

A DESCRIPTIVE ANALYSIS OF PLANNING STRUCTURES AND FUNCTIONS
AS PERCEIVED BY SUPERINTENDENTS AND PRACTICED AND PERCEIVED
BY PLANNING INCUMBENTS IN MEDIUM STUDENT POPULATION SCHOOL
DISTRICTS (15,000-25,000) IN THE UNITED STATES

by

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Dissertation submitted to the Graduate Faculty of the
Virginia Polytechnic Institute and State University
in partial fulfillment of the requirements for the degree of

DOCTOR OF EDUCATION

IN

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June, 1976

Blacksburg, Virginia

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Chapter 1

INTRODUCTION

Planning as an intellectual activity has been a significant part of man's organizational endeavors from the earliest primitive tribes to the contemporary highly specialized organizations. Endeavors of planning design emerged in educational planning as early as Sparta's planned education system. In the United States, planning has progressed faster in private organizations than it has in public agencies such as school systems (Conrad, Brooks, and Fisher, 1973). Although Simon (1957) was one of the first to specify planning as an important administrative technique, it was not until the latter half of the sixties that the term "planning" began to appear as a formal term in the professional literature of education (Simon, 1964; Friedmann, 1967).

An important incentive for educators to concern themselves with the concept of planning was provided, in part, through actions of the federal government (Campbell, 1968; Eidell and Nogle, 1970). The realization of a need to look at planning strategies became evident to public school officials as the federal government established research and development centers emphasizing long-term planning and as the government offered funding at state

and local levels for special projects and programs requiring planning and accountability.

Pressure on the part of the public for quality education and for evidence of what was happening to the educational dollar has resulted in state level mandates requiring planning and accountability at the local school division level. An informal count placed some twenty states in the "having to plan" category due to direct or indirect state mandates that all levels of education perform systematic planning (Brieve, Johnston and Young, 1973).

However, even as these mandates appeared, planning as a meaningful, systematic and comprehensive process was virtually nonexistent in educational systems (Hartley, 1968; Higginson and Love, 1973; Weiss, 1973). Brieve, Johnston and Young (1973) indicated that in little more than a decade, the planning "movement", as reflected in federal and state mandates had virtually created a need for professional training in planning skills, and by extension, the need for formal planning mechanisms.

NEED FOR THE STUDY

With the current emphasis on comprehensive planning in education, many public school superintendents across the nation have established or are in the process of developing

formal planning structures and functions within individual systems. Currently the characteristics of such structures and functions appear to vary greatly among these school districts, as each educational institution has developed or is evolving a planning organization which best suits the particular institutional requirements. Little is known, however, of the formal structural and functional requirements as these currently exist.

The need for this study was thus based on the growing emphasis on planning in education, the seemingly varying characteristics of planning structures and functions within individual school districts, and the lack of descriptive data concerning such structural and functional arrangements.

STATEMENT OF THE PROBLEM

The problem of this study was to describe the structural and functional arrangements of formal planning organizations in education, as these are perceived by superintendents and practiced and perceived by planning incumbents in medium student population school districts (15,000-25,000) in the United States.

1. To ascertain descriptive characteristics of the planning structure and planning functions as perceived by school superintendents in medium student population school districts (15,000-25,000) in the United States.

2. To ascertain professional and selected personal characteristics of the planning incumbent in medium student population school districts (15,000-25,000) in the United States.

3. To ascertain descriptive characteristics of the planning structure and planning functions as practiced by planning incumbents in medium student population school districts (15,000-25,000) in the United States.

4. To ascertain descriptive characteristics of the planning structure and planning functions as perceived by planning incumbents in medium student population school districts (15,000-25,000) in the United States.

5. To ascertain the relationship between selected descriptive characteristics of the planning structure and planning functions as practiced and perceived by planning incumbents in medium student population school districts (15,000-25,000) in the United States.

6. To ascertain the relationship between selected descriptive characteristics of the planning structure and planning functions as perceived by school superintendents and practiced by planning incumbents in medium student population school districts (15,000-25,000) in the United States.

DEFINITION OF TERMS

The following definitions are formulated for the

specific purposes of this study to provide clarity of meaning:

1. Planning Structure - the formal organizational design for planning in education and relationship of the design to the overall organization of the school district.

2. Planning Function - the formal activities and processes for planning in education and the relationship of the activities to the organization of the school district.

SIGNIFICANCE OF THE STUDY

This study was conducted to provide superintendents of school districts, formal planning incumbents and other professional personnel with descriptive and normative information relative to planners and the planning structure and functions in medium student population school districts (15,000-25,000) in the United States. Through this research, superintendents, planners, and other professional personnel can become aware of the current extent of planning as well as of the general and specific patterns or approaches being developed in planning in education.

Further, the results of this study add to the currently limited research on planning in education and provide a basis for future studies. Such later studies might utilize the findings of this research to develop more efficient and effective structural and functional arrangements for planning in education.

LIMITATIONS OF THE STUDY

1. This study was conceived as an analysis of planning in education as it is currently practiced and perceived and does not attempt to project a theoretical or ideal model for any of the dimensions studied.

2. The study was limited to medium student population school districts, that is, those with a population of 15,000-25,000.

ORGANIZATION OF THE STUDY

Chapter 1 describes the background of the study, presents the need for the study, a statement of the problem, and the objectives and significance of the study. It further includes a definition of terms which are unique to the purposes of this study, and the research procedures utilized.

Chapter 2 is comprised of a review of the literature relevant to the definitions of the types of planning, descriptions of the planning process in education, the organizational position and structure for planning, the situational factors of the planner, and the characteristics and functions of the planner. Chapter 3 presents in detail the research methodology and procedures used. Chapter 4 offers the findings and analysis of the data and Chapter 5

contains a summary, conclusions, implications and
recommendations for further study.

Chapter 2

REVIEW OF THE LITERATURE

Literature relative to the purposes and objectives of this study was reviewed. An analysis of definitions and types of planning was undertaken in order to establish the parameter of the concept as it is used in this study. A search of the literature was conducted in an effort to ascertain a description of the planning process as it pertains to educational planning. Further attention was given the organizational position and structure for planning as well as to functional and situational factors relative to the planner, the planning staff, the client and consultant participation in the process. A final aspect of this review sought to delineate characteristics of the planner and his roles and functions as they appear to the literature.

PLANNING: DEFINITION AND TYPES

Many writers have offered definitions of planning:

Planning in its broad sense means any form of rational anticipation of and preparation for future action (Koontz, 1958).

Planning is the process of devising a basis for a future action (Seckler-Hudson, 1955).

Planning is a new management technique that

coordinates all the people and functions of a company in the achievement of practical goals, developed on a scientific and objective basis (Payne, 1958).

Beeby (1969) proposed a broad definition of educational planning. This definition was adapted by Johnston (1973) to present one of the most comprehensive concepts of educational planning found in the literature:

Educational planning is the exercising of foresight in determining goals, priorities, policies, programs and costs of an educational system, having regard for economic, social, and political realities, for the system's potential for growth (qualitatively and quantitatively) and for the needs of the region and the clientele served by the system.

Several writers have pointed out that planning generally falls into two categories or "types". One "type" of planning reflects various aspects of determining the future directions to be taken or objectives to be attained while another "type" of planning must be done to insure meeting the practicalities in achieving these objectives. Anthony (1965) divided planning into these two types and called them "strategic planning" and "management control". Nutt (1970) referred to two similar types of planning as "strategic" and "operational".

The term "strategic" refers to the processes of deciding objectives, defining the resources necessary for the achievement of objectives, and deciding upon the policies for governing the acquisition, use and disposition of these resources. "Management control", "allocative" or

"operational" planning refers to the processes necessary for assuring that resources are obtained and utilized in the accomplishment of these objectives. One type of planning cannot exist without the other since there must be the means and methods for accomplishment of defined objectives. To simply define what an organization wants to do without defining the resources and personnel necessary for accomplishing these objectives and without planning the means by which resources will be provided when and where needed is inadequate. The total cycle involving information about and consideration of all these aspects is essential. Thus, both "innovative" and "allocative" types of planning are part of the total process of planning.

Friedmann (1967) described two planning typologies on the basis of function and creativity as they relate to the promotion of change. These were "developmental" and "adaptive" planning. Developmental planning involves basic policy decisions and implies a high degree of autonomy in setting ends and selecting means. Adaptive planning is concerned more with the actions of others and often accommodates opportunities for special projects such as are possible through government or foundation grants. Friedmann further suggested two additional types of planning. He referred to "innovative" planning which included seeking to introduce and legitimize new institutional arrangements.

