals and unit leaders on each of the scales was correlated with principal's ratings of the unit leader's performance effectiveness for each scale. Since signed differences can be both positive and negative, it was expected that these scores would be sensitive to the distribution of responses about the midpoint.

The second score was the absolute difference between principals and unit leaders on each of the scales which represents the magnitude of discrepancy between the two without considering the sign. Absolute differences were also correlated with principal's ratings of the unit leader's performance effectiveness for each scale.

A Pearson product-moment correlation was computed for each of the eight combinations of variables and tested for significance. The resulting correlation coefficients are presented in Table XXIII. None of the coefficients produced using either the signed differences or the absolute differences exceeded the established critical value of .292. Thus, the null hypothesis was accepted and it was concluded that there was no relationship in either the extent or the nature of principal and unit leader agreement on expectations and the principal's rating of the unit leader's performance effectiveness.

TABLE XXIII

CORRELATION COEFFICIENTS FOR THE CONGRUENCE OF EXPECTATIONS HELD BY THE PRINCIPALS AND UNIT LEADERS AND THE PRINCIPAL'S RATING OF UNIT LEADER'S EFFECTIVENESS

Scale	r (signed)	r (absolute)
Intra-Organizational Relationships	.217	.018
Extra-Organizational Relationships	.256	.122
Instructional Coordination	.105	.082
Management Activities	.175	.047

*Significant at .05 level

Hypothesis Five: There is no significant relationship between unit teacher and unit leader agreement on expectations held for the unit leader's role and unit teachers' ratings of the unit leader's performance effectiveness.

The testing of this hypothesis consisted of correlating both the absolute and signed differences between the expectation scores of unit leaders and the mean expectation scores of teachers with teacher ratings of unit leader performance effectiveness. Again, the correlations were computed for each scale using both signed and absolute differences. The eight correlation coefficients produced from this analysis are presented in Table XXIV. None were found to be significant at the .05 level.

TABLE XXIV

CORRELATION COEFFICIENTS FOR THE CONGRUENCE OF EXPECTATIONS HELD BY THE UNIT TEACHERS AND UNIT LEADERS AND THE UNIT TEACHER'S RATING OF THE UNIT LEADER'S EFFECTIVENESS

Scale	r (signed)	r (absolute)
Intra-Organizational Relationships	-.090	-.061
Extra-Organizational Relationships	.025	-.043
Instructional Coordination	-.178	-.193
Management Activities	-.153	.017

*Significant at .05 level

There was no evidence that a significant relationship existed between teacher and unit leader agreement on expectations and subsequent teacher ratings of unit leader effectiveness as postulated in hypothesis number five. Consequently, the null hypothesis was accepted.

Hypothesis Six: There is no significant relationship between principal and unit teacher agreement on expectations held for the unit leader's role and their mean ratings of the unit leader's performance effectiveness.

Hypothesis number six was tested by correlating the following data:

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1) the signed difference between expectation scores of principals and unit teachers and their mean ratings of the unit leader's performance effectiveness, and,

2) the absolute difference between expectation scores of principals and unit teachers and their mean ratings of unit leader performance effectiveness. Analysis was conducted for each of the four scales of the ULRA. Mean scores of teachers were again used.

The analysis yielded no correlation coefficients which were significant at the .05 level as shown in Table XXV. Since no basis was found for assuming that a significant relationship existed between principal and unit teacher congruence on expectations and their mean rating of unit leader performance effectiveness, the null hypothesis was accepted.

TABLE XXV

CORRELATION COEFFICIENTS FOR THE CONGRUENCE OF EXPECTATIONS HELD BY PRINCIPALS AND UNIT TEACHERS AND THEIR MEAN RATINGS OF THE UNIT LEADER'S EFFECTIVENESS

Scale	r (signed)	r (absolute)
Intra-Organizational Relationships	.011	-.103
Extra-Organizational Relationships	.117	-.248
Instructional Coordination	.026	.221
Management Activities	.041	.059

*Significant at .05 level

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Correlations were also computed between agreement on expectations and overall effectiveness ratings for all possible combinations of groups. The effectiveness score used in these correlations was an experimentally independent measure obtained by asking each of the respondent groups to rate the overall effectiveness of the unit leader in performing unit functions. These results are presented in Tables XXVI, XXVII, and XXVIII. Only two coefficients exceeded the critical value of .292, thereby providing additional support for accepting hypotheses four, five, and six.

TABLE XXVI

CORRELATION COEFFICIENTS FOR THE CONGRUENCE OF EXPECTATIONS HELD BY THE PRINCIPALS AND UNIT LEADERS AND THE PRINCIPAL'S RATING OF THE UNIT LEADER'S OVERALL EFFECTIVENESS

Scale	r (signed)	r (absolute)
Intra-Organizational Relationships	-.148	-.101
Extra-Organizational Relationships	-.125	.080
Instructional Coordination	-.153	-.053
Management Activities	-.385*	-.121

*Significant at .05 level

TABLE XXVII

CORRELATION COEFFICIENTS FOR THE CONGRUENCE OF EXPECTATIONS HELD BY THE UNIT TEACHERS AND UNIT LEADERS AND UNIT TEACHERS' RATINGS OF THE UNIT LEADER'S OVERALL EFFECTIVENESS

Scale	r (signed)	r (absolute)
Intra-Organizational Relationships	-.096	-.055
Extra-Organizational Relationships	.251	.014
Instructional Coordination	-.043	-.295*
Management Activities	-.141	-.080

*Significant at .05 level

TABLE XXVIII

CORRELATION COEFFICIENTS FOR THE CONGRUENCE OF EXPECTATIONS HELD BY PRINCIPALS AND UNIT TEACHERS AND THEIR MEAN RATINGS OF THE UNIT LEADER'S OVERALL EFFECTIVENESS

Scale	r (signed)	r (absolute)
Intra-Organizational Relationships	-.017	-.139
Extra-Organizational Relationships	.009	-.156
Instructional Coordination	-.156	.031
Management Activities	-.257	.097

*Significant at .05 level

A revealing aspect of the analysis of the data regarding all six hypotheses concerned the nature of the distributions of the variables involved. Responses to the ULRA by all three respondent groups were skewed in a highly positive direction, i.e., all groups tended to perceive the tasks as being "absolutely must" for the unit leader to perform. Moreover, they tended to rate the unit leader as "effective" in performing them. The fact that all three respondent groups were consistent and emphatic in their responses justifies the instrument as providing an adequate measure of the unit leader role.

Note, however that the skewed distributions observed tend to lessen the magnitude of correlation and possibly also attenuate differences in means. Thus, if statements had been rephrased so that frequency distributions had been more symmetric about their midpoints, the results might have been quite different. In particular, the assumption of normalcy for testing correlations was wrong, and thus the results must be viewed with caution, since this affects both the magnitude and direction of resulting coefficients. Therefore, it seems evident that measured by the instrumentation used, there was no significant relationship between agreement on expectations held for the unit leader role and subsequent ratings of unit leader performance effectiveness.

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Ancillary Questions

It was postulated that several organizational factors might influence the extent of agreement on expectations which various referent groups would hold for the unit leader role. Therefore, data were also gathered to ascertain whether or not a significant relationship existed between the following independent variables and referent group agreement on role expectations held for the unit leader in conducting unit functions:

a. size of the school system
b. number of teachers in the unit
c. age span of students in the unit
d. number of students in the unit
e. salary of the unit leader
f. exposure to I.G.E. concepts.

Following preliminary analysis of the available data, it was concluded that the information relating to salary of unit leaders was too incomplete to be used and the salary variable was therefore eliminated. Specifically, inspection of the data revealed that twenty-two unit leaders were provided no additional salary. Those receiving additional salary received yearly amounts varying from $80.00 to $487.50. Eighteen unit leaders were provided released time for performing unit functions. The amount of time available varied from "an occasional hour" to two hours daily.

Size of school system was measured by the number of professional staff members employed by the district exclusive of central office personnel. Exposure to I.G.E. concepts included attendance at building orientation workshops,

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attendance at principal-unit leader workshops and/or experienced person workshops sponsored by the R & D Center, and completion of college courses in IGE.

Correlations were obtained with these selected organizational variables and: 1) the absolute differences between principals and unit leaders on expectations, 2) the absolute differences between principals and unit teachers on expectations, and 3) the absolute differences between unit leaders and unit teachers on expectations. Correlations were computed for each scale of the ULRA. These results are reported in Tables XXIX, XXX, and XXXI.

As the data in the tables indicate, agreement on expectations between principals and unit leaders regarding the extra-organizational relationships scale was significantly correlated with participation in a building orientation prior to implementing IGE. No other significant correlations were produced by this analysis.

Summary

The results obtained from analysis of data gathered from forty-six principals, forty-six unit leaders and ninety-two unit teachers representing forty-six Wisconsin elementary schools were reported in this chapter. Data were analyzed on the basis of the four scales of the ULRA produced by factor analysis. A demographic profile of the respondent groups was presented. Measures used to establish the validity and reliability of the instrument were discussed.

TABLE XXIX

CORRELATION COEFFICIENTS FOR SELECTED ORGANIZATIONAL VARIABLES AND THE CONGRUENCE OF EXPECTATIONS HELD BY PRINCIPALS AND UNIT LEADERS

	Intra-Org. Relation.	Extra-Org. Relation.	Instruct. Coord.	Management Activities
Size of District	-.136	-.203	.047	.037
Teachers in Unit	-.074	.148	.094	-.131
Age Span of Students	-.015	.098	-.138	-.234
Number of Students	-.102	.165	.227	-.151
Building Orientation	-.023	-.328*	-.066	.177
Experienced Person Institute	-.156	-.132	.068	-.038
Principal-Unit Leader Workshop	-.026	-.133	-.103	-.123
I.G.E. Courses	.055	.133	-.053	.232

*Significant at .05 level

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TABLE XXX

CORRELATION COEFFICIENTS FOR SELECTED ORGANIZATIONAL VARIABLES AND THE CONGRUENCE OF EXPECTATIONS HELD BY PRINCIPALS AND UNIT TEACHERS

	Intra-Org. Relation.	Extra-Org. Relation.	Instruct. Coord.	Management Activities
Size of District	.134	-.052	.117	.246
Teachers in Unit	-.038	-.117	.099	-.011
Age Span of Students	.126	-.010	.043	-.008
Number of Students	-.002	-.116	.017	-.185
Building Orientation	-.071	-.194	.017	.143
Experienced Person Institute	-.109	.095	.153	.229
I.G.E. Courses	-.009	.026	.157	.034

*Significant at .05 level

TABLE XXXI

CORRELATION COEFFICIENTS FOR SELECTED ORGANIZATIONAL VARIABLES AND THE CONGRUENCE OF EXPECTATIONS HELD BY UNIT LEADERS AND UNIT TEACHERS

	Intra-Org. Relation.	Extra-Org. Relation.	Instruct. Coord.	Management Activities
Size of District	-.051	.044	.072	-.088
Teachers in Unit	.259	.080	.043	.100
Age Span of Students	.095	-.041	.048	.010
Number of Students	.098	.163	-.104	.131
Building Orientation	.080	-.004	-.217	.103
Experienced Person Institute	-.079	-.005	-.003	-.203
I.G.E. Courses	-.073	.015	-.008	.000

*Significant at .05 level

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Six operational null hypotheses were tested by analysis of variance and correlation statistical techniques. All hypotheses were accepted with the exception of hypothesis number one as it related to principal-unit leader expectations on the instructional coordination scale and hypothesis number two as it related to principal-teacher expectations on the intra-organizational and instructional coordination scales.

Correlational analyses were conducted on several organizational variables and the extent of agreement on expectations held by principals, unit leaders, and teachers for the unit leader role. None of the variables manifested a significant relationship for more than one scale.