Innovative planning, as he defined it, is more concerned with mobilizing resources than in their optimal allocation among competing uses and focuses primarily on the immediate results of specific innovations. Allocative planning involves the assigning of resources among competing uses.

Many descriptions and models of the planning process are rational in concept and most contemporary theory appears to be based on such models. However, a few writers have pointed to the fact that, with few exceptions, pure rationality policy-making is improbable (Dror, 1968). Lindblom (1959) was particularly disturbed by the apparently widespread assumption that pure rationality was the one best choice paradigm. He advocated evolution of policies by incremental changes, summarizing requirements of incrementalist approach in this way: (1) focus only on those policies which differ incrementally from existing policies, (2) only a relatively small number of policy alternatives are considered, (3) for each policy alternative only a restricted number of important consequences are evaluated, (4) the problem is continually re-defined allowing for countless ends-means and means-ends adjustments which make the problem more manageable, (5) thus, no one decision or right solution is made, rather there is a never-ending series of attacks on the issues at hand through serial analyses and evaluation, (6) as such, incremental decision-

making is described as remedial, geared more to the alleviation of present concrete social imperfections than to the promotion of future goals.

Etzioni (1967) proposed a third approach to decision-making. He felt that a rationalist approach required greater resources than decision-makers command while the incremental approach, which takes into account the limited capacities of decision-makers, fostered decisions which neglected basic societal innovations. He recommended an approach known as "mixed scanning". In this synthesis of synoptic planning with incremental decision-making, some in-depth scanning of a few alternatives would be accomplished while in general scanning would be done of the entire range of possibilities. Thus, he felt by combining elements of both pure rationalism and the incrementalist approach that the weaknesses inherent in both would be lessened.

While rationalists were working to improve their models of decision-making, an alternative approach to planning came onto the scene during the mid-fifties which reviewed planning not as an intellectual process of efficiency adapting means to given ends, but as primarily a method of inducing organizational change (Leppitt, et al, 1958; Bennis, 1966; Friedmann and Hudson, 1974). The operating principle of this approach known as organization

development (OD) is that lasting change must come from within the organization and involve far-reaching changes in awareness, attitudes, behavior, and values on the part of organization members. Organizations are composed of communication networks among individuals who themselves have basic human needs for regard, power and opportunities for self-activation. The achievement of interpersonal competence is, therefore, essential to the successful functioning of organizations (Argyris, 1962). To the advocates of OD, the principal failure of the rationalist school was its neglect of the human side of planning.

From these discussions, it can be stated that planning cannot presently be sustained by a coherent body of theoretical propositions. In addition to differing approaches to planning, variations are possible in the time horizons ranging from immediate problems to policies intended to guide a system or organization for several years.

Current literature strongly supported the notion of long-range planning and future orientation (Chase and Clark, 1974; Goldman, 1969; Morphet and Jesser, 1969; Sanders, 1967; Ziegler, 1970). In many cases, long-term goals are expressed by a long-range comprehensive or master plan. Short-term planning, it is assumed, is measured against the yardstick of such a master plan (Bolan, 1967).

There was no evidence in the literature of master plans in education. However, such action as the current five year planning mandate of the State of Virginia indicates emerging development of long-term or "master" plans in education.

PLANNING PROCESS IN EDUCATION

Thomas (1974), in discussing educational planning in school districts, pointed out that an educational organization should be viewed as a complex system. He said that the term "system" implies that the parts of the total organization are related to each other in a manner which leads to the achievement of the organization's goals. Due to this inter-relatedness, he concluded that educational planning will increasingly require the cooperation of various members of the total educational organization.

A number of models, not too dissimilar, of the planning process appear in the literature. Corrigan and Kaufman (1966) suggested a six-step problem-solving planning process. It included identification of needs, determination of solution requirements and alternatives, selection of solution strategies and tools, implementation, determination of performance effectiveness and finally, revision as required. Kaufman (1970) referred to this model as a "systems approach" to education in a system where each part was dependent on the other, representing a

closed-loop, self-correcting process for proceeding from identified needs to predictable outcomes.

Other writers have suggested "systems approaches" (Lehmann, 1968; Sagan, 1972; Silvern, 1972; Barbee, 1972). Rudwick (1969) gave specific attention to systems theory in his discussion of the planning process. Cook (1967) divided system process and planning into two basic stages - analysis and synthesis. He saw analysis as involving division into parts and activities or tasks. The synthesis phase involved integration and unification into operational wholes based on systems goals. Silvern (1965) described a planning process consisting of four major parts. He included analysis and synthesis but added modeling and simulation. Whatever the specific steps defined, such models attempt to build in "systems" effects in order that an action taken regarding one part of the educational system can be analyzed in terms of its effects on other parts of the system.

Catanese and Steiss (1970) described the planning process in terms of three basic components: input, conversion, and output. Input includes: (1) identification of problems and their inter-relationships, (2) determination of goals and objectives associated with identified problems, (3) appraisal of existing policies and procedures, and (4) formulation of available alternatives to reach goals

and objectives. In the conversion component, the planning process includes: (5) evaluation of alternatives involving identification of by-product and side-effects as well as determination of approximate benefits and costs. The output of the planning process consists of (6) recommendation of appropriate alternatives and (7) feedback.

In terms of planning in education, these three components are broadly described in the following manner. Input involves identification of needs, defining of objectives associated with defined needs, assessment of current programs in relation to objectives and formulation of possible alternatives to achieve objectives. In the conversion component, educational planning includes determination or selection of most suitable alternatives based on available resources. The output component includes recommendation of appropriate alternatives for implementation and planning for an evaluative feedback process.

Chase and Clark (1974) presented a synthesis of several approaches to planning, coupled with Kahn's (1968) notions of alternative futures. Their steps included: (1) establishing goals, (2) developing planning premises, (3) developing alternative futures based on alternative planning premises, (4) developing a plan for each future, (5) developing derivative plans for each alternative future plan and developing monitoring and shifting procedures.

Johnston (1975) described four types of rationality which strongly influence the types of decisions that are made in the planning process based on the value orientation of the organization of which it is a part. These types included technical, economic, social and political rationality.

Both technical and economic rationalities are concerned with efficient resource utilization. Several authors emphasized the inclusion of cost in relation to output as an important aspect of a planning model (Sanders, 1967; Temkin, 1970). Linear programming, PERT and various manifestations of PPBS reflect these basic rationalities. Johnston (1975), however, cautioned against too much emphasis in this rationality saying:

The planner who views planning as budget, finance, and cost equations can be most helpful; but if he views this as the entire planning function, he may well do more harm than good in the long run.

Social rationality has been the basis for considerable study and writing in relation to the manner in which individuals function in an organization (Lewin, 1952; Etzioni, 1964; Likert, 1962). Organizational Development (Levine, Derr and Junghans, 1972) is seen as a people involving approach to planning and appears strongly influenced by a social rationality.

Morphet and Ryan (1965) are of the opinion that

planning is a rational analysis of pertinent information drawn from the environment and from the people who will be affected by the planning. Chase (1969) pointed out that much of the early attention in the planning process or of the work of planning staffs has been given to information processes. Brieve, Johnston and Young (1973) saw the planning process within a societal arena which delineates the boundaries for setting the goals of education.

Pack (1974) delineated a planning process similar to many others, including pre-planning, goal development, needs assessment, problem analysis, generation of alternatives, implementation, evaluation and recycling. He emphasized the fact that the planning process is a cycle and not a straight line with a beginning and an end, stating that ". . . it does not seem necessary to begin the planning process at any specific point. . . ." In conclusion, he stated that, "There is, yet, no dogma, or single 'right' way to practice educational planning."

Johnston (1975) described a political rationality which is ". . . akin to social rationality in that its concern focuses on relationships of individuals and groups, usually arranged in some hierarchic fashion." He further stated, "political rationality is concerned with how and by whom which decisions will be made." Other authors have given attention to this and indicate the need for the

planner to have a firm grasp of this often complex area (Dahl, 1961; Bolan, 1967; Temkin, et al, 1975).

Decisions relating to many aspects of planning such as the organizational position and structure for planning will be influenced by one or more of these rationalities. Further, they will influence the role of a planner in a particular organization as well as help determine the qualifications needed to function effectively in such a role.