Chapter IV will present a summary of the study and discuss the findings, conclusions, and implications of the study.

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CHAPTER IV

SUMMARY, FINDINGS, CONCLUSIONS AND IMPLICATIONS

This chapter consists of three sections. The first section contains a summary of the study as presented in the first three chapters. The second section presents a discussion of the findings of the study and the conclusions that may be drawn from them. The chapter concludes with a discussion of the implications for practice and further research which may be suggested from the results of this study.

Summary

This study was designed to investigate the perceived role expectations and performance effectiveness of the unit leader in conducting unit functions. The purpose of the study was twofold: 1) to determine the extent of agreement between principals, teachers, and unit leaders regarding expectations held for the unit leader role, and 2) to examine the relationship between referent group agreement on role expectations and performance effectiveness ratings. It was hypothesized that there is a positive relationship between agreement on role expectations and subsequent ratings of performance effectiveness.

Chapter I placed the study in historical perspective by tracing the antecedents of current attempts to uncrade the elementary school and individualize instruction. The components of individually guided education as proposed by the Wisconsin R & D Center were presented as a total system of education. The unit leader was defended as a focal position in the MUS-E organizational structure. Research studies dealing with the MUS-E structure were reviewed and discrepancies between prototype and practice were noted. Due to varying descriptions and definitions of the unit leader role and the paucity of empirical studies, it was considered essential that empirical research be conducted which focused on the unit leader role.

Social systems theory as adapted to education by Getzels and Guba was defined and presented as the theoretical base for the study. Previous research studies of role expectations and effectiveness, as well as literature on social systems theory, demonstrated the utility of the social systems model for understanding and assessing behavioral outcomes in terms of effectiveness and defining roles in terms of expectations.

Through the use of the social systems model, six hypotheses were formulated for investigating differences between referent groups regarding role expectations and the relationship between agreement on expectations and subsequent ratings of performance effectiveness. The relationship

between selected organizational variables and agreement on expectations was also investigated.

Chapter II presented the design and methodology of the study. The study sample consisted of 48 principals, 48 unit leaders, and 96 teachers who represented the population of 52 Wisconsin elementary schools that had implemented IGE in the fall of 1971. Unit leaders and teachers were randomly selected using computer capabilities. Data were gathered by a survey questionnaire which was mailed to the principal of each building and returned upon completion by each individual.

The Unit Leader Role Analysis (ULRA) instrument was developed and pilot tested by the researcher prior to the collection of data. The ULRA consisted of 56 statements of tasks which the R & D Center prototypic model and practitioners indicated were representative of tasks performed by unit leaders. The instrument was tested for validity and reliability and factor analyzed into four constructs. Each respondent group was asked to indicate how important each of the tasks were and then to rate the unit leader's effectiveness in performing them. Each respondent was also requested to provide background information.

Chapter III presented the analysis of the data. A demographic profile was provided which included background information for all respondent groups. Differences among

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respondent groups in role expectations were analyzed using one-way analysis of variance for each scale of the ULRA. T tests were performed for each scale between all possible combinations of groups when the f value produced by analysis of variance proved significant.

The relationship between the extent of agreement on expectations and ratings of performance effectiveness was tested by means of the Pearson product-moment correlation coefficient. Pearson product-moment correlation was also used to test the relationship between agreement on expectations and selected organizational variables. Point biserial correlation was the statistic used to test the relationship between agreement on expectations and exposure to IGE concepts.

Findings and Conclusions

This section contains an analysis of the results obtained and the conclusions that may be drawn from the tests of the hypotheses and ancillary questions posed for the study. The probability level for all tests of statistical significance was established at .05.

The first hypothesis stated: "There are no significant differences between principals and unit leaders regarding role expectations held for the unit leader in conducting unit functions." The hypothesis was partially rejected. One-way analysis of variance produced a statistically significant f value among groups for differences in the

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EXPECTATIONS					TASKS	EFFECTIVENESS				
AM	PS	MMN	PSN	AMN		VE	E	NEI	I	VI
—	—	—	—	—	20. Teach or be directly involved with children at least 1/2 time	—	—	—	—	—
—	—	—	—	—	21. Assist in evaluating the achievement of schoolwide objectives.	—	—	—	—	—
—	—	—	—	—	22. Plan with appropriate personnel the research activities for the unit.	—	—	—	—	—
—	—	—	—	—	23. Keep abreast of advances in IGE through visits, conferences, and meetings.	—	—	—	—	—
—	—	—	—	—	24. Attend all meetings of the IIC.	—	—	—	—	—
—	—	—	—	—	25. Recommend the curricular areas to be incorporated into the IGE model within the unit.	—	—	—	—	—
—	—	—	—	—	26. Encourage parents to attend unit meetings or observe in the school.	—	—	—	—	—
—	—	—	—	—	27. Hold the unit staff accountable for student achievement.	—	—	—	—	—
—	—	—	—	—	28. Seek the advice and counsel of the principal in handling special unit problems.	—	—	—	—	—

EXPECTATIONS					TASKS	EFFECTIVENESS				
AM	PS	MMN	PSN	AMN		VE	E	NEI	I	VI
—	—	—	—	—	29. Facilitate communication between central office personnel, consultants, and unit staff.	—	—	—	—	—
—	—	—	—	—	30. Coordinate the activities of special teachers in the unit.	—	—	—	—	—
—	—	—	—	—	31. Recommend special resources and personnel needed to accomplish the unit's instructional task.	—	—	—	—	—
—	—	—	—	—	32. Meet informally with parents to discuss the unit's instructional program.	—	—	—	—	—
—	—	—	—	—	33. Cooperate with IIC members in coordinating schoolwide facilities and resources.	—	—	—	—	—
—	—	—	—	—	34. Coordinate the placement and supervision of student teachers or interns in the unit.	—	—	—	—	—
—	—	—	—	—	35. Provide information to other units and schools regarding promising practices.	—	—	—	—	—
—	—	—	—	—	36. Assist in collecting, evaluating, and interpreting data needed for instructional improvement.	—	—	—	—	—

EXPECTATIONS					TASK	EFFECTIVENESS				
AM	PS	MMN	PSN	AMN		VE	E	NEI	I	VI
—	—	—	—	—	37. Establish workloads that utilize the special interests and abilities of all unit staff.	—	—	—	—	—
—	—	—	—	—	38. Confer informally with unit staff members to discuss ways of improving instruction.	—	—	—	—	—
—	—	—	—	—	39. Channel information from a variety of sources to unit teachers.	—	—	—	—	—
—	—	—	—	—	40. Orient unit teachers to school and district policies and procedures.	—	—	—	—	—
—	—	—	—	—	41. Observe on request the instructional presentations of unit staff and provide feedback aimed at improving instruction.	—	—	—	—	—
—	—	—	—	—	42. Conduct demonstration lessons for unit staff members using new materials and procedures.	—	—	—	—	—
—	—	—	—	—	43. Participate in the formulation of policies for implementing instructional improvement in the schoolwide IGE program.	—	—	—	—	—
—	—	—	—	—	44. Make certain that each child is engaged in appropriate one-to-one, small group, class size or large group activities.	—	—	—	—	—

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EXPECTATIONS					TASKS	EFFECTIVENESS				
AM	PS	MMN	PSN	AMN		VE	E	NEI	I	VI
—	—	—	—	—	45. Facilitate formal communication between the unit staff and the principal.	—	—	—	—	—
—	—	—	—	—	46. Take the initiative in developing new instructional procedures within the unit.	—	—	—	—	—
—	—	—	—	—	47. Participate in developing the school's inservice teacher education program.	—	—	—	—	—
—	—	—	—	—	48. Alter unit plans and procedures when evaluation indicates such a need.	—	—	—	—	—
—	—	—	—	—	49. Participate in the selection of professional staff assigned to the unit.	—	—	—	—	—
—	—	—	—	—	50. Direct unit staff in selecting or preparing written behavioral objectives for each curricular area.	—	—	—	—	—
—	—	—	—	—	51. Coordinate the assessment of children's characteristics prior to initial grouping.	—	—	—	—	—
—	—	—	—	—	52. Develop rules and regulations for the day-to-day operation of the unit.	—	—	—	—	—

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EXPECTATIONS					TASKS	EFFECTIVENESS				
AM	PS	MMN	PSN	AMN		VE	E	NEI	I	VI
—	—	—	—	—	53. Facilitate effective interaction between and among members of the unit.	—	—	—	—	—
—	—	—	—	—	54. Coordinate the assessment of students in the unit based on individual objectives.	—	—	—	—	—
—	—	—	—	—	55. Schedule and chair unit meetings.	—	—	—	—	—
—	—	—	—	—	56. Direct unit staff in writing or selecting instructional objectives for each student.	—	—	—	—	—
—	—	—	—	—	57. Establish with unit staff daily time schedules for instructional activities.	—	—	—	—	—
—	—	—	—	—	58. Provide for the utilization of consultants and resource personnel.	—	—	—	—	—
—	—	—	—	—	59. Assist unit teachers with instructional activities, materials, and procedures when requested.	—	—	—	—	—
—	—	—	—	—	60. Secure unit staff compliance with established school regulations.	—	—	—	—	—
—	—	—	—	—	61. Schedule the use of special school facilities, equipment and materials needed by the unit.	—	—	—	—	—

EXPECTATIONS					TASKS	EFFECTIVENESS				
AM	PS	MMN	PSN	AMN		VE	E	NEI	I	VI
—	—	—	—	—	62. Participate in establishing a system of reporting that involves teacher, parent and child.	—	—	—	—	—
—	—	—	—	—	63. Coordinate the initial and subsequent regrouping of students based on needs, interests, and attainment of objectives.	—	—	—	—	—
—	—	—	—	—	64. Participate in the selection of nonprofessional staff assigned to the unit.	—	—	—	—	—

OVERALL EFFECTIVENESS

PLEASE INDICATE THE LEVEL OF THE UNIT LEADER'S OVERALL EFFECTIVENESS IN CONDUCTING UNIT FUNCTIONS. (Circle one)

A. The unit leader is VERY EFFECTIVE in conducting unit functions.

B. The unit leader is EFFECTIVE in conducting unit functions.

C. The unit leader is NEITHER EFFECTIVE NOR INEFFECTIVE in conducting unit functions.

D. The unit leader is INEFFECTIVE in conducting unit functions

E. The unit leader is VERY INEFFECTIVE in conducting unit functions.

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GENERAL INFORMATION DATA SHEET

UNIT LEADER

PLEASE FILL IN THE BLANKS WITH THE APPROPRIATE INFORMATION:

_____ 1. Date of Birth (Day-Month-Year)

_____ 2. Sex Male (M) Female (F)

_____ 3. Professional Training Level
Less than BA, BA, BA+15, MA, MA+16, MA+32

_____ 4. Total years of teaching experience.
(Do not include this year)

_____ 5. Total years of teaching experience in present district.
(Do not include this year)

_____ 6. Total number of professional staff in your unit.
(Include yourself) (Include only full-time people)

_____ 7. Lowest age/grade of students in your unit.

_____ 8. Highest age/grade of students in your unit.

_____ 9. Total number of students in your unit.

_____ 10. Number of paraprofessionals in your unit.
(Indicate by full-time equivalency-for example, if you have one aide that works full-time and one that works half-time enter 1-1/2)

_____ 11. How much more pay do you receive in your regular contract for serving as unit leader than a teacher with equal experience and preparation?

_____ 12. How many hours per week do you have on the average for performing unit leader duties?

_____ 13. Have you participated in a 5-day institute for experienced multi-unit personnel?

_____ 14. Have you participated in a 3-day workshop for building principals and unit leaders prior to starting out as a MUS-E?

_____ 15. Have you participated in a workshop of 1-5 days duration for the entier building staff prior to starting out as a MUS-E?