ORGANIZATIONAL POSITION/STRUCTURE FOR PLANNING

The actual structure for planning is different among agencies utilizing planning departments. In city planning, the structure has varied from independent agencies or quasi-independent agencies to municipal departments reporting directly to the chief executive. Rabinovitz and Pottinger (1967) described four positions for planning within a system. The first came from the writings of Walker (1950) who described the planner as an advisor directly to the chief executive. Kent (1964) suggested a second position wherein the planner is employed by a legislative body. Rabinovitz and Pottinger (1967) further described a third position where planning is done by an independent, non-political advisory board or commission, and a fourth position disperses planning among a

number of special purposes ad hoc committees created as needed.

Although it appears that not one of these types or positions can be defined as best and suitable for every city, Rabinovitz and Pottinger concluded, on the basis of a survey of 201 urban planning directors throughout the country, that a combination of the executive and independent bodies appeared to perform somewhat more satisfactorily than a single structure. They pointed out that the directors of combined agencies encountered fewer conflicts with city councils and fewer found their long-range goals in conflict with the demands of the chief executive. In education, it has been pointed out that closeness to or at least support of the major decision-makers is important. However, Banghart and Trull (1973) pointed out that educational planning must include decisions made at the community level and not just those of the school board. They supported the inclusion into planning processes information and input from social agencies, cultural groups and others interested in the total development and well-being of the community.

Regardless of the position of the planning structure, the literature reinforced the notion that the chief executive(s) must be totally supportive of the planning function (Brown, 1972; Newell, 1963; Catanese and

Steiss, 1970). Devons (1951) in describing the central planning directorate function in the Ministry of Aircraft Production during World War II, stated, "It was not only necessary that the planning directorate should be directly responsible to the Chief Executive, but also that the Chief Executive should normally be prepared to accept its advice on programme matters." He went on to say, "The usefulness of the planning directorate varied directly with the esteem in which it was held by the Chief Executive."

Rabinovitz and Pottinger (1967) concluded ". . .that cities are more likely to have a firmer commitment to the planning process if the planning function is directly responsible to the principle decision-makers." They noted that the availability of a formal organization chart appeared to provide an indication of a more "progressive" attitude on the part of city officials and indicated the likelihood of a strong commitment to planning.

Rabinovitz (1967) stated that even when the role of the planner is held constant, there is a difference in effectiveness associated with differences in the pattern of political decision-making. In cities where decisions are made by a small number of participants, the planner operated successfully in the technician role. Where there were more groups involved and where the decision-making pattern was more diffused, planning was ineffective.

The planning function in education, in order to be effective, must be located close to the top decision-makers--the superintendent and the board of education (Pack, 1974). Temkin, et al (1975) stressed the commitment necessary for planning within a school on the part of the school board and central office administrators. They further defined three general types of commitment required--attitudinal commitment, budgeting commitment and organizational modification.

FUNCTIONAL AND SITUATIONAL FACTORS FOR PLANNING

Planning has been described as the responsibility of all leaders in the organization (Seckler-Hudson, 1955). However, as organizations begin to see the significance of planning, there is a growing tendency to establish a specific office and/or offices for planning (MacCullough, 1964; Summer, 1961). Catanese and Steiss (1970) pointed out that the planning process is highly dependent on a relatively long-term continuity of concepts and personnel. They concluded that the length of time that a planning director had spent in a community served as an important input contributing to the level of planning commitment. They added, however, that cities with high planning commitment appeared to be less affected by changes in the directorship of the planning function than did those cities

with less commitment to planning.

Writers outside the field of education have specified the need for a planning staff. Schaffer (1965) said that wherever there is an official position of "planner", there is usually a staff of planning specialists. He indicated that a minimum staff includes a head, one or two assistants, plus a secretary. Catanese and Steiss (1970) reported that in city planning, staff size has an important bearing on the level of planning commitment. Pack (1974) stated that most school districts should find one full-time planner sufficient to meet the planning needs.

The involvement of people throughout the organization is a prime responsibility of the planner (Argyris, 1953; Newell, 1963; Payne and Kennedy, 1958). The literature of educational planning consistently emphasized the involvement and participation of school personnel at all levels in the planning process (Temkin, et al, 1975; Thomas, 1974). The literature further supported the involvement of citizen participation at every level (Blakely, 1975; Humphreys, 1975).

The utilization of outside consultants appeared in much of the literature. In urban planning models, Pack (1975) reported that outside consultants were utilized in 27 percent of already developed models, while 45 percent of models currently being developed utilized outside

consultants, this indicated growth in the utilization of outside consultants. She concluded that collaborative arrangements are generally seen to be more successful than those which rely exclusively on a single source. Writers in the area of educational planning supported the utilization of outside expertise (Pack, 1974). This literature, however, did not describe the role of consultants specifically. It appears that such roles would be based on the specific rationality of an organization and its perceived needs for assistance.

THE PLANNER: CHARACTERISTICS/ROLE AND FUNCTION

There is no clear-cut definition of a professional planner (Thomas, 1974). There is a tendency, particularly in the field of education, to conceive of the planner as a generalist rather than a specialist (Rabinovitz, 1967). However, studies indicate that the promotion of technicians from lower levels to planning positions in urban planning has not proven successful (Gold, 1965).

The professional characteristics of an educational planner are not clearly defined in the literature. Thomas (1974) said he must be competent and well-qualified with power based on unquestioned expertise. He further stated that the planner should be an employee of the school system, be visible before the school board and in the community

and have an adequate budget and staff. Pack (1974) delineated an almost super-human list of skills the educational planner must possess. These involve human relations, community relations, and group process skills. He further stated a need for the mastery of a number of technical skills including the ability to develop projective and analytic models as well as management and programming models; the ability to work creatively with goals and objectives and to be able to understand the implications for the district of a variety of data.

Doland and Parker (1962) summarized the role of the planner under four headings. As an institutional leader, he supervises his own department and staff. As a professional planner he is involved in the planning process, as described earlier. Thirdly, he is constantly monitoring the political atmosphere of the community. He identifies and uses various strategies to persuade political thinking toward desired goals. Skillful use of communication is essential. His final role as promoter is to keep the public informed.

The educational planner uses three basic professional methods: consulting, training and research. The consulting aspect includes assisting the client to formulate and evaluate new or existing data. The training role involves helping the client, through education and training,

to change in a specific way. The research role of the planner includes investigating data and conditions, theory generation, evaluation, and providing this information to the client system in a form usable for decision-making (Sashkin, et al, 1974).

Bolan (1967) summarized the situation by stating:

Unlike other professions, such as engineers, doctors, etc., the planner has no clearly defined area of technical expertise which is universally recognized. He must constantly devise models or methods to deal with value choices which, as yet, are not totally technically bounded.

Rabinovitz (1967) stated that the planner is neither the determiner of goals nor the instigator of programs. Apparently he functions in a realm between decision-makers and the practitioners of action. Writers describing the corporate planner have emphasized the role of coordination. The planner does not decide on actual plans as much as he plans and coordinates the total process which assures that others are planning. MacCullough (1964), Summer (1961) and Duhl (1967) described the planner as a "change agent".

SUMMARY

The review of the literature indicated that there are many definitions for planning but that it is basically an effort in exercising foresight to determine future goals and directions. Such efforts are based on an awareness of the needs and resources of a system, including consideration

of the total environment in which the system exists, in an effort to move toward optimum achievement of desired objectives. Planning must be done in terms of establishing goals and objectives and in relation to practical means for implementation of activities to achieve these objectives.

Most of the contemporary approaches are based on rational models relying heavily on scientific accumulation of information and basic decisions on the basis of this. There has been some reaction to these basically rationalist models and several authors have advocated what they consider to be more humanistic models for planning. The literature further reflected the need for long-range, as well as short-range planning.

No universal organizational structure, as the best model for planning, was described. Research has indicated that a combination of existing structure and organizational positioning of the planning function may be the best. Strong support on the part of organizational leaders for the planning process was reported as necessary for success.

The literature supported the need for a planning staff wherever there is an individual designated as planner. The involvement of organization members from all levels of the system was recommended. The utilization of outside consultants for assistance in training personnel and in developing planning models appeared as an often-used practice.

Specific characteristics of the planner were not clearly defined in the literature. However, general descriptions implied a lengthy agenda of personal and professional characteristics. Just as there was no coherent body of theory on the planning function, there was no coherent agreement on the role or function of the planner. The general notion within the literature was that the planner functions in a realm between the decision-makers and the educational practitioners using his expertise to bring about planned change through coordination among many parts of the system.