_____ 16. Have you taken a course dealing with IGE/MUS-E on a college campus?

_____ 17. Have you participated in some other organized program or activity to become familiar with the Center's role descriptions for unit leaders? Describe briefly:

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expectations they held for the unit leader in performing tasks related to intra-organizational relationships and instructional coordination. Subsequent t tests produced a statistically significant difference between principals and unit leaders for tasks related to instructional coordination.

The second hypothesis stated: "There are no significant differences between principals and unit teachers regarding role expectations held for the unit leader in conducting unit functions." The second hypothesis was partially rejected. The analysis of among group differences in expectations produced significant f values for tasks performed by unit leaders which related to intra-organizational relationships and instructional coordination. Subsequent t tests manifested significant differences between principals and unit teachers for tasks related to instructional coordination and intra-organizational relationships.

The third hypothesis stated: "There are no significant differences between unit leaders and unit teachers regarding role expectations held for the unit leader in conducting unit functions." The hypothesis was accepted. Again, the analysis of among-group differences in expectations produced significant f values for the intra-organizational relationships and instructional coordination scales, however the subsequent t tests produced no significant differences in expectations between unit leaders and unit teachers.

The fourth hypothesis stated: "There is no significant relationship between principal and unit leader agreement on expectations held for the unit leader's role and principal's ratings of the unit leader's performance effectiveness." The hypothesis was accepted. Correlational analysis was conducted using both signed and absolute differences in expectations and principal ratings of unit leader effectiveness in performing unit functions. These analyses produced no correlations that exceeded the critical value necessary for significance at the .05 level.

Hypothesis number five stated: "There is no significant relationship between unit teacher and unit leader agreement on expectations held for the unit leader's role and unit teachers' ratings of the unit leader's performance effectiveness." The hypothesis was accepted. Correlation of agreement on expectations between unit leaders and unit teachers and unit teacher ratings of unit leaders' performance effectiveness produced no statistically significant correlations. Again, both the signed and absolute differences in expectations were used in computing correlations.

Hypothesis number six stated: "There is no significant relationship between principal and unit teacher agreement on expectations held for the unit leader's role and their mean ratings of the unit leader's performance effectiveness." The hypothesis was accepted. Correlation

of principal and unit teacher mean ratings of the unit leader's performance effectiveness with principal and unit teacher agreement on expectations failed to produce a correlation that exceeded the critical value for any of the four scales of the ULRA.

Correlations between agreement on expectations and a single independent measure of overall effectiveness produced a significant correlation between principal and unit leader signed differences in agreement for tasks relating to management activities and principal ratings of the unit leader's overall effectiveness. A significant correlation was also manifested between teacher and unit leader absolute differences in agreement on expectations for tasks related to instructional coordination and teacher ratings of the unit leader's overall effectiveness.

Correlations computed between independent variables relating to size of school system, number of teachers in the unit, age span of students in the unit, and number of students in the unit, and referent group agreement on role expectations failed to produce any statistically significant values. Referent group exposure to IGE concepts was also correlated with extent of agreement on role expectations. Principal and unit leader agreement on role expectations regarding the extra-organizational relationships scale was significantly correlated with participation in a building orientation held for all staff members prior to implementing IGE.

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It can be concluded from an analysis of the data that referent group and self-perceptions of unit leader role expectations were consistently similar. The assumption that the principal referent groups in the MUS-E differ as to their expectations for the unit leader's role was not verified by the study.

While differences did exist between principals and unit leaders regarding instructional coordination tasks and between principals and teachers regarding intra-organizational and instructional coordination tasks it would appear that these differences were primarily due to a lack of mutual understanding regarding the tasks the unit leader should be expected to perform. This lack of common comprehension of the unit leader's role may be a reflection of the differing nature of the respondent groups in training, experience, and orientation.

The fact that principals differed from both unit leaders and teachers regarding expectations for instructional tasks suggests that this area is in need of further clarification. While the analysis of differences in expectations provided evidence that significant differences existed between expectations held by principals and unit leaders and principals and unit teachers for selected tasks, no significant differences were produced between unit teachers and unit leaders. This may be explained by the fact that the relationship which exists between unit

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teachers and unit leaders is different from the relationship which exists between principals and either of these groups.

On the basis of the evidence produced by this investigation, it cannot be assumed that there is a significant relationship between the extent of agreement on expectations for the unit leader's role as perceived by principals, teachers, and unit leaders and teacher or principal ratings of the unit leader's effectiveness. This may mean that ratings of unit leader performance effectiveness by principals and teachers are based on factors other than the extent of agreement on expectations. While the present study suggests that existential differences between principals, unit leaders, and unit teachers regarding unit leader role expectations are minimal, such differences may exist in the intraceptive or communicative dimensions.

In any case, failure in this investigation to show a significant relationship between agreement on expectations and ratings of performance effectiveness does not provide conclusive evidence that no significant relationship exists. The results of other investigations, as well as logic, suggest that such a relationship could exist. The fact that the effectiveness instrument used in this study produced a consistently high level of effectiveness

and a small variance may indicate that the instrument did not provide a sufficiently precise measure of the effectiveness of the unit leader's performance. Perhaps, if more were known about the nature of effectiveness, then the means of measurement could be improved and meaningful relationships might be revealed in subsequent investigations.

The results of this study suggest that the organizational variables related to district size, number of teachers in the unit, number of students in the unit, and age span of students in the unit are not related to referent group agreement on expectations. Moreover, the findings revealed that the respondents' exposure to preservice and inservice activities dealing with IGE concepts was not related to agreement on expectations.

Social systems theory, which was used as the theoretical basis for this study, was supported by the results of the study. Variances were not found between respondent groups in perceiving the unit leader's role; therefore, according to the model, there would be high ratings of unit leader effectiveness. This investigation did, indeed, find that referent groups agreed on unit leader role expectations and that they tended to rate the unit leader as being effective in performing those expectations. Since agreement on expectations for a focal role

influences subsequent ratings of performance effectiveness as hypothesized in this research, the model presented in Chapter I, (Figure 2), depicting the relation of role expectations to effective behavior appears to have been verified.

The conclusions that were drawn from the study are limited to the population of multiunit elementary schools from which the sample was drawn. The conclusions are also limited by the use of self-report instruments which are perceptual as opposed to direct measures. The conclusions are further limited by the fact that the instrument used to collect the data was not standardized and therefore it is more difficult to ascertain validity and reliability estimates. Random and systematic error in measurement due to noncontrolled testing conditions further limit the conclusions. Finally, interpretation of the study's findings must be constrained by the degree to which acceptance can be made of the assumptions underlying both the statistical procedures and the theoretical framework employed.

Implications for Practice and Further Research

Despite the foregoing limitations, evidence has been obtained from the sample schools to warrant suggesting the following implications for practice and for further research.

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This study has revealed that the expectations held for unit leaders by principals, unit teachers and unit leaders themselves are fairly consistent. This consistency in expectations indicates that the ULRA has provided a useful and accurate measure of the role of the unit leader. Therefore, it would seem that efforts should be undertaken to consider tasks related to intra-organizational relationships, extra-organizational relationships, instructional coordination and management activities in the training of unit leaders. Further, job descriptions of unit leaders could be developed using the task items of the ULRA which would provide assistance in the selection, justification, and utilization of unit leaders in multiunit elementary schools. Finally, the task items can be used as a measure against which the performance effectiveness of unit leaders can be judged.

The instrument developed to collect data for this study included several tasks which were related to management activities. Many of these tasks were not included in the prototypic role of the unit leader as developed by the R & D Center. However, since principals, unit leaders, and unit teachers were in general agreement that these tasks were included in the domain of the unit leader role it would seem logical to suggest that the prototypic role of the unit leader should be revised in light of this information.

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Several questions for further research have been raised by this study. Researchers concerned with IGE may find the following questions of interest:

1. Would a sample which covered a larger geographic area have produced the same extent of agreement regarding expectations for the unit leader role? Implied in this recommendation is the refinement of the instrumentation and a reassessment of the scales which have been established.

2. Would data gathered to determine the actual decision points in the multiunit organizational structure have substantiated the fact that unit leaders make decisions regarding the tasks investigated here, or would these be found to be decisions made by the unit in a participatory decision-making process?

3. What are the differences between the ideal and actual role of the unit leader as viewed by various referent groups, and what is the relationship of this difference to subsequent effectiveness ratings?

4. Does extent of agreement on expectations for the unit leader role relate to student achievement, climate of the unit, student morale, and other output variables?

5. What is the relationship between the type of leader behavior demonstrated by the unit leader in performing unit functions and subsequent ratings of unit leader effectiveness or the satisfaction level of unit staff?

6. In what way would fulfillment of identified personal needs substantiate the expectations of the unit leader role as defined by the tasks in the four scales of

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the ULRA? (It is assumed that the tasks of the ULRA could be used to obtain a measure of personality needs of the unit leader by changing the instrument prompt to: "To what extent do you need, like, want . . .")

7. In what way would personality variables of unit leaders, such as, achievement drive, upward mobility, and social ability, be related to outcome variables such as student achievement and morale?

8. In what way would a measure of interpersonal behavior regarding unit personnel obtained by an instrument such as FIRO-B, be related to production, orientation, and informality?

9. What is the extent of complementarity between the principal and the unit leader role in a unitized elementary school?

10. Is the relationship between extent of agreement on expectations and degree of effectiveness linear or curvilinear in nature?

11. Does consensus regarding expectations held for the behavior of the unit leader increase as the members of the unit interact over a longer period of time?

12. Which scales of the ULRA contribute more significantly than others to the overall performance effectiveness rating given unit leaders by referent groups? Such a question could be investigated through the use of multiple regression analysis.

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13. Would data obtained by prolonged observation of the unit leader in a job performance setting substantiate the tasks developed by the ULRA?

In conclusion, it is the author's hope that this study will provide greater insight into the nature of the unit leader role and that it will encourage other researchers to investigate with greater precision those questions raised by the study.

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APPENDIX A

UNIT LEADER PANEL QUESTIONNAIRE

THE UNIVERSITY OF WISCONSIN
MADISON, WISCONSIN 53706

The School of Education
Department of Educational Administration
WARF Building,
610 Walnut Street

October, 1972

Dear _____:

We are presently developing a role instrument which will measure expectations and effectiveness of unit leaders in performing unit functions. As a recognized expert on the unit leader role, your assistance is being requested in validating role items. Would you please evaluate the attached listing of role items using the following code?

_____ item is acceptable as stated

_____ item is not in the universe of unit leader role

_____ item is in the universe, however it is not logically stated or is not in agreement with other items.

Please feel free to change statements. Your assistance is also requested in adding appropriate statements not presently included. Thank you for your interest and assistance.

Sincerely,

Terrance J. Sheridan, Researcher
Educational Administration
University of Wisconsin
Madison, Wisconsin 53706
608 263-2733

James M. Lipham, Professor
Educational Administration
University of Wisconsin
Madison, Wisconsin 53706
608 263-2713

UNIT LEADER ROLE ITEMS

_____ 1. Oversee the utilization of paraprofessionals to the unit.

_____ 2. Participate in the recruitment and selection of professional staff assigned to the unit.

_____ 3. Seek the advice and counsel of the principal in handling special unit problems.

_____ 4. Insure that plans and procedures are altered when evaluation indicates such a need.

_____ 5. Participate in the formulation of policies for implementing instructional improvement in the schoolwide IGE program.

_____ 6. Establish with unit staff daily time schedules for instructional activities.

_____ 7. Direct the development of the instructional budget for the unit.

_____ 8. Insure that effective interaction is maintained between and among members of the unit.

_____ 9. Introduce new or novel measurement and evaluation tools and procedures in the unit.

_____ 10. Assume leadership in interpreting the school's program to the community.

_____ 11. Direct unit staff efforts in preparing written behavioral objectives.

_____ 12. Develop and implement with other personnel an inservice teacher education program for the unit staff.

_____ 13. Orient unit teachers to school and district policies and procedures.

_____ 14. Provide appropriate inservice training for paraprofessionals assigned to the unit.

_____ 15. Display concern for the feelings of individual members of the unit.

_____ 16. Assist in evaluating the achievement of schoolwide objectives.

_____ 17. Provide for the assessment of individual students based on prepared objectives.

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_____ 18. Cooperate with IIC members in coordinating schoolwide facilities and resources.

_____ 19. Facilitate formal communication between the unit and the IIC.

_____ 20. Develop procedures for the collection of milk and lunch money in the unit.

_____ 21. Establish workloads that are equitable for all unit staff.

_____ 22. Schedule and conduct unit meetings.

_____ 23. Provide for the utilization of consultants and resource personnel.

_____ 24. Obtain media, material and supplies needed by the unit staff to conduct planned instructional activities.

_____ 25. Handle discipline problems referred by unit teachers.

_____ 26. Channel information to unit teachers from a variety of sources.

_____ 27. Make arrangements for field trips.

_____ 28. Insure that communication is maintained between central office personnel, various consultants, and the unit.

_____ 29. Provide unit staff with information regarding advances in subject knowledge and promising instructional materials.

_____ 30. Take the initiative in developing new instructional procedures within the unit.

_____ 31. Keep abreast of advances in components of a system of IGE through visits, conferences and meetings.

_____ 32. Assume leadership in initiating, establishing and maintaining home-school relations.

_____ 33. Provide for the proper briefing of observers to the unit.

_____ 34. Insure that individual instructional objectives are written for each student.

_____ 35. Be accountable to the principal for the achievement of children in the unit.

_____ 36. Coordinate the assessment of children's characteristics prior to initial grouping.

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____ 37. Provide individual support and assistance to new and beginning teachers in the early stages of their multi-unit experience.

____ 38. Assist unit teachers in the assessment and modification of student behavior patterns.

____ 39. Substitute for unit teachers to provide them with time to plan.

____ 40. Develop with other personnel the building plan for interns or student teachers.

____ 41. Participate in the recruitment and selection of non-professional staff assigned to the unit.

____ 42. Foster unit staff compliance with established school regulations.

✓ 43. Provide personal advice to unit staff members on personal problems.

____ 44. Give attention to the satisfaction and morale of the unit staff.

____ 45. Supervise and evaluate paraprofessionals assigned to the unit.

____ 46. Resolve interpersonal conflicts within the unit.

____ 47. Supervise the systematic evaluation of total unit performance.

____ 48. Attend all meetings of the IIC.

____ 49. Assist in developing schoolwide objectives basic to confluent education.

____ 50. Schedule the use of special school facilities, equipment and materials needed by the unit.

____ 51. Coordinate the activities of special teachers in the unit.

____ 52. Make certain that each child is engaged in appropriate one-to-one, small group, class size or large group activities.

____ 53. Insure that each unit staff member is engaged in appropriate planning, management and instructional activities.

____ 54. Assume responsibility for completing routine reports.

____ 55. Coordinate the initial and subsequent regrouping of students based on needs and attainment of objectives.

____ 56. Facilitate formal communication between the unit staff and the principal.

____ 57. Confer individually with unit staff members to discuss ways of improving instruction.

____ 58. Encourage parents to convey information, values and feelings regarding the school's program.

____ 59. Conduct demonstration lessons for unit staff members using new materials and procedures.

____ 60. Provide other units and schools with information regarding promising practices.

____ 61. Provide for reporting of student progress to parents in a manner that reflects the IGE MUS-E program.

____ 62. Teach or be directly involved with children about 1/2 time.

____ 63. Select with appropriate personnel the curriculum areas to be incorporated into the IGE model within the unit.

____ 64. Assist unit teachers with instructional activities, materials and procedures they don't feel competent to handle.

____ 65. Coordinate the placement and supervision of student teachers or interns in the unit.

____ 66. Observe instructional presentations of unit staff and provide feedback aimed at improving instruction.

____ 67. Plan research activities for the unit with appropriate personnel.

____ 68. Prepare and distribute an agenda prior to all unit meetings and minutes following each meeting.

____ 69. Develop a systematic program of parent-school, teacher-home visits.

____ 70. Coordinate research activities within the unit.

____ 71. Provide for special types of unit meetings for goal setting, design and evaluation.

____ 72. Participate in establishing a system of reporting that involves teacher, parent and child.

____ 73. Keep abreast of relevant research methods and results.

____ 74. Supervise the use of volunteer community personnel with special expertise to assist in instruction.

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_____ 75. Encourage parents to attend unit meetings or observe in the school.

_____ 76. Assist appropriate personnel in collecting, evaluating, and interpreting data needed for instructional improvement.

_____ 77. Direct the development and maintenance of systematic instructional record keeping for monitoring student progress

_____ 78. Recommend special resources and personnel needed by the unit to accomplish its instructional task.

_____ 79. Develop rules and regulations for the day-to-day operation of the unit.

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APPENDIX B

UNIT LEADER ROLE ANALYSIS QUESTIONNAIRE

PILOT

83

UNIT LEADER ROLE ANALYSIS (ULRA)

(Form UL)

This instrument contains task statements which are descriptive of expectations you may hold for the unit leader in conducting unit functions. Your expectations will indicate the behavior you expect of a unit leader in conducting unit functions in your school. Please react to each statement as follows:

1. To the left of each statement indicate the nature of the expectation you hold for the unit leader in your school to perform each of the identified tasks by checking the appropriate response. Choices include: ABSOLUTELY MUST (AM), PROBABLY SHOULD (PS), MAY OR MAY NOT (MMN), PROBABLY SHOULD NOT (PSN), AND ABSOLUTELY MUST NOT (AMN).

2. To the right of each statement rate the effectiveness of the unit leader in performing each task. Choices for effectiveness ratings include: VERY EFFECTIVE (VE), EFFECTIVE (E), NEITHER EFFECTIVE NOR INEFFECTIVE (NEI), INEFFECTIVE (I), and VERY INEFFECTIVE (VI). Rate the unit leader's effectiveness as NEITHER EFFECTIVE NOR INEFFECTIVE either if he does not presently perform a particular task or if you are not certain he performs it.

3. Please feel free to add appropriate items that are not presently included.

EXPECTATIONS					TASKS	EFFECTIVENESS				
AS UNIT LEADER I AM EXPECTED TO:						I RATE MY EFFECTIVENESS IN THIS TASK AS:				
AM	PS	MMN	PSN	AMN		VE	E	NEI	I	VI
___	___	___	___	___	1. Provide individual assistance to new and beginning unit teachers.	___	___	___	___	___
___	___	___	___	___	2. Assist unit teachers in the assessment and modification of student behavior patterns.	___	___	___	___	___

EXPECTATIONS					TASKS	EFFECTIVENESS				
AM	PS	MIN	PSN	AMN		VE	E	NEI	I	VI
—	—	—	—	—	3. Take initiative in maintaining unit staff morale at a high level.	—	—	—	—	—
—	—	—	—	—	4. Conduct inservice activities for paraprofessionals assigned to the unit.	—	—	—	—	—
—	—	—	—	—	5. Assume responsibility for completing routine reports.	—	—	—	—	—
—	—	—	—	—	6. Participate in developing the building plan for interns or student teachers.	—	—	—	—	—
—	—	—	—	—	7. Coordinate research activities within the unit.	—	—	—	—	—
—	—	—	—	—	8. Evaluate paraprofessionals assigned to the unit	—	—	—	—	—
—	—	—	—	—	9. Provide for appropriate briefing of observers to the unit.	—	—	—	—	—
—	—	—	—	—	10. Resolve interpersonal conflicts within the unit.	—	—	—	—	—
—	—	—	—	—	11. Schedule unit meetings for goal setting, problem solving and evaluation.	—	—	—	—	—

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EXPECTATIONS					TASKS	EFFECTIVENESS				
AM	PS	MIN	PSN	AMN		VE	E	NEI	I	VI
—	—	—	—	—	12. Provide unit staff with information regarding advances in subject matter and promising instructional materials.	—	—	—	—	—
—	—	—	—	—	13. Prepare and distribute an agenda prior to unit meetings.	—	—	—	—	—
—	—	—	—	—	14. Coordinate the utilization of paraprofessionals assigned to the unit.	—	—	—	—	—
—	—	—	—	—	15. Facilitate formal communication between the unit and the IIC.	—	—	—	—	—
—	—	—	—	—	16. Coordinate the use of specialized volunteer community personnel to assist in instruction.	—	—	—	—	—
—	—	—	—	—	17. Organize unit staff so that each member is engaged in appropriate planning, management and instructional activities.	—	—	—	—	—
—	—	—	—	—	18. Coordinate the development of the instructional budget for the unit.	—	—	—	—	—
—	—	—	—	—	19. Direct the maintenance of systematic instructional record keeping for monitoring student progress.	—	—	—	—	—

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UNIT LEADER R[illegible]ALYSIS (ULRA)

(Form P-T)

This instrument contains task statements which are descriptive of expectations you may hold for the unit leader in conducting unit functions. Your expectations will indicate the behavior you expect of a unit leader in conducting unit functions in your school. Please react to each statement as follows:

1. To the left of each statement indicate the nature of the expectation you hold for the unit leader in your school to perform each of the identified tasks by checking the appropriate response. Choices include: ABSOLUTELY MUST (AM), PROBABLY SHOULD (PS), MAY OR MAY NOT (MMN), PROBABLY SHOULD NOT (PSN), and ABSOLUTELY MUST NOT (AMN).

2. To the right of each statement rate the effectiveness of the unit leader in performing each task. Choices for effectiveness ratings include: VERY EFFECTIVE (VE), EFFECTIVE (E), NEITHER EFFECTIVE NOR INEFFECTIVE (NEI), INEFFECTIVE (I), and VERY INEFFECTIVE (VI). Rate the unit leader's effectiveness as NEITHER EFFECTIVE NOR INEFFECTIVE either if he does not presently perform a particular task or if you are not certain he performs it.