Chapter 3

RESEARCH PROCEDURES

The purpose of this chapter is to present the methodology used to accomplish the objectives of the study. The research procedures of this study followed the general methodology applicable to ex post facto research. Kerlinger (1964) defined ex post facto research as:

That research in which the independent variable or variables have already occurred and in which the researcher starts with the observation of a dependent variable or variables. He then studies the independent variables in retrospect for their possible relations to, and effects on, the dependent variable or variables.

In evaluating ex post facto research, Kerlinger stated three built-in weaknesses: (1) the inability to manipulate independent variables, (2) the lack of power to randomize, and (3) the risk of improper interpretation. In other words, compared to experimental research, other things being equal, ex post facto research lacks control; this lack is the basis of the third weakness: the risk of improper interpretation.

Despite its weaknesses, Kerlinger stated much ex post facto research must be done in psychology, sociology, and education simply because many research problems in the social sciences and education do not lend themselves to

experimental inquiry. In education, Kerlinger stated that probably ex post facto research is more important than experimental research.

Understanding the limitations and recognizing the contributions of research using the ex post facto method, this study attempted to use this method to describe the structural and functional arrangements of formal planning organizations in education as specified in the objectives of the study. The following research procedures were employed.

The population of study was identified. The conditions of data collection were determined and two questionnaires based on the review of literature were developed by the researcher and reviewed by six experts (Appendix C) and suggested changes to the instruments were made. The questionnaires were then mailed to the subjects in the study, and upon return of questionnaires, the responses tabulated and recorded. These data were then analyzed electronically, using pre-determined statistical techniques. These research procedures provided the results of the study.

POPULATION

The source of data for the study was a population composed of superintendents and planning incumbents in

medium student population school districts (15,000-25,000) in the United States. In order to identify these school districts, the investigator contacted the American Association of School Administrators. A computer printout of the names and addresses of superintendents of medium student population school districts (15,000-25,000) was returned to the investigator and was utilized as the source of data for the study.

The total population of the study was composed of 223 superintendents and an undetermined number of planning incumbents in the medium student population school districts (15,000-25,000) in the United States. Of the fifty states, medium student population districts were identified and included in the study in forty-three states. Those states that did not have medium student population districts (15,000-25,000) were: Alabama, Maine, Mississippi, Nebraska, Nevada, New Hampshire, and Wyoming.

INSTRUMENTS

Two self-report questionnaires, Questionnaire to Superintendents (Appendix E) and Questionnaire to Education Planners (Appendix F), based on the review of literature were developed to collect data needed to accomplish the objectives of the study. The Questionnaire to Superintendents focused primarily on characteristics of

the structural and functional arrangements of planning as perceived by superintendents in the population. The superintendent's questionnaire was designed to accomplish Objective Number One of the study.

The Questionnaire to Education Planners contained three sections. Section I was designed to collect data on twenty-five structural and functional aspects of planning as identified in the review of literature with additional items based on the researcher's experience as an education planner. The planning incumbents were asked to respond to the identified structural and functional arrangements of planning as they currently existed in their district and also as they perceive they should exist in their district. Section II focused on professional and selected personal characteristics of the education planner. Section III was designed to provide general demographic, economical, political, and organizational characteristics of the school districts in the population. The first two sections of the education planner's questionnaire were designed to accomplish Objectives Number Two, Three, Four and Five of the Study. Section III provided information for further analysis not required by the objectives of the study.

The questionnaires were subject to a pilot test prior to being sent to the superintendents and education planners included in the population of the study. The pilot

test was conducted by administering the questionnaire(s) twice to two superintendents, two education planners, and two education consultants (Appendix D). The questionnaires were administered first to ascertain the procedure and time needed to complete the responses. A second copy of the same questionnaires was administered to the superintendents, education planners, and education consultants to ascertain readability, layout, length of questions, format for marking responses, substance, additions or deletion of items and clarity of meaning. Each recommendation made by the pilot test superintendents, planners, and consultants was evaluated individually and as part of a composite.

Following the pilot test, no items were revised on the Questionnaire to Superintendents and one item was revised on the Questionnaire to Education Planners. The superintendents and education planners who participated in the pilot test were not included in the total population of the study.

DATA COLLECTION PROCEDURES

Both questionnaires were enclosed in one envelope with a cover letter (Appendix C) and two self-addressed, stamped return envelopes. These packets were mailed to the 223 school superintendents in the population. The enclosed

cover letter requested the superintendents to complete the superintendent's questionnaire and return it in the stamped envelope provided. The superintendents were also requested to ask their respective education planner (if any) to complete the second questionnaire and return it in the stamped envelope provided.

DATA ANALYSIS

In analyzing the data collected through the Questionnaire to Education Planners, Section I: Planning Structures and Functions, Part A and Part B, factor analysis with a varimax rotation was utilized. Kerlinger defined factor analysis as a method for determining the number and nature of the underlying variables among large number of measures. The primary purpose of factor analysis was to reduce the dimensions of the study by determining which items could be grouped and studied together and to provide the impetus for further data analysis activities. With the purposes the rules (number of observations) for utilizing factor analysis were relaxed.

The items that were identified and grouped together through factor analysis were defined as sub-areas and served as the dependent variables for the study. The state of the nature of planning structures and functions as perceived and practiced by the education planners served as

the independent variable.

Once the sub-areas were determined through factor analysis, the linear combinations of the sub-areas were analyzed utilizing the Hotelings T^2 . This procedure determined if there were any differences between the 'As It Is' and 'As It Should Be' responses on the linear combinations of the sub-areas. If a significant difference ($\alpha=.10$) was found on the linear combinations, simultaneous confidence intervals were developed to determine which of the sub-areas was contributing to the significance of the multivariate initial analysis (Morrison, 1967). Once the sub-area(s) contributing to significance were identified, individual items within the sub-area(s) were analyzed. This analysis identified the items which were the major contributors within the significant sub-area(s).

Frequency counts and a percentage of response were calculated for each item in Part C of Section I: Planning Structures and Functions. Rankings based on the frequency counts were determined for items #1, #2, and #3.

These analyses were directed toward Objectives Number Three, Four and Five of the study. The analyses for Objective Number Three and Four provided descriptive characteristics of the planning structure and planning functions as practiced and perceived by education planners. The analyses for Objective Number Five provided the

relationship between descriptive characteristics of the planning structure and planning functions as practiced and perceived by education planners.

The chi-square test and accompanying phi-coefficient were utilized in analyzing data for Objective Number Six. The purpose was to ascertain the degree and direction of association between the superintendent's and planner's responses to the selected planning function and structure items.

Frequency counts and a percentage of response were calculated for each item in Section II: Education Planner's Characteristics. These analyses were directed toward Objective Number Two of the study and professional and selected personal characteristics of the education planners.

In analyzing the data collected from the Questionnaire to Superintendents, frequency counts and a percentage of response was calculated for each item. A mean was also calculated for Item #3 and #4. These analyses were directed toward Objective Number One and, therefore, provided descriptive characteristics of the planning structure and planning functions as perceived by school superintendents.

Further analyses were employed by relating selected demographic variables in Section III: School District

Characteristics with the response of the education planners to items in Part A and Part B of Section I: Planning Structures and Functions. The purpose of this analysis was to determine the relationship of the selected demographic variables to the responses of the education planners. Contingency coefficients were computed and tested for significance ($\alpha = .10$). Significant coefficients were noted and discussed.

Chapter 4

PRESENTATION AND ANALYSIS OF DATA

Previous chapters provided a statement of the problem and objectives of the study, a review of the literature and the research procedures utilized. This chapter contains a description of the results of the study. Simple data description, factor analysis and a test of significant differences were used in the analysis of data.

One hundred and sixty-four, or 74 percent of 223 questionnaires (Appendix E) that were forwarded to superintendents in medium student population school districts (15,000-25,000) in the United States were returned. Of the 164 returned questionnaires, 49 or 30 percent of the superintendents indicated that they did have a formal planner (other than themselves) in their district; that is, a person who has planning as one of his major responsibilities. Of the forty-nine superintendents who replied positively, the corresponding questionnaire was received from their district planner. No follow-up letters were sent.

The results of the data analysis were organized and presented according to the six objectives of the study.

OBJECTIVE NUMBER ONE

To ascertain descriptive characteristics of the planning structure and planning functions as perceived by school superintendents in medium student population school districts (15,000-25,000).