3. Please feel free to add appropriate items that are not presently included.

EXPECTATIONS					TASKS	EFFECTIVENESS				
I EXPECT THE UNIT LEADER TO:						I RATE THE EFFECTIVENESS OF THE UNIT LEADER IN THIS TASK AS:				
AM	PS	MMN	PSN	AMN		VE	E	NEI	I	VI
___	___	___	___	___	1. Provide individual assistance to new and beginning unit teachers.	___	___	___	___	___
___	___	___	___	___	2. Assist unit teachers in the assessment and modification of student behavior patterns.	___	___	___	___	___
___	___	___	___	___	3. Take initiative in maintaining unit staff morale at a high level.	___	___	___	___	___
___	___	___	___	___	4. Conduct inservice activities for paraprofessionals assigned to the unit.	___	___	___	___	___
___	___	___	___	___	5. Assume responsibility for completing routine reports.	___	___	___	___	___
___	___	___	___	___	6. Participate in developing the building plan for interns or student teachers.	___	___	___	___	___
___	___	___	___	___	7. Coordinate research activities within the unit.	___	___	___	___	___
___	___	___	___	___	8. Evaluate paraprofessionals assigned to the unit.	___	___	___	___	___
___	___	___	___	___	9. Provide for appropriate briefing of observers to the unit.	___	___	___	___	___
___	___	___	___	___	10. Resolve interpersonal conflicts within the unit.	___	___	___	___	___
___	___	___	___	___	11. Schedule unit meetings for goal setting, problem solving and evaluation.	___	___	___	___	___

EXPECTATIONS					TASKS	EFFECTIVENESS				
AM	PS	MMN	PSN	AMN		VE	E	NEI	I	VI
___	___	___	___	___	12. Provide unit staff with information regarding advances in subject matter and promising instructional materials.	___	___	___	___	___
___	___	___	___	___	13. Prepare and distribute an agenda prior to unit meetings.	___	___	___	___	___
___	___	___	___	___	14. Coordinate the utilization of paraprofessionals assigned to the unit.	___	___	___	___	___
___	___	___	___	___	15. Facilitate formal communication between the unit and the IIC.	___	___	___	___	___
___	___	___	___	___	16. Coordinate the use of specialized volunteer community personnel to assist in instruction.	___	___	___	___	___
___	___	___	___	___	17. Organize unit staff so that each member is engaged in appropriate planning, management and instructional activities.	___	___	___	___	___
___	___	___	___	___	18. Coordinate the development of the instructional budget for the unit.	___	___	___	___	___
___	___	___	___	___	19. Direct the maintenance of systematic instructional record keeping for monitoring student progress.	___	___	___	___	___

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EXPECTATIONS					TASKS	EFFECTIVENESS				
AM	PS	MMN	PSN	AMN		VE	E	NEI	I	VI
___	___	___	___	___	20. Teach or be directly involved with children at least 1/2 time.	___	___	___	___	___
___	___	___	___	___	21. Assist in evaluating the achievement of schoolwide objectives.	___	___	___	___	___
___	___	___	___	___	22. Plan with appropriate personnel the research activities for the unit.	___	___	___	___	___
___	___	___	___	___	23. Keep abreast of advances in IGE through visits, conferences, and meetings.	___	___	___	___	___
___	___	___	___	___	24. Attend all meetings of the IIC.	___	___	___	___	___
___	___	___	___	___	25. Recommend the curricular areas to be incorporated into the IGE model within the unit.	___	___	___	___	___
___	___	___	___	___	26. Encourage parents to attend unit meetings or observe in the school.	___	___	___	___	___
___	___	___	___	___	27. Hold the unit staff accountable for student achievement.	___	___	___	___	___
___	___	___	___	___	28. Seek the advice and counsel of the principal in handling special unit problems.	___	___	___	___	___

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EXPECTATIONS					TASKS	EFFECTIVENESS				
AM	PS	MMN	PSN	AMN		VE	E	NEI	I	VI
					29. Facilitate communication between central office personnel, consultants, and unit staff.					
					30. Coordinate the activities of special teachers in the unit.					
					31. Recommend special resources and personnel needed to accomplish the unit's instructional task.					
					32. Meet informally with parents to discuss the unit's instructional program.					
					33. Cooperate with IIC members in coordinating schoolwide facilities and resources.					
					34. Coordinate the placement and supervision of student teachers or interns in the unit.					
					35. Provide information to othe. units and schools regarding promising practices.					
					36. Assist in collecting, evaluating, and interpreting data needed for instructional improvement.					

EXPECTATIONS					TASKS	EFFECTIVENESS				
AM	PS	MMN	PSN	AMN		VE	E	NEI	I	VI
					37. Establish workloads that utilize the special interests and abilities of all unit staff.					
					38. Confer informally with unit staff members to discuss ways of improving instruction.					
					39. Channel information from a variety of sources to unit teachers.					
					40. Orient unit teachers to school and district policies and procedures.					
					41. Observe on request the instructional presentations of unit staff and provide feedback aimed at improving instruction.					
					42. Conduct demonstration lessons for unit staff members using new materials and procedures.					
					43. Participate in the formulation of policies for implementing instructional improvement in the schoolwide ISE program.					

EXPECTATIONS					TASKS	EFFECTIVENESS				
AM	PS	MN	PSN	AMN		VE	E	NEI	I	VI
—	—	—	—	—	44. Make certain that each child is engaged in appropriate one-to-one, small group, class size or large group activities.	—	—	—	—	—
—	—	—	—	—	45. Facilitate formal communication between the unit staff and the principal.	—	—	—	—	—
—	—	—	—	—	46. Take the initiative in developing new instructional procedures within the unit.	—	—	—	—	—
—	—	—	—	—	47. Participate in developing the school's inservice teacher education program.	—	—	—	—	—
—	—	—	—	—	48. Alter unit plans and procedures when evaluation indicates such a need.	—	—	—	—	—
—	—	—	—	—	49. Participate in the selection of professional staff assigned to the unit.	—	—	—	—	—
—	—	—	—	—	50. Direct unit staff in selecting or preparing written behavioral objectives for each curricular area.	—	—	—	—	—

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EXPECTATIONS					TASKS	EFFECTIVENESS				
AM	PS	MN	PSN	AMN		VE	E	NEI	I	VI
—	—	—	—	—	51. Coordinate the assessment of children's characteristics prior to initial grouping.	—	—	—	—	—
—	—	—	—	—	52. Develop rules and regulations for the day-to-day operation of the unit.	—	—	—	—	—
—	—	—	—	—	53. Facilitate effective interaction between and among members of the unit.	—	—	—	—	—
—	—	—	—	—	54. Coordinate the assessment of students in the unit based on individual objectives.	—	—	—	—	—
—	—	—	—	—	55. Schedule and chair unit meetings.	—	—	—	—	—
—	—	—	—	—	56. Direct unit staff in writing or selecting instructional objectives for each student.	—	—	—	—	—
—	—	—	—	—	57. Establish with unit staff daily time schedules for instructional activities.	—	—	—	—	—
—	—	—	—	—	58. Provide for the utilization of consultants and resource personnel.	—	—	—	—	—
—	—	—	—	—	59. Assist unit teachers with instructional activities, materials, and procedures when requested.	—	—	—	—	—

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EXPECTATIONS					TASKS	EFFECTIVENESS				
AM	PS	MN	PSN	AMN		VE	E	NEI	I	VI
___	___	___	___	___	60. Secure unit staff compliance with established school regulations.	___	___	___	___	___
___	___	___	___	___	61. Schedule the use of special school facilities, equipment and materials needed by the unit.	___	___	___	___	___
___	___	___	___	___	62. Participate in establishing a system of reporting that involves teacher, parent and child.	___	___	___	___	___
___	___	___	___	___	63. Coordinate the initial and subsequent regrouping of students based on needs, interests, and attainment of objectives.	___	___	___	___	___
___	___	___	___	___	64. Participate in the selection of nonprofessional staff assigned to the unit.	___	___	___	___	___

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OVERALL EFFECTIVENESS

PLEASE INDICATE THE LEVEL OF THE UNIT LEADER'S OVERALL EFFECTIVENESS IN CONDUCTING UNIT FUNCTIONS. (Circle one)

A. The unit leader is VERY EFFECTIVE in conducting unit functions.

B. The unit leader is EFFECTIVE in conducting unit functions.

C. The unit leader is NEITHER EFFECTIVE NOR INEFFECTIVE in conducting unit functions.

D. The unit leader is INEFFECTIVE in conducting unit functions.

E. The unit leader is VERY INEFFECTIVE in conducting unit functions.

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GENERAL INFORMATION DATA SHEET

UNIT TEACHER

PLEASE FILL IN THE BLANKS WITH THE APPROPRIATE INFORMATION:

_____ 1. Date of Birth (Day-Month-Year)

_____ 2. Sex Male (M) Female (F)

_____ 3. Professional Training Level
Less than BA, BA, BA+15, MA, MA+16, MA+32

_____ 4. Total years of teaching experience.
(Do not include this year)

_____ 5. Total years of teaching experience in present district.
(Do not include this year)

_____ 6. Have you participated in a 5-day institute for experienced multi-unit personnel?

_____ 7. Have you participated in a workshop of 1-5 days duration for the entire building staff prior to starting out as a MUS-E?

_____ 8. Have you taken a course dealing with IGE/MUS-E on a college campus?

_____ 9. Have you participated in some other organized program or activity to become familiar with the Center's role descriptions for unit leaders? Describe briefly:

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APPENDIX C

UNIT LEADER ROLE ANALYSIS QUESTIONNAIRE

UNIT LEADER ROLE ANALYSIS (ULRA)
(Form UL)

This instrument contains task statements which are descriptive of expectations you may hold for the unit leader in conducting unit functions. Your expectations will indicate the behavior you expect of a unit leader in conducting unit functions in your school. Please react to each statement as follows:

1. To the left of each statement indicate how important you feel it is for the unit leader in your school to perform each of the identified tasks by checking the appropriate response. Choices include: ABSOLUTELY MUST (AM), PROBABLY SHOULD (PS), MAY OR MAY NOT (MMN), PROBABLY SHOULD NOT (PSN), and ABSOLUTELY MUST NOT (AMN).

2. To the right of each statement rate the effectiveness of the unit leader in performing each task. Choices for effectiveness ratings include: VERY EFFECTIVE (VE), EFFECTIVE (E), NEITHER EFFECTIVE NOR INEFFECTIVE (NEI), INEFFECTIVE (I), and VERY INEFFECTIVE (VI). Please rate the unit leader as NEITHER EFFECTIVE NOR INEFFECTIVE for those tasks which the unit leader does not perform in your school.

EXPECTATIONS					TASKS	EFFECTIVENESS				
AS UNIT LEADER I AM EXPECTED TO:						I RATE MY EFFECTIVENESS IN THIS TASK AS:				
AM	PS	MMN	PSN	AMN		VE	E	NEI	I	VI
___	___	___	___	___	1. Evaluate paraprofessionals assigned to the unit.	___	___	___	___	___
___	___	___	___	___	2. Attend all meetings of the IIC.	___	___	___	___	___
___	___	___	___	___	3. Schedule and chair unit meetings.	___	___	___	___	___
___	___	___	___	___	4. Resolve interpersonal conflicts within the unit.	___	___	___	___	___

EXPECTATIONS					TASKS	EFFECTIVENESS				
AM	PS	MN	PSN	AMN		VE	E	NEI	I	VI
___	___	___	___	___	5. Channel information from a variety of sources to unit teachers.	___	___	___	___	___
___	___	___	___	___	6. Conduct demonstration lessons for unit staff members using new materials and procedures.	___	___	___	___	___
___	___	___	___	___	7. Meet informally with parents to discuss the unit's instructional program.	___	___	___	___	___
___	___	___	___	___	8. Coordinate the assessment of students in the unit based on individual objectives.	___	___	___	___	___
___	___	___	___	___	9. Plan with appropriate personnel the research activities for the unit.	___	___	___	___	___
___	___	___	___	___	10. Schedule unit meetings for goal setting, problem solving, and evaluation.	___	___	___	___	___
___	___	___	___	___	11. Coordinate the assessment of children's characteristics prior to grouping.	___	___	___	___	___
___	___	___	___	___	12. Recommend the curricular areas to be incorporated into the IGE model within the unit.	___	___	___	___	___

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EXPECTATIONS					TASKS	EFFECTIVENESS				
AM	PS	MN	PSN	AMN		VE	E	NEI	I	VI
___	___	___	___	___	13. Cooperate with IIC members in coordinating schoolwide facilities and resources.	___	___	___	___	___
___	___	___	___	___	14. Provide for the utilization of consultants and resource personnel.	___	___	___	___	___
___	___	___	___	___	15. Coordinate the use of specialized volunteer community personnel to assist in instruction.	___	___	___	___	___
___	___	___	___	___	16. Schedule the use of special school facilities, equipment and materials needed by the unit.	___	___	___	___	___
___	___	___	___	___	17. Encourage parents to attend unit meetings or observe in the school.	___	___	___	___	___
___	___	___	___	___	18. Facilitate effective interaction between and among members of the unit.	___	___	___	___	___
___	___	___	___	___	19. Assist in collecting, evaluating, and interpreting data needed for instructional improvement.	___	___	___	___	___
___	___	___	___	___	20. Confer informally with unit staff members to discuss ways of improving instruction.	___	___	___	___	___