Means and standard deviations given by the superintendents on the five planning structure and function items are shown in Table 1. The superintendents were asked to respond to each item based on the following scale:

- 1 = Strongly Disagree
- 2 = Disagree
- 3 = Tend to Disagree
- 4 = Tend to Agree
- 5 = Agree
- 6 = Strongly Agree

The purpose of using the six point scale was to force the superintendents to make a judgment response to each item. A no opinion response was purposely not included. The higher the mean of the total group, the higher was the agreement on that item. A mean of 3.5 was considered to be the lowest entry level of the "tend to agree" category, with other entry levels at the same intervals.

The means of the responses on all but one item were 3.5 or higher, indicating a tendency to agree on these items. The highest mean was on Item 3:d indicating strong agreement on the role of the planner as a facilitator.

Item 3:a which concerned the planner as being a policy planner had the lowest mean (3.4) indicating a very slight tendency to disagree. Also, superintendents tended to agree (4.4) that their planning operation had been of value to them. Exact means and standard deviations on all items are presented in Table 1.

An additional item relevant to the initiation of planning was included on the Questionnaire to Superintendents. Frequencies and percent of responses given by the Superintendents on the item are presented in Table 2. Thirty-eight, or 78 percent of those superintendents responding felt a perceived local need prompted them to initiate their planning operation. Twelve percent of the superintendents felt planning was a result of a state mandate, four percent felt planning a result of federal programs, and six percent felt a key issue in their district initiated planning.

OBJECTIVE NUMBER TWO

To ascertain professional and selected personal characteristics of the planning incumbent in medium student population school districts (15,000-25,000) in the United States.

As presented in Table 3, 55 percent of the respondents indicated that their title was Director of Planning. Thirty-nine percent checked the "other" category, and indicated titles such as Supervisor of

Table 1
Responses of Superintendents on Planning
Structures and Functions

Item (Planning Structure and Functions)	Respondents	
	Mean	S. D.
3:a I view my planner as a policy planner.	3.449	1.699
3:b I view my planner as a program planner.	4.265	1.413
3:c I view my planner as a resource allocation and budget planner.	3.694	1.443
3:d I view my planner as a facilitator (helps others plan).	5.469	1.844
3:e I view my planner as a technician planner (collects and analyzes data).	4.796	1.323
4 I feel our planning operation has been of value to me.	4.429	0.890

Table 2
Responses of Superintendents on the
Initiation of Planning

Item (Initiation of Planning)	Respondents	
	N	Percent
7. What prompted you to initiate your planning operation?		
a. State Mandate	6	12.2
b. A perceived local need	38	77.6
c. Operation of local federal programs.	2	4.1
d. A key issue in your district.	3	6.1

Table 3
Responses of Education Planners
on Formal Title

Item (Formal Title)	Respondents	
	N	Percent
1. Your formal title is:		
a. Associate Superintendent for Planning	1	2.0
b. Assistant Superintendent for Planning	0	0
c. Director of Planning	27	55.1
d. Coordinator of Planning	2	4.1
e. Other	19	38.8

Planning, Administrative Assistant for Planning and Coordinator of PPBS. Four percent checked the title of Coordinator and two percent checked the title of Associate Superintendent.

There was a wide range of responses to the number of years that education planners had been in their present position. An analysis of the data in Table 4 reveals a range from 22 percent for five years or more to ten percent for less than one year.

Thirty-three percent of the respondents held some type of central office position prior to that of education planner. Twenty-nine percent had been principals and 22 percent responded that they had held other positions. When asked to specify these, the planners indicated prior positions in urban planning, in corporate planning, and in private research. As reflected in Table 5, all other responses were in the four to six percent range, with the exception of guidance counselor, which was zero.

In response to educational level, 88 percent of the education planners had completed work beyond a Master's Degree. Of this 88 percent, 51 percent responded to the Master's Degree plus category, 20 percent to the Doctor's Degree category and 16 percent to the Doctor's Degree plus category. Ten percent of the planners had their Master's Degree and two percent indicated the Bachelor's Degree.

Table 4
Responses of Education Planners on
Years in Present Position

Item (Years in Present Position)	Respondents	
	N	Percent
2. How many years have you been in your present position?		
a. Less than one year	5	10.2
b. One year	8	16.3
c. Two years	10	20.4
d. Three years	8	16.3
e. Four years	7	14.4
f. Five years	11	22.4

Table 5
Responses of Education Planners
on Previous Position

Item (Previous Position)	Respondents	
	N	Percent
3. What was your position prior to your present position?		
a. Principal	14	28.6
b. College Professor	3	6.1
c. Teacher	3	6.1
d. Guidance Counselor	0	0
e. Psychologist	2	4.1
f. Graduate Student	0	0
g. Central Office	16	32.7
h. Other	11	22.4

Frequency counts and exact percentage of responses are presented in Table 6.

An examination of the data presented in Table 7 indicated that a majority of the educational planners, at their highest educational level, majored in Administration. This category contained 67 percent of the planners, while 14 percent responded to a major in curriculum and instruction. Other percentages were in the two to six percent range. There were no responses to the evaluation and statistics categories.

In response to the item dealing with formal training, 57 percent of the education planners indicated they had some formal training in planning. Forty-three percent responded that they had had no formal training in planning. Frequency counts and percentages of responses to this particular item are presented in Table 8.

As indicated in Table 9, more than half of the education planners were employed from within the district. This category encompasses 55 percent of the respondents.

OBJECTIVE NUMBER THREE

To ascertain descriptive characteristics of the planning structure and planning functions as practiced by planning incumbents in medium student population (15,000-25,000) school districts in the United States.

Table 6
Responses of Education Planners
on Educational Level

Item (Educational Level)	Respondents	
	N	Percent
4. Your education level is:		
a. Post-Doctorate Studies	8	16.3
b. Doctorate	10	20.4
c. Master's Plus	25	51.0
d. Master's	5	10.2
e. Bachelor's	1	2.0

Table 7
Responses of Education Planners
on Educational Area/Major

Item (Educational Area/Major)	Respondents	
	N	Percent
5. At your highest level, your educational area/major was:		
a. Administration	33	67.3
b. Curriculum and Instruction	7	14.3
c. Research	3	6.1
d. Supervision	1	2.0
e. Evaluation	0	0
f. Planning	2	4.1
g. Statistics	0	0
h. Other	3	6.1

Table 8
Responses of Education Planners
on Formal Training

Item (Formal Training)	Respondents	
	N	Percent
6. Have you had any formal training in planning?		
a. Yes	28	57.1
b. No	21	42.9

Table 9
Responses of Education Planners
on Employment

Item (Employment Factor)	Respondents	
	N	Percent
7. When you were employed as education planner were you employed		
a. From within the district	27	55.1
b. From outside the district	22	44.9

OBJECTIVE NUMBER FOUR

To ascertain descriptive characteristics of the planning functions as perceived by planning incumbents in medium student population (15,000-25,000) school districts in the United States.

Means and standard deviations for the 'As It Is' items and the 'As It Should Be' items on Section I of the Questionnaire to Education Planners are presented in Table 10. The 'As It Is' analyses are applicable to Objective Number Three and the 'As It Should Be' analyses are applicable to Objective Number Four. The education planners were asked to respond to each planning function and structure item under the 'As It Is' and 'As It Should Be' columns. The education planners utilized the same rating scale as did the Superintendents.

The 'As It Is' mean for four of the 25 items was 4.5 or higher, indicating agreement on these items. The highest mean was 4.8 on Item A:17 concerning the commitment of the superintendent to the planning operation. Three other items had a mean of 4.5 to 4.9 indicating agreement on Item A:2 (helps others to plan), Item A:3 (systems concept) and Item B:4 (involvement of all levels of school personnel in planning). The mean for Item B:3 was below 3.5, indicating a tendency to disagree. The item concerned the planner as being neither the determiner of goals nor the instigator of programs. All other items fell between

Table 10

Response on 'As It Is' and 'As It Should Be' Items
Section I, Questionnaire to Education Planners

Item	Respondents			
	'As It Is'		'As It Should Be'	
	Mean	S. D.	Mean	S. D.
Part A: Education Planning Functions				
1. Our planning operation is geared primarily toward having an impact on learner outcomes.	3.878	1.550	4.959	1.428
2. In our planning operation we do not decide on the content of actual plans as much as we plan and coordinate the total process in helping others to plan.	4.612	1.362	4.694	1.661
3. In our planning operation we view the school district as an organized unit in which planned change in one aspect of operations will trigger changes in other operations.	4.510	1.356	4.918	1.397
4. Our planning operation includes a long-range comprehensive or master plan.	4.184	1.564	5.122	1.452