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EXPECTATIONS					TASKS	EFFECTIVENESS				
AM	PS	MMN	PSN	AMN		VE	E	NEI	I	VI
___	___	___	___	___	21. Facilitate communication between central office personnel, consultants, and unit staff.	___	___	___	___	___
___	___	___	___	___	22. Participate in the selection of professional staff assigned to the unit.	___	___	___	___	___
___	___	___	___	___	23. Provide for appropriate briefing of observers to the unit.	___	___	___	___	___
___	___	___	___	___	24. Coordinate the development of the instructional budget for the unit.	___	___	___	___	___
___	___	___	___	___	25. Provide unit staff with information regarding advances in subject matter and promising instructional materials.	___	___	___	___	___
___	___	___	___	___	26. Coordinate the placement and supervision of student teachers or interns in the unit.	___	___	___	___	___
___	___	___	___	___	27. Provide information to other units regarding promising practices.	___	___	___	___	___
___	___	___	___	___	28. Establish workloads that utilize the special interests and abilities of all unit staff.	___	___	___	___	___

EXPECTATIONS					TASKS	EFFECTIVENESS				
AM	PS	MMN	PSN	AMN		VE	E	NEI	I	VI
___	___	___	___	___	29. Establish with unit staff daily time schedules for instructional activities.	___	___	___	___	___
___	___	___	___	___	30. Alter unit plans and procedures when evaluation indicates such a need.	___	___	___	___	___
___	___	___	___	___	31. Participate in the formulation of policies for implementing instructional improvement in the school-wide IGE program.	___	___	___	___	___
___	___	___	___	___	32. Organize unit staff so that each member is engaged in appropriate planning, management and instructional activities.	___	___	___	___	___
___	___	___	___	___	33. Take initiative in maintaining unit staff morale at a high level.	___	___	___	___	___
___	___	___	___	___	34. Conduct inservice activities for paraprofessionals assigned to the unit.	___	___	___	___	___
___	___	___	___	___	35. Participate in the selection of nonprofessional staff assigned to the unit.	___	___	___	___	___

EXPECTATIONS					TASKS	EFFECTIVENESS				
AH	PS	MOD	PSN	AMN		VE	E	NEI	I	VI
—	—	—	—	—	36. Recommend special resources and personnel needed to accomplish the unit's instructional task.	—	—	—	—	—
—	—	—	—	—	37. Facilitate formal communication between the unit and the IIC.	—	—	—	—	—
—	—	—	—	—	38. Take the initiative in developing new instructional procedures within the unit.	—	—	—	—	—
—	—	—	—	—	39. Direct unit staff in selecting or preparing written behavioral objectives for each curricular area.	—	—	—	—	—
—	—	—	—	—	40. Seek the advice and counsel of the principal in handling special unit problems.	—	—	—	—	—
—	—	—	—	—	41. Facilitate formal communication between the unit staff and the principal.	—	—	—	—	—
—	—	—	—	—	42. Make certain that each child is engaged in appropriate one-to-one, small group, class size or large group activities.	—	—	—	—	—
—	—	—	—	—	43. Participate in establishing a system of reporting that involves teacher, parent and child.	—	—	—	—	—

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EXPECTATIONS					TASKS	EFFECTIVENESS				
AH	PS	MOD	PSN	AMN		VE	E	NEI	I	VI
—	—	—	—	—	44. Direct the maintenance of systematic instructional record keeping for monitoring student progress.	—	—	—	—	—
—	—	—	—	—	45. Assure responsibility for completing routine reports.	—	—	—	—	—
—	—	—	—	—	46. Keep abreast of advances in IQE through visits, conferences, and meetings.	—	—	—	—	—
—	—	—	—	—	47. Coordinate the utilization of paraprofessionals assigned to the unit.	—	—	—	—	—
—	—	—	—	—	48. Participate in developing the school's inservice teacher education program.	—	—	—	—	—
—	—	—	—	—	49. Observe on request the instructional presentations of unit staff and provide feedback aimed at improving instruction.	—	—	—	—	—
—	—	—	—	—	50 Coordinate research activities within the unit.	—	—	—	—	—
—	—	—	—	—	51. Provide individual assistance to new and beginning unit teachers.	—	—	—	—	—
—	—	—	—	—	52. Hold the unit staff accountable for student achievement.	—	—	—	—	—

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EXPECTATIONS					TASKS	EFFECTIVENESS				
AM	PS	SNS	PSN	AMN		VE	E	NEI	I	VI
___	___	___	___	___	53. Assist unit teachers in the assessment and modification of student behavior patterns.	___	___	___	___	___
___	___	___	___	___	54. Coordinate the activities of special teachers in the unit.	___	___	___	___	___
___	___	___	___	___	55. Participate in developing the building plan for interns or student teachers.	___	___	___	___	___
___	___	___	___	___	56. Direct unit staff in writing or selecting instructional objectives for each student.	___	___	___	___	___

OVERALL EFFECTIVENESS

PLEASE INDICATE THE LEVEL OF THE [illegible]'S OVERALL EFFECTIVENESS IN CONDUCTING UNIT FUNCTIONS.

A. The unit leader is VERY EFFECTIVE in conducting unit functions.

B. The unit leader is EFFECTIVE in conducting unit functions.

C. The unit leader is NEITHER EFFECTIVE NOR INEFFECTIVE in conducting unit functions.

D. The unit leader is INEFFECTIVE in conducting unit functions.

E. The unit leader is VERY INEFFECTIVE in conducting unit functions.

GENERAL INFORMATION DATA

UNIT LEADER

PLEASE FILL IN THE BLANKS WITH THE APPROPRIATE INFORMATION

1. Professional Training Level
   Less than BA, BS, MA, MS, PhD, EdD

2. Total years of teaching experience
   (Include this year)

3. Total years of teaching experience at present grade level
   (Include this year)

4. Have you participated in a Study Retreat for Unit Leaders?

5. Did you participate in a 5-day workshop for Unit Leaders Effectiveness and Team Teaching held in Tallahassee in May?

6. Have you participated in a workshop of the Florida Study Council for Teaching and Learning?

7. Have you taken a course dealing with Team Teaching?

8. Have you participated in the [illegible] to become [illegible]

UNIT LEADER ROLE ANALYSIS (ULRA)
(Form T)

This instrument contains task statements which are descriptive of expectations you may hold for the unit leader in conducting unit functions. Your expectations will indicate the behavior you expect of a unit leader in conducting unit functions in your school. Please react to each statement as follows:

1. To the left of each statement indicate how important you feel it is for the unit leader in your school to perform each of the identified tasks by checking the appropriate response. Choices include: ABSOLUTELY MUST (AM), PROBABLY SHOULD (PS), MAY OR MAY NOT (MMN), PROBABLY SHOULD NOT (PSN), and ABSOLUTELY MUST NOT (AMN).

2. To the right of each statement rate the effectiveness of the unit leader in performing each task. Choices for effectiveness ratings include: VERY EFFECTIVE (VE), EFFECTIVE (E), NEITHER EFFECTIVE NOR INEFFECTIVE (NEI), INEFFECTIVE (I), and VERY INEFFECTIVE (VI). Please rate the unit leader as NEITHER EFFECTIVE NOR INEFFECTIVE for those tasks which the unit leader does not perform in your school.

EXPECTATIONS I EXPECT THE UNIT LEADER TO:					TASKS	EFFECTIVENESS I RATE THE EFFECTIVENESS OF THE UNIT LEADER IN THIS TASK AS:				
AM	PS	MMN	PSN	AMN		VE	E	NEI	I	VI
___	___	___	___	___	1. Evaluate paraprofessionals assigned to the unit.	___	___	___	___	___
___	___	___	___	___	2. Attend all meetings of the IIC.	___	___	___	___	___
___	___	___	___	___	3. Schedule and chair unit meetings.	___	___	___	___	___
___	___	___	___	___	4. Resolve interpersonal conflicts within the unit.	___	___	___	___	___
___	___	___	___	___	5. Channel information from a variety of sources to unit teachers.	___	___	___	___	___
___	___	___	___	___	6. Conduct demonstration lessons for unit staff members using new materials and procedures.	___	___	___	___	___
___	___	___	___	___	7. Meet informally with parents to discuss the unit's instructional program.	___	___	___	___	___
___	___	___	___	___	8. Coordinate the assessment of students in the unit based on individual objectives.	___	___	___	___	___
___	___	___	___	___	9. Plan with appropriate personnel the research activities for the unit.	___	___	___	___	___
___	___	___	___	___	10. Schedule unit meetings for goal setting, problem solving and evaluation.	___	___	___	___	___
___	___	___	___	___	11. Coordinate the assessment of children's characteristics prior to grouping.	___	___	___	___	___
___	___	___	___	___	12. Recommend the curricular areas to be incorporated into the IGE model within the unit.	___	___	___	___	___
___	___	___	___	___	13. Cooperate with IIC members in coordinating schoolwide facilities and resources.	___	___	___	___	___

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EXPECTATIONS					TASKS	EFFECTIVENESS				
AM	PS	MMN	PSN	AMN		VE	E	NEI	I	VI
___	___	___	___	___	14. Provide for the utilization of consultants and resource personnel.	___	___	___	___	___
___	___	___	___	___	15. Coordinate the use of specialized volunteer community personnel to assist in instruction.	___	___	___	___	___
___	___	___	___	___	16. Schedule the use of special school facilities, equipment and materials needed by the unit.	___	___	___	___	___
___	___	___	___	___	17. Encourage parents to attend unit meetings or observe in the school.	___	___	___	___	___
___	___	___	___	___	18. Facilitate effective interaction between and among members of the unit.	___	___	___	___	___
___	___	___	___	___	19. Assist in collecting, evaluating, and interpreting data needed for instructional improvement.	___	___	___	___	___
___	___	___	___	___	20. Confer informally with unit staff members to discuss ways of improving instruction.	___	___	___	___	___
___	___	___	___	___	21. Facilitate communication between central office personnel, consultants, and unit staff.	___	___	___	___	___

EXPECTATIONS					TASKS	EFFECTIVENESS				
AM	PS	MMN	PSN	AMN		VE	E	NEI	I	VI
___	___	___	___	___	22. Participate in the selection of professional staff assigned to the unit.	___	___	___	___	___
___	___	___	___	___	23. Provide for appropriate briefing of observers to the unit.	___	___	___	___	___
___	___	___	___	___	24. Coordinate the development of the instructional budget for the unit.	___	___	___	___	___
___	___	___	___	___	25. Provide unit staff with information regarding advances in subject matter and promising instructional materials.	___	___	___	___	___
___	___	___	___	___	26. Coordinate the placement and supervision of student teachers or interns in the unit.	___	___	___	___	___
___	___	___	___	___	27. Provide information to other units regarding promising practices.	___	___	___	___	___
___	___	___	___	___	28. Establish workloads that utilize the special interests and abilities of all unit staff.	___	___	___	___	___
___	___	___	___	___	29. Establish with unit staff daily time schedules for instructional activities.	___	___	___	___	___
___	___	___	___	___	30. Alter unit plans and procedures when evaluation indicates such a need.	___	___	___	___	___
___	___	___	___	___	31. Participate in the formulation of policies for implementing instructional improvement in the school-wide IGE program.	___	___	___	___	___