Table 10 (continued)

Item	Respondents			
	'As It Is'		'As It Should Be'	
	Mean	S. D.	Mean	S. D.
5. Our planning operation has the real commitment of our fellow central office administrators.	4.082	1.397	5.122	1.589
6. Our planning operation is primarily concerned with the actions of others and often accommodates opportunities for special projects such as are possible through state, federal, and foundation grants.	4.224	1.295	4.367	1.629
7. Our planning operation recognizes that lasting change must come from within the organization and involves far-reaching changes in awareness, attitudes, and values on the part of organization members.	4.327	1.297	5.061	1.600
8. Our planning operation primarily involves basic policy decisions.	3.837	1.390	4.347	1.393
9. The success of our planning operation is highly dependent on a long-term continuity of planning personnel.	4.306	1.489	4.020	1.689

Table 10 (continued)

Item	Respondents			
	'As It Is'		'As It Should Be'	
	Mean	S. D.	Mean	S. D.
10. Our planning operation is cyclical as it is not necessary to begin our planning process at any specific point.	3.735	1.483	3.878	1.691
11. In the final analysis, the results of our planning operation reflect the values of the person(s) who really control our organization.	4.102	1.489	3.939	1.478
12. Our planning operation is primarily concerned with efficient resource allocation and utilization.	3.918	1.288	3.898	1.686
13. Our planning operation includes in the planning process cooperative arrangements with governmental and social agencies.	4.163	1.179	4.980	1.199
14. Our planning operation is primarily technical as we are heavily involved in collecting, organizing, and analyzing data.	3.673	1.162	3.469	1.226

Table 10 (continued)

Item	Respondents			
	'As It Is'		'As It Should Be'	
	Mean	S. D.	Mean	S. D.
15. Through the type and number of alternatives we submit to our superior(s) we often control decision-making.	3.816	1.364	3.612	1.525
16. Our planning operation seeks to define what our organization wants to do as well as defining the resources and personnel necessary for accomplishing these goals.	4.408	1.206	4.939	1.464
17. Our planning operation has the "real" commitment of my superintendent.	4.837	1.491	4.327	1.420
Part B: Education Planning Structures				
1. As an education planner, I am directly involved in formulating the decision making structure in our district.	4.122	1.424	4.714	1.242
2. As an education planner, I am directly involved in the process of developing broad goals that guide our district.	4.490	1.570	5.000	1.225

Table 10 (continued)

Item	Respondents			
	'As It Is'		'As It Should Be'	
	Mean	S. D.	Mean	S. D.
3. As an education planner I am neither a determiner of goals nor the instigator of programs.	3.102	1.517	3.184	1.776
4. Our planning operation emphasizes the involvement of school personnel at all levels in the planning process.	4.737	1.426	5.306	1.402
5. New staff and new funds were allocated at the outset of our planning operation.	3.837	1.951	4.531	1.596
6. Our planning operation includes the involvement of citizen participation at all levels in the planning process.	3.959	1.594	4.755	1.422
7. Our planning operation utilizes outside consultants.	3.653	1.588	4.102	1.584
8. In our planning operation I report directly to the Superintendent.	4.204	1.871	4.837	1.586

the 3.5 - 4.4 range indicating a "tendency to agree" with each.

As displayed in Table 10, the 'As It Should Be' means for 15 of the 25 items were 4.5 or higher, indicating agreement on these items. The means for seven of these items were above 5.0. These items were: A:4 (long-range master plan), A:5 (commitment of fellow central office administrators), A:7 (lasting change must come from within the organization), A:13 (cooperation with other agencies), A:17 (commitment of Superintendent), B:2 (developing broad goals) and B:4 (involvement of school personnel).

The means of nine 'As It Should Be' items ranged between 3.5 and 4.4 indicating a tendency to agree. The lowest mean was for Item B:3 indicating a tendency to disagree with the concept of the planner as neither a determiner of goals nor the instigator of programs. Two items (A:14 and 15) ranked slightly lower in the 'As It Should Be' column than in 'As It Is'. Item A:14 concerned the technical aspects of the planning operation, and Item A:15 related to the planner having control over decision-making.

The education planners ranked curriculum and instruction first when asked to rank various areas in their order of importance from the standpoint of formal planning. The area of budget was second, staff

development third, building programs fourth, and school and community relations was fifth. Exact means and other rankings are presented in Table 11.

An examination of the data in Table 12 revealed that planners ranked developing long-range district level plans first when asked to rank various tasks in their order of importance from the standpoint of formal planning. Collecting, organizing and analyzing information and developing short-range district level plans were a close second and third, respectively, despite the fact that planners had ranked technical tasks higher on the 'As It Is' than they did on the 'As It Should Be' column in Table 10. Trouble shooting crises was ranked last.

The education planner ranked central office staff first when asked to rank a list of personnel in order of planning time they spent in direct communication/contact with them. The superintendent was ranked second, school principals third, teachers fourth and school board fifth. Exact means and other rankings are presented in Table 13.

As noted in Table 14, the education planners ranked the superintendent first when asked to rank various client groups. Central office staff were ranked second, school principals third, teachers fourth, and school board was ranked fifth. The community (at large) was ranked last.

Table 11
Means, Standard Deviations, and Rankings
of Education Planners on Importance
of Various Areas

Item (Importance of Various Areas)	Respondents		
	Mean	S. D.	Ranking
1. Rank the following areas in their order of importance from the standpoint of formal planning in your district.			
a. Staff Development	3.388	2.493	3
b. Budget	2.633	2.214	2
c. Curriculum and Instruction	1.551	2.132	1
d. Building Programs	3.980	2.919	4
e. School and Community Relations	5.204	2.091	5
f. Transportation	6.878	1.844	10
g. Federal Programs	6.265	2.439	9
h. Instructional Supportive Services	4.184	1.944	6
i. Research and Evaluation	5.265	2.849	7
j. School Boundaries	5.959	2.791	8

Table 12
 Rankings of Education Planners on
 Importance of Various Tasks

Item (Importance of Various Tasks)	Respondents		
	Mean	S. D.	Ranking
2. Rank the following tasks in their order of importance from the standpoint of formal planning in your district.			
a. Developing Long-Range District Level Plans	3.082	2.532	1
b. Staff Training	4.939	2.212	6
c. Collecting, Organizing and Analyzing Information	3.204	1.768	2
d. Preparation of Proposals	5.408	2.188	7
e. Assisting with Building Level Planning	4.673	1.994	4
f. Developing Short-Range District Level Plans	3.347	1.798	3
g. Trouble Shooting Crises	5.837	2.154	8
h. Coordinating Central Administrative Tasks	4.796	2.179	5

Table 13
 Rankings of Education Planners on
 Personnel Communication/Contact

Item (Importance of Contacts)	Respondents		
	Mean	S. D.	Ranking
3. Rank the following personnel in order of planning time you spend in direct communication/contact with them.			
a. School Board	4.918	1.924	5
b. School Principals	3.082	.997	3
c. Parents	6.041	1.670	6
d. Superintendent	2.020	1.436	2
e. Central Office Staff	1.878	1.201	1
f. Teachers	4.224	1.327	4
g. Community	6.327	1.807	7
h. Students	6.551	1.849	8

Table 14
 Rankings of Education Planners on
 Planning Client Groups.

Item (Importance of Client Groups)	Respondents		
	Mean	S. D.	Ranking
4. Rank the following groups in order in which you view them as your planning client groups.			
a. School Board	4.429	2.466	5
b. School Principals	3.625	1.271	3
c. Parents	5.571	1.555	7
d. Superintendent	2.245	1.985	1
e. Central Office Staff	3.327	1.784	2
f. Teachers	4.245	1.562	4
g. Community (at large)	6.755	1.690	8
h. Students	5.367	2.571	6

In response to the percentage of time the planners spent in certain areas, on the average, the planners spent 34 percent of their time in short-range planning, 23 percent in long-range planning, 22 percent in intermediate planning and 19 percent in crisis planning. Means and standard deviations are presented in Table 15.

Most planners felt their planning operation was in the process of evolving, but considered it a function of administration. As noted in Table 16, this category contained 55 percent of the respondents, while 24 percent felt their operation was a well-defined specific function of administration. There were no responses to the category, a paper shuffling operation.

When asked how many professional staff including yourself, comprise the planning operation, 53 percent of the planners responded only themselves. Other percentages are presented in Table 17.

OBJECTIVE NUMBER FIVE

To ascertain the relationship between descriptive characteristics of the planning structure and planning functions as practiced and perceived by planning incumbents in medium student population (15,000-25,000) school districts in the United States.