EXPECTATIONS					TASKS	EFFECTIVENESS				
AM	PS	MMN	PSN	AMN		VE	E	NEI	I	VI
___	___	___	___	___	32. Organize unit staff so that each member is engaged in appropriate planning, management and instructional activities.	___	___	___	___	___
___	___	___	___	___	33. Take initiative in maintaining unit staff morale at a high level.	___	___	___	___	___
___	___	___	___	___	34. Conduct inservice activities for paraprofessionals assigned to the unit.	___	___	___	___	___
___	___	___	___	___	35. Participate in the selection of nonprofessional staff assigned to the unit.	___	___	___	___	___
___	___	___	___	___	36. Recommend special resources and personnel needed to accomplish the unit's instructional task.	___	___	___	___	___
___	___	___	___	___	37. Facilitate formal communication between the unit and the IIC.	___	___	___	___	___
___	___	___	___	___	38. Take the initiative in developing new instructional procedures within the unit.	___	___	___	___	___
___	___	___	___	___	39. Direct unit staff in selecting or preparing written behavioral objectives for each curricular area.	___	___	___	___	___

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EXPECTATIONS					TASKS	EFFECTIVENESS				
AM	PS	MMN	PSN	AMN		VE	E	NEI	I	VI
___	___	___	___	___	40. Seek the advice and counsel of the principal in handling special unit problems.	___	___	___	___	___
___	___	___	___	___	41. Facilitate formal communication between the unit staff and the principal.	___	___	___	___	___
___	___	___	___	___	42. Make certain that each child is engaged in appropriate one-to-one, small group, class size or large group activities.	___	___	___	___	___
___	___	___	___	___	43. Participate in establishing a system or reporting that involves teacher, parent and child.	___	___	___	___	___
___	___	___	___	___	44. Direct the maintenance of systematic instructional record keeping for monitoring student progress.	___	___	___	___	___
___	___	___	___	___	45. Assume responsibility for completing routine reports.	___	___	___	___	___
___	___	___	___	___	46. Keep abreast of advances in IGE through visits, conferences, and meetings.	___	___	___	___	___
___	___	___	___	___	47. Coordinate the utilization of paraprofessionals assigned to the unit.	___	___	___	___	___

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TASKS	EFFECTIVENESS					EXPECTATIONS				
	VE	E	NEI	I	VI	AM	PS	MN	PSN	AMN
48. Participate in developing the school's inservice teacher education program.										
49. Observe on request the instructional presentations of unit staff and provide feedback aimed at improving instruction.										
50. Coordinate research activities within the unit.										
51. Provide individual assistance to new and beginning unit teachers.										
52. Hold the unit staff accountable for student achievement.										
53. Assist unit teachers in the assessment and modification of student behavior patterns.										
54. Coordinate the activities of special teachers in the unit.										
55. Participate in developing the building plan for interns or student teachers.										
56. Direct unit staff in writing or selecting instructional objectives for each student.										

OVERALL EFFECTIVENESS

PLEASE INDICATE THE LEVEL OF THE UNIT LEADER'S OVERALL EFFECTIVENESS IN CONDUCTING UNIT FUNCTIONS. (Circle one)

A. The unit leader is VERY EFFECTIVE in conducting unit functions.

B. The unit leader is EFFECTIVE in conducting unit functions.

C. The unit leader is NEITHER EFFECTIVE NOR INEFFECTIVE in conducting unit functions.

D. The unit leader is INEFFECTIVE in conducting unit functions.

E. The unit leader is VERY INEFFECTIVE in conducting unit functions.

GENERAL INFORMATION DATA

UNIT TEACHER

PLEASE FILL IN THE BLANKS WITH THE APPROPRIATE INFORMATION:

1. Professional Training Level
   Less than BA, BA, BA+15, MA, MA+16, MA+32
2. Total years of teaching experience.
   (Include this year)
3. Total years of teaching experience in present district.
   (Include this year)
4. Have you participated in a 5-day institute for experienced multi-unit personnel?
5. Have you participated in a workshop of 1-5 days duration for the entire building staff prior to starting out as a MDS-E?
6. Have you taken a course dealing with IGE/MDS-E on a college campus?
7. Have you participated in some other organized program or activity to become familiar with the Center's role descriptions for unit leaders? Describe briefly:

UNIT LEADER ROLE ANALYSIS (ULRA)
(Form P)

This instrument contains task statements which are descriptive of expectations you may hold for the unit leader in conducting unit functions. Your expectations will indicate the behavior you expect of a unit leader in conducting unit functions in your school. Please react to each statement as follows:

1. To the left of each statement indicate how important you feel it is for the unit leader in your school to perform each of the identified tasks by checking the appropriate response. Choices include: ABSOLUTELY MUST (AM), PROBABLY SHOULD (PS), MAY OR MAY NOT (MMN), PROBABLY SHOULD NOT (PSN), and ABSOLUTELY MUST NOT (AMN).

2. To the right of each statement rate the effectiveness of the unit leader in performing each task. Choices for effectiveness ratings include: VERY EFFECTIVE (VE), EFFECTIVE (E), NEITHER EFFECTIVE NOR INEFFECTIVE (NEI), INEFFECTIVE (I), and VERY INEFFECTIVE (VI). Please rate the unit leader as NEITHER EFFECTIVE NOR INEFFECTIVE for those tasks which the unit leader does not perform in your school.

EXPECTATIONS I EXPECT THE UNIT LEADER TO:					TASKS	EFFECTIVENESS I RATE THE EFFECTIVENESS OF THE UNIT LEADER IN THIS TASK AS:				
AM	PS	MMN	PSN	AMN		VE	E	NEI	I	VI
___	___	___	___	___	1. Evaluate paraprofessionals assigned to the unit.	___	___	___	___	___
___	___	___	___	___	2. Attend all meetings of the IIC.	___	___	___	___	___
___	___	___	___	___	3. Schedule and chair unit meetings.	___	___	___	___	___

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4

EXPECTATIONS					TASKS	EFFECTIVENESS				
AM	PS	MMN	PSN	AMN		VE	E	NEI	I	VI
___	___	___	___	___	4. Resolve interpersonal conflicts within the unit.	___	___	___	___	___
___	___	___	___	___	5. Channel information from a variety of sources to unit teachers.	___	___	___	___	___
___	___	___	___	___	6. Conduct demonstration lessons for unit staff members using new materials and procedures.	___	___	___	___	___
___	___	___	___	___	7. Meet informally with parents to discuss the unit's instructional program.	___	___	___	___	___
___	___	___	___	___	8. Coordinate the assessment of students in the unit based on individual objectives.	___	___	___	___	___
___	___	___	___	___	9. Plan with appropriate personnel the research activities for the unit.	___	___	___	___	___
___	___	___	___	___	10. Schedule unit meetings for goal setting, problem solving and evaluation.	___	___	___	___	___
___	___	___	___	___	11. Coordinate the assessment of children's characteristics prior to grouping.	___	___	___	___	___

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EXPECTATIONS					TASKS	EFFECTIVENESS				
AM	PS	MMN	PSN	AMN		VE	E	NEI	I	VI
—	—	—	—	—	12. Recommend the curricular areas to be incorporated into the IGE model within the unit.	—	—	—	—	—
—	—	—	—	—	13. Cooperate with IIC members in coordinating schoolwide facilities and resources.	—	—	—	—	—
—	—	—	—	—	14. Provide for the utilization of consultants and resource personnel.	—	—	—	—	—
—	—	—	—	—	15. Coordinate the use of specialized volunteer community personnel to assist in instruction.	—	—	—	—	—
—	—	—	—	—	16. Schedule the use of special school facilities, equipment and materials needed by the unit.	—	—	—	—	—
—	—	—	—	—	17. Encourage parents to attend unit meetings or observe in the school.	—	—	—	—	—
—	—	—	—	—	18. Facilitate effective interaction between and among members of the unit.	—	—	—	—	—
—	—	—	—	—	19. Assist in collecting, evaluating, and interpreting data needed for instructional improvement.	—	—	—	—	—

EXPECTATIONS					TASKS	EFFECTIVENESS				
AM	PS	MMN	PSN	AMN		VE	E	NEI	I	VI
—	—	—	—	—	20. Confer informally with unit staff members to discuss ways of improving instruction.	—	—	—	—	—
—	—	—	—	—	21. Facilitate communication between central office personnel, consultants, and unit staff.	—	—	—	—	—
—	—	—	—	—	22. Participate in the selection of professional staff assigned to the unit.	—	—	—	—	—
—	—	—	—	—	23. Provide for appropriate briefing of observers to the unit.	—	—	—	—	—
—	—	—	—	—	24. Coordinate the development of the instructional budget for the unit.	—	—	—	—	—
—	—	—	—	—	25. Provide unit staff with information regarding advances in subject matter and promising instructional materials.	—	—	—	—	—
—	—	—	—	—	26. Coordinate the placement and supervision of student teachers or interns in the unit.	—	—	—	—	—
—	—	—	—	—	27. Provide information to other units regarding promising practices.	—	—	—	—	—
—	—	—	—	—	28. Establish workloads that utilize the special interests and abilities of all unit staff.	—	—	—	—	—

EXPECTATIONS					TASKS	EFFECTIVENESS				
AM	PS	MMN	PSN	AMN		VE	E	NEI	I	VI
—	—	—	—	—	29. Establish with unit staff daily time schedules for instructional activities.	—	—	—	—	—
—	—	—	—	—	30. Alter unit plans and procedures when evaluation indicates such a need.	—	—	—	—	—
—	—	—	—	—	31. Participate in the formulation of policies for implementing instructional improvement in the school-wide IGE program.	—	—	—	—	—
—	—	—	—	—	32. Organize unit staff so that each member is engaged in appropriate planning, management and instructional activities.	—	—	—	—	—
—	—	—	—	—	33. Take initiative in maintaining unit staff morale at a high level.	—	—	—	—	—
—	—	—	—	—	34. Conduct inservice activities for paraprofessionals assigned to the unit.	—	—	—	—	—
—	—	—	—	—	35. Participate in the selection of nonprofessional staff assigned to the unit.	—	—	—	—	—
—	—	—	—	—	36. Recommend special resources and personnel needed to accomplish the unit's instructional task.	—	—	—	—	—

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EXPECTATIONS					TASKS	EFFECTIVENESS				
AM	PS	MMN	PSN	AMN		VE	E	NEI	I	VI
—	—	—	—	—	37. Facilitate formal communication between the unit and the IIC.	—	—	—	—	—
—	—	—	—	—	38. Take the initiative in developing new instructional procedures within the unit.	—	—	—	—	—
—	—	—	—	—	39. Direct unit staff in selecting or preparing written behavioral objectives for each curricular area.	—	—	—	—	—
—	—	—	—	—	40. Seek the advice and counsel of the principal in handling special unit problems.	—	—	—	—	—
—	—	—	—	—	41. Facilitate formal communication between the unit staff and the principal.	—	—	—	—	—
—	—	—	—	—	42. Make certain that each child is engaged in appropriate one-to-one, small group, class size or large group activities.	—	—	—	—	—
—	—	—	—	—	43. Participate in establishing a system of reporting that involves teacher, parent and child.	—	—	—	—	—
—	—	—	—	—	44. Direct the maintenance of systematic instructional record keeping for monitoring student progress.	—	—	—	—	—

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EXPECTATIONS					TASKS	EFFECTIVENESS				
AM	PS	MMN	PSN	AMN		VE	E	NEI	I	VI
—	—	—	—	—	45. Assume responsibility for completing routine reports.	—	—	—	—	—
—	—	—	—	—	46. Keep abreast of advances in IGE through visits, conferences, and meetings.	—	—	—	—	—
—	—	—	—	—	47. Coordinate the utilization of paraprofessionals assigned to the unit.	—	—	—	—	—
—	—	—	—	—	48. Participate in developing the school's inservice teacher education program.	—	—	—	—	—
—	—	—	—	—	49. Observe on request the instructional presentations of unit staff and provide feedback aimed at improving instruction.	—	—	—	—	—
—	—	—	—	—	50. Coordinate research activities within the unit.	—	—	—	—	—
—	—	—	—	—	51. Provide individual assistance to new and beginning unit teachers.	—	—	—	—	—
—	—	—	—	—	52. Hold the unit staff accountable for student achievement.	—	—	—	—	—
—	—	—	—	—	53. Assist unit teachers in the assessment and modification of student behavior patterns.	—	—	—	—	—

EXPECTATIONS					TASKS	EFFECTIVENESS				
AM	PS	MMN	PSN	AMN		VE	E	NEI	I	VI
—	—	—	—	—	54. Coordinate the activities of special teachers in the unit.	—	—	—	—	—
—	—	—	—	—	55. Participate in developing the building plan for interns or student teachers.	—	—	—	—	—
—	—	—	—	—	56. Direct unit staff in writing or selecting instructional objectives for each student.	—	—	—	—	—

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OVERALL EFFECTIVENESS

PLEASE INDICATE THE LEVEL OF THE UNIT LEADER'S OVERALL EFFECTIVENESS IN CONDUCTING UNIT FUNCTIONS. (Circle one)

A. The unit leader is VERY EFFECTIVE in conducting unit functions.

B. The unit leader is EFFECTIVE in conducting unit functions.

C. The unit leader is NEITHER EFFECTIVE NOR INEFFECTIVE in conducting unit functions.

D. The unit leader is INEFFECTIVE in conducting unit functions.

E. The unit leader is VERY INEFFECTIVE in conducting unit functions.

GENERAL INFORMATION DATA

PRINCIPAL

PLEASE FILL IN THE BLANKS WITH THE APPROPRIATE INFORMATION:

_____ 1. Professional Training Level
BA, BA+15, MA, MA+15, MA+32, Ph.D.

_____ 2. Total years of administrative experience.
(Include this year)

_____ 3. Total years as principal in present district.
(Include this year)

_____ 4. Have you participated in a 5-day institute for experienced multi-unit personnel?

_____ 5. Have you participated in a 3-day workshop for building principals and unit leaders prior to starting out as a MUS-E?

_____ 6. Have you participated in a workshop of 1-5 days duration for the entire building staff prior to starting out as a MUS-E?

_____ 7. Have you taken a course dealing with IGE/MUS-E on a college campus?

_____ 8. Have you participated in some other organized program or activity to become familiar with the Center's role descriptions for unit leaders? Describe briefly:

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APPENDIX D

CORRESPONDENCE RELATED TO DATA COLLECTION

June, 1972

Dear Colleague:

I am presently preparing a dissertation proposal which will be implemented during the 72-73 academic year. As a practicing school superintendent I am seriously interested in doing some research that shows promise of providing direction in the solution of a problem that we as administrators must deal with daily.

It seems to me that the emerging role of the unit leader in a multi-unit elementary school is in need of analysis. Further, it seems that the unit leader role needs clearer identity if it is to realize its instructional potential.

For the reasons outlined, I propose to study the role of the unit leader from the viewpoints of teachers, principals, and unit leaders in attempting to provide direction for a way the unit leader can meet both his/her personal needs and those of the school.

The sample selected for the study consists of all schools that began I.G.E. in the 1971-72 school year, thus your school is included in the sample. Data for the study will be collected in October or November of this year. At that time you and your unit leaders will be asked to respond to a questionnaire. At the present time I am merely informing you of the study and soliciting your cooperation. May I trouble you to complete the enclosed post card indicating your willingness to participate and return it to me by July 1st? This will make it possible for me to plan my sample.

Sincerely,

Terrance J. Sheridan

TJS:FKS
Enclosure

UNIT LEADER STUDY

School_____

Principal in 72-73 _____

We will be willing to participate in the study

_____ Yes _____ No

Suggestions or comments:

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UNIVERSITY OF WISCONSIN-MADISON
Department of Educational Administration

December, 1972

Dear Colleague:

The attached questionnaire contains statements which are descriptive of expectations you may have for the unit leader in conducting unit functions. It is part of a research study designed to gain insights into the role of the unit leader.

Participation of your school in this study has been authorized. All responses will remain confidential. No school or individual will be identified in any report of the study. We realize that your time is valuable, therefore we have developed a questionnaire which can be completed in approximately 15 minutes, yet measures all the items which are important to the study. After completing the questionnaire, seal it in the stamped self-addressed envelope provided and return it to us.

Thank you for your cooperation. Your perceptions are vital to the study. We look forward to receiving your completed questionnaire by December 15, 1972. A summary of findings and conclusions will be sent to each participating school upon completion of the study.

Sincerely,

Terrance J. Sheridan, Researcher
Educational Administration
University of Wisconsin
Madison, Wisconsin 53706
(608) 263-3689

James M. Lipham, Professor
Educational Administration
University of Wisconsin
Madison, Wisconsin 53706
(608) 263-2713

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APPENDIX E

TSTAT RESULTS - EFFECTIVENESS SCALES

COEFFICIENT ALPHAS FOR EACH DIMENSION AND FOR ALL ITEMS - (EFFECTIVENESS)

Scale	Coefficient Alpha
Intra-Organizational Relationships	.9405
Extra-Organizational Relationships	.8705
Instructional Coordination	.9059
Management Activities	.8983
TOTAL	.9732

ANALYSIS OF THE ULRA BY PROGRAM TSTAT FOR INDIVIDUAL ITEMS OVER FOUR SCALE FACTORS (EFFECTIVENESS)

Item No.	Scale	Correlation (total)	Correlation (scale)
1	4	.5319	.5753
2	1	.4565	.4958
3	1	.6198	.6877
4	1	.6549	.7080
5	1	.6832	.7250
6	3	.6367	.6334
7	2	.5062	.5831
8	3	.6449	.7111
9	2	.6933	.7146
10	1	.7270	.7571
11	3	.5899	.6478
12	3	.6404	.6039
13	1	.6725	.7459
14	2	.7020	.7289
15	2	.4552	.5702
16	2	.5616	.6542
17	2	.5159	.5937
18	1	.7230	.7970
19	1	.7140	.6683
20	4	.6946	.6185
21	2	.7143	.7348
22	4	.5592	.6743
23	4	.5372	.6004
24	4	.4909	.5879
25	2	.7100	.7013
26	4	.5397	.6617
27	1	.7166	.7278
28	4	.7040	.6781
29	1	.6463	.6812
30	3	.7137	.7434
31	2	.7084	.7007
32	1	.7803	.8237
33	1	.7290	.7952
34	4	.6610	.7244
35	4	.5225	.6389
36	4	.6608	.6787
37	1	.6652	.7285
38	3	.7254	.7272
39	3	.6967	.7403
40	1	.6349	.7032
41	1	.7540	.7903

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Item No.	Scale	Correlation (total)	Correlation (scale)
42	3	.6541	.7275
43	3	.5864	.6943
44	3	.6438	.6935
45	2	.5825	.6341
46	2	.7469	.7563
47	1	.6295	.5937
48	4	.5576	.5718
49	4	.6326	.7028
50	4	.6833	.6809
51	1	.6538	.7022
52	4	.5413	.5920
53	3	.6941	.7646
54	3	.5456	.5657
55	4	.5650	.6682
56	3	.6103	.6873

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APPENDIX I

F VALUES OF AMONG GROUP DIFFERENCES IN EXPECTATIONS BY ITEMS

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F VALUES RESULTING FROM ONE WAY ANALYSES OF VARIANCE OF THE EXPECTATIONS SCORES OF THE PRINCIPALS, UNIT TEACHERS AND UNIT LEADERS BY ITEM

Item	F Value	Critical Level
1	.142	.867
2	3.256	.042
3	1.357	.261
4	2.196	.115
5	.368	.693
6	2.974	.054
7	6.650	.002
8	5.274	.006
9	5.607	.005
10	3.241	.042
11	6.904	.001
12	12.273	.000
13	3.612	.030
14	1.180	.310
15	1.302	.275
16	.412	.663
17	.805	.449
18	1.476	.232
19	2.232	.111
20	1.320	.270
21	1.938	.148
22	1.671	.192
23	.392	.676
24	1.025	.362
25	.175	.840
26	3.416	.036
27	2.479	.088
28	.644	.527
29	3.066	.050
30	3.110	.047
31	.332	.718
32	1.490	.229
33	2.655	.074
34	.199	.820
35	1.529	.220
36	1.687	.189
37	1.200	.304
38	6.068	.003
39	4.984	.008
40	3.483	.033
41	.626	.536
42	3.058	.050
43	4.110	.019

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Item	F Value	Critical Level
44	2.597	.078
45	.900	.409
46	1.853	.161
47	3.340	.038
48	6.166	.003
49	.687	.505
50	.668	.515
51	.500	.608
52	.840	.434
53	3.929	.022
54	.811	.447
55	2.300	.104
56	6.199	.003

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APPENDIX G

T-TESTS OF DIFFERENCES IN MEANS BY GROUPS AND ITEMS

INDEPENDENT GROUPS T-TESTS OF DIFFERENCES IN MEANS FOR PRINCIPALS AND UNIT LEADERS BY ITEM

Item	t-value
1	.1917
2	.5400
3	.0000
4	.3960
5	.7429
6	1.011
7	2.655
8	2.573
9	2.038
10	2.027
11	2.785
12	2.990
13	1.903
14	.07594
15	.1936
16	.7190
17	.4768
18	.8080
19	1.455
20	1.370
21	.9843
22	1.557
23	.3120
24	.2913
25	.3659
26	1.359
27	1.505
28	.8759
29	1.098
30	.2057
31	.3237
32	1.178
33	.4134
34	.1192
35	1.445
36	1.265
37	1.244
38	2.786
39	2.607
40	1.728
41	.6827
42	.9493
43	1.952

Item	t-value
44	1.140
45	.7059
46	1.508
47	1.908
48	2.715
49	.5006
50	.3530
51	.7557
52	.8222
53	.4784
54	.2105
55	.1290
56	1.399

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INDEPENDENT GROUPS T-TESTS OF DIFFERENCES IN MEANS FOR PRINCIPALS AND UNIT TEACHERS BY ITEM

Item	t-value
1	.5271
2	2.430
3	1.427
4	1.980
5	.7429
6	1.011
7	3.493
8	3.002
9	3.320
10	2.347
11	3.523
12	4.916
13	2.595
14	1.367
15	1.484
16	.8388
17	1.257
18	1.717
19	2.054
20	1.442
21	1.969
22	1.609
23	.8737
24	1.360
25	.5855
26	2.613
27	2.174
28	1.064
29	2.471
30	2.262
31	.8094
32	1.682
33	2.170
34	.5958
35	1.576
36	1.786
37	1.421
38	3.204
39	2.800
40	2.592
41	1.109
42	2.452
43	2.792

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Item	t-value
44	2.279
45	1.341
46	1.790
47	2.464
48	3.286
49	1.168
50	1.129
51	.9447
52	1.279
53	2.631
54	1.193
55	2.129
56	3.498

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INDEPENDENT GROUPS T-TESTS OF DIFFERENCES IN MEANS FOR UNIT LEADERS AND UNIT TEACHERS BY ITEM

Item	t-value
1	.3354
2	1.890
3	1.427
4	1.584
5	.0000
6	1.416
7	.8383
8	.4289
9	1.283
10	.3201
11	.7373
12	1.927
13	.6921
14	1.291
15	1.291
16	.1198
17	.7781
18	.9090
19	.5992
20	.07210
21	-.9843
22	.05189
23	.5616
24	1.068
25	.2196
26	1.254
27	.6689
28	.1877
29	1.373
30	2.057
31	.4856
32	.5047
33	1.757
34	.4766
35	.1313
36	.5209
37	.1777
38	.4179
39	1333
40	.8640
41	.4267
42	1.503
43	8300

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Item	t-value
44	1.140
45	.0253
46	.2827
47	.5564
48	.5716
49	.6675
50	.7765
51	.1889
52	.4568
53	2.153
54	.9824
55	.8386
56	2.099

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