A principal components factor analysis with varimax rotation was performed on the 17 items on Part A: Education Planning Functions, and the eight items on

Table 15
 Education Planners Percent of
 Time in Types of Planning

Item (Types of Planning)	Respondents	
	Mean	S. D.
5. What percent of your planning time do you spend in:		
a. Long-Range Planning	23.204	17.145
b. Intermediate Planning	21.959	10.406
c. Short-Range Planning	34.388	19.860
d. Crisis Planning	19.735	15.787

Table 16
 Responses of Education Planners on
 Description of Planning Operation

Item (Description of Planning Operation)	Respondents	
	Frequency	Percent
6. Your planning operation can best be described at this point in time as:		
a. A Function of Administration (definition is still evolving)	27	55.1
b. A "Catch-All" Department for Administrative Problems	12	24.5
c. A Well-Defined Specific Function of Administration	10	20.4
d. A Paper Shuffling Operation	0	0

Table 17
Responses of Education Planners on
Number of Professional Staff

Item (Number of Professional Staff)	Respondents	
	Frequency	Percent
7. How many professional staff, including yourself, comprise the planning operation (full-time equivalent):		
a. Only Myself	26	53.1
b. Two	5	10.2
c. Three	2	4.1
d. Four	6	12.2
e. Five	5	10.2
f. More than Five	5	10.2

Part B: Education Planning Structures on the Questionnaire to Education Planners. The purpose of the factor analysis was primarily to reduce the dimensions of the study by determining which items could be added and studied together and to provide the impetus for further data analysis activities. Data obtained from the 'As It Is' items were utilized in the factor analysis.

Based upon the results of the factor analysis and at the final discretion of the investigator, three factors were identified in Part A and four factors in Part B. The factor names were intended to be descriptive of what the investigator believed the factor encompassed, based upon the individual items which loaded on the factor.

Factor 1 on Part A: Education Planning Functions was named "Planning Policy and Commitment". There was a range of .47 to .80 in the factor loadings. The items and their factor loadings were:

Part A, Factor 1 - Planning Policy and Commitment

<u>Item</u>	<u>Factor Loading</u>
1. Our planning operation is geared primarily toward having an impact on learner outcomes.	.75
2. In our planning operation we do not decide on the content of actual plans as much as we plan and coordinate the total process in helping others to plan.	.68

<u>Item</u>	<u>Factor Loading</u>
3. In our planning operation we view the school district as an organized unit in which planned change in one aspect of operations will trigger changes in other operations.	.76
4. Our planning operation includes a long-range comprehensive or master plan.	.74
5. Our planning operation has the real commitment of our fellow central office administrators.	.76
7. Our planning operation recognizes that lasting change must come from within the organization and involves far-reaching changes in awareness, attitudes, and values on the part of organization members.	.80
8. Our planning operation primarily involves basic policy decisions.	.47
16. Our planning operation seeks to define what our organization wants to do as well as defining the resources and personnel necessary for accomplishing these goals.	.74
17. Our planning operation has the "real" commitment of my superintendent.	.80

Factor 2 seemed to focus upon those functions appropriate to planning styles. The loadings ranged from .53 to .80 on Factor 2, which was named "planning styles". The items and their factor loadings were:

Part A, Factor 2 - Planning Styles

<u>Item</u>	<u>Factor Loading</u>
6. Our planning operation is primarily concerned with the actions of others and often accommodates opportunities for special projects such as are possible through state, federal, and foundation grants.	.58
9. The success of our planning operation is highly dependent on a long-term continuity of planning personnel.	.54
10. Our planning operation is cyclical as it is not necessary to begin our planning process at any specific point.	.55
11. In the final analysis, the results of our planning operation reflect the values of the person(s) who really control our organization.	.80
12. Our planning operation is primarily concerned with efficient resource allocation and utilization.	.56
13. Our planning operation includes in the planning process cooperative arrangements with governmental and social agents.	.53
14. Our planning operation is primarily technical as we are heavily involved in collecting, organizing and analyzing data.	.63

Due to factor loadings and at the final discretion of the investigator, Factor 3 was composed of item fifteen (Through the type and number of alternatives we submit to our superiors we often control decision making). The factor loading for item fifteen with Factor 1 was .19 and

with Factor 2 was .29. Factor 3 was named "Planning and Decision-Making".

Factor 1 on Part B: Education Planning Structures was named "Planning and Personnel Involvement". There was a range of .68 to .87 in the factor loadings. The items and their factor loadings were:

Part B, Factor 1 - Planning and Personnel Involvement

<u>Item</u>	<u>Factor Loading</u>
1. As an education planner, I am directly involved in formulating the decision making structure in our district.	.74
2. As an education planner, I am directly involved in the process of developing broad goals that guide our district.	.87
4. Our planning operation emphasizes the involvement of school personnel at all levels in the planning process.	.68
6. Our planning operation includes the involvement of citizen participation at all levels of the planning process.	.79

Factor 2 was named "Planning Initiator". The items and their factor loadings were:

Part B, Factor 2 - Planning Initiation

<u>Item</u>	<u>Factor Loading</u>
3. As an education planner, I am neither a determiner of goals nor the instigator of programs.	.68

<u>Item</u>	<u>Factor Loading</u>
5. New staff and new funds were allocated at the outset of our planning operation.	.80

Item seven did not load with Factor 1 or Factor 2 and also did not load with the only remaining item. Therefore, Factor 3 was composed of item seven (Our planning operation utilizes outside consultants). The exact factor loading for item seven with Factor 1 was .36 and with Factor 2 was .0009. Factor 3 was named "Planning and Consultants".

Factor 4 was composed of item eight (In our planning operation I report directly to the Superintendent). Factor loadings for item eight with Factor 1 was .47 and with Factor 2 was .54. Factor 4 was named "Planning Organization".

A multivariate analysis of variance (MANOVA) was performed on the linear combination of mean scores for the seven sub-areas (factors) determined through factor analysis. The purpose of the MANOVA was to determine if there were any differences between the 'As It Is' and 'As It Should Be' responses on the linear combinations of the sub-areas.

The means and standard deviations of the mean scores for the seven factors are presented in Table 18. Utilizing Hotelings T^2 , a significant difference was found

Table 18

Means and Standard Deviations for Factors
Multivariate Analysis of Variance

	FACTORS: PART A			FACTORS: PART B			
	Commitment	Styles	Decision- Making	Personnel Involvement	Initiation	Consultants	Organization
'As It Is' (N=49)							
Mean	45.980	32.980	4.469	20.286	8.020	4.245	4.980
S. D.	11.196	7.247	1.781	6.147	3.288	2.036	2.184
'As It Should Be' (N=49)							
Mean	52.714	33.510	4.224	23.327	9.061	4.980	5.816
S. D.	12.730	8.317	1.874	5.673	3.078	1.808	1.564
'As It Is' - 'As It Should Be'							
Mean	-6.7347	-0.5306	.2449	-3.0408	-1.0408	-0.7347	-0.8367
S. D.	8.2557	4.0881	1.6012	4.5137	2.7077	1.7414	1.5725

on the linear combinations of the sub-areas determined through factor analysis ($T^2 = 18.236$; $p < .10$).

Simultaneous confidence intervals were calculated to determine which factors were contributing to the significance of the multivariate initial analysis. When the simultaneous confidence intervals did not span the point zero, the difference between the respective factors was statistically significant ($p < .10$). When the difference did span zero, the difference was not statistically significant. As noted in Table 19, a significant difference existed among Factor 1 (Planning Policy and Commitment) on Part A and Factor 1 (Personnel Involvement) on Part B on the linear combinations of the mean scores.

In analyzing the planning policy and commitment factor (Factor 1, Part A), there was a difference of -6.7347 between the 'As It Is' and 'As It Should Be' response. Since the calculated simultaneous confidence interval does not span zero, the difference between the 'As It Is' and 'As It Should Be' mean scores was significant ($p < .10$). The differences between the 'As It Is' and 'As It Should Be' means for the planning personnel involvement factor (Factor 1, Part B) was -3.0408 . As noted in Table 19 the confidence interval does not span zero; therefore, the difference was significant.

In order to describe the contribution of individual

Table 19
Differences and Simultaneous
Confidence Intervals

	Factors	Differences	Confidence Intervals
Part A	Policy	-6.7347	(-1.7347, -11.7347)*
	Styles	- .5306	(1.9494, -3.0106)
	Decision- Making	.2449	(1.2149, -.7251)
Part B	Personnel Involvement	-3.0408	(-.3108, -5.7708)*
	Initiation	-1.0408	(.5592, -2.6808)
	Consultants	- .7347	(.3153, -1.7847)
	Organization	- .8367	(.1133, -1.7867)

*designates significant differences and
confidence intervals ($p < .10$)

items within a factor to the significant differences observed as a result of the multivariate analysis of variance and the simultaneous confidence intervals, mean differences were computed for items in Factor 1 (Part A) and items in Factor 1 (Part B).

As noted in Table 20, Items A:1 (impact on learner outcomes), A:4 (long-range or master plan), A:5 (commitment of fellow administrators) and A:13 (government and social agency participation) in Factor 1 (Part A) had mean differences of .75 or greater. The 'As It Is' means for the four items ranged from 3.837 to 4.184 indicating that the respondents tended to agree with the items. The 'As It Should Be' means ranged from 4.959 to 5.122 indicating that the respondents agreed with the items. The mean differences on these four items ranged from -1.081 for Item A:1 to -0.817 for Item A:13. The differences between the 'As It Is' and 'As It Should Be' responses of these individual items indicated that the education planners felt they should be doing more than they are presently doing in the planning functions relative to impact on learner outcomes, long-range planning, central office staff commitment, and involvement of governmental and community social agencies.

In analyzing the data from Table 20, for the individual items in Factor 1 (Part B) Item B:6 had a mean

Table 20

'As It Is' and 'As It Should Be' Means and Means Differences for Items in Significant Factors

Items	'As It Is' Mean	'As It Should Be' Mean	Mean Difference
A:1	3.878	4.959	-1.081
A:2	4.612	4.694	-0.082
A:3	4.510	4.918	-0.408
A:4	4.184	5.122	-0.938
A:5	4.082	5.122	-1.040
A:7	4.327	5.061	-0.734
A:8	3.837	4.347	-0.510
A:13	4.163	4.980	-0.817
A:16	4.408	4.939	-0.531
A:17	4.837	4.327	-0.510
B:1	4.122	4.714	-0.592
B:2	4.490	5.000	-0.510
B:4	4.737	5.306	-0.569
B:6	3.959	4.755	-0.796

difference of .796. The 'As It Is' mean was 3.959 and the 'As It Should Be' mean was 4.755 indicating that the respondents agreed with the item. However, the mean difference indicated that the education planners felt that there should be more involvement of citizens at all levels of the planning process than currently exists.

OBJECTIVE NUMBER SIX

To ascertain the relationship between selected descriptive characteristics of the planning structure and planning functions as perceived by school superintendents and practiced by planning incumbents in medium student population (15,000-25,000) school districts in the United States.

In order to accomplish Objective Number Six, selected items in the superintendent's questionnaire were matched with items in the education planner's questionnaire.

Superintendent's Items

I view my planner as a policy planner.

I view my planner as a program planner.

I view my planner as a resource allocation and budget planner.

Education Planner's Items

Our planning operation primarily involves basic policy decisions.

Our planning operation is primarily concerned with the actions of others and often accommodates opportunities for special programs such as are possible through state, federal and foundation grants.

Our planning operation is primarily concerned with efficient resource allocation and utilization.

Superintendent's Items

I view my planner as a facilitator (helps others plan).

I view my planner as a technician planner (collects and analyzes data).

Education Planner's Items

In our planning operation we do not decide on the content of actual plans as much as we plan and coordinate the total process in helping others to plan.

Our planning operation is primarily technical as we are heavily involved in collecting, organizing and analyzing data.

The chi-square test and accompanying phi coefficient were utilized to ascertain the degree and direction of association between the superintendent's and planner's responses to the planning function and structure items. A significant chi-square indicates a significant degree of association between the way the superintendents and planners viewed the role of the planner. The sign of the phi coefficient indicates the direction of the association, whether the association was positive or negative.

Contingency tables and results of the chi-square tests are presented in Tables 21 through 25. Due to small cell sizes, 2 X 2 contingency tables were developed by coding a response of 1, 2, or 3 as "disagree" and a response of 4, 5, or 6 as "agree". Responses from the 'As It Is' column from the planner's questionnaire were utilized in chi-square tests.

A review of the five tables (21-25) reveals that the chi-square test for the "policy planner" item was

Table 21

Contingency Table and Chi-Square
Value on Policy Planner

		Planners		
		Agree	Disagree	
Superintendents	Disagree	19 (39%)	3 (6%)	22 (45%)
	Agree	12 (24%)	15 (31%)	27 (55%)
		31 (63%)	18 (37%)	49 (100%)

$$\chi^2 = 9.17^*$$

$$\phi = -.43$$

*statistically significant ($p < .10$)

Table 22

Contingency Table and Chi-Square
on Program Planner

		Planners		
		Agree	Disagree	
Superintendents	Disagree	11 (23%)	5 (10%)	16 (33%)
	Agree	25 (51%)	8 (16%)	33 (67%)
		36 (73%)	13 (27%)	49 (100%)

$$\chi^2 = .27$$

$$\phi = .07$$

Table 23

Contingency Table and Chi-Square Value on
Resource Allocation and Budget Planner

		Planners		
		Agree	Disagree	
Superintendents	Disagree	9 (18%)	8 (16%)	17 (35%)
	Agree	21 (43%)	11 (23%)	32 (65%)
		30 (61%)	19 (39%)	49 (100%)

$$\chi^2 = .75$$

$$\phi = .12$$

Table 24

Contingency Table and Chi-Square
Value on Facilitator Planner

		Planners		
		Agree	Disagree	
Superintendents	Disagree	3 (6%)	0 (0%)	3 (6%)
	Agree	37 (76%)	9 (18%)	46 (94%)
		40 (82%)	9 (18%)	49 (100%)

$$\chi^2 = .72$$

$$\phi = -.12$$

Table 25

Contingency Table and Chi-Square Value
on Technician Planner

		Planners		
		Agree	Disagree	
Superintendents	Disagree	5 (10%)	2 (4%)	7 (14%)
	Agree	23 (47%)	19 (39%)	42 (86%)
		28 (57%)	21 (43%)	49 (100%)

$$x^2 = .68$$

$$\phi = -.12$$

significant ($p < .10$). The phi coefficient (-.43) indicated a significant association between the responses of the superintendents and the planners but in an inverse direction. In other words, when the superintendents "agreed" the planners "disagreed" and when the superintendents "disagreed" the planners "agreed".

FURTHER ANALYSIS

A further analysis, not required in the objectives of the study, was conducted by relating selected demographic variables in Section III: School District Characteristics with the response of the education planners to the twenty-five items in Part A and Part B of Section I: Planning Functions and Structures. The chi-square test was utilized to ascertain the degree of association between the selected demographic variables and the planning function and structure items.

For the analysis, item two (per pupil cost), item four (school district classification) and item five (enrollment) were selected from Section III: School District Characteristics. Contingency tables and results of the chi-square test for item two (pupil cost) are presented in Tables 26 through 50 and included in Appendix G; for item four (school district classification) in Tables 51-75 included in Appendix H; and for item five

(enrollment) in Tables 76-100 included in Appendix I.

Item two (per pupil cost) responses were compared to the 25 items in Part A and Part B of Section I: Planning Functions and Structures to determine significant associations between demographic variables and planners' responses. The results were as follows:

<u>Table Number</u>	<u>Item Description</u>	<u>Per Pupil Cost</u>	
		<u>Agree</u>	<u>Disagree</u>
35	Our planning operation is cyclical as it is not necessary to begin our planning process at any specific point.	more than \$1200.00	less than \$1200.00
39	Our planning operation is primarily technical as we are heavily involved in collecting, organizing and analyzing data.	less than \$1200.00	more than \$1200.00
43	As an education planner, I am directly involved in formulating the decision making structure in our district.	less than \$1200.00 more than \$1200.00	

Eleven items on the planners' questionnaire demonstrated a high degree of agreement with the demographic variables--school district classification. The following summary identifies the table numbers and item description for each of the eleven significant associations.

<u>Table Number</u>	<u>Item Description</u>	<u>District Classifications</u>		
		<u>Agree</u>	<u>Disagree</u>	<u>Neutral*</u>
52	Plan and coordinate the total process in helping others to plan.	City Suburban	Rural	

Table Number	Item Description	District Classifications		
		Agree	Disagree	Neutral*
53	Planned change in one aspect of operations will trigger changes in other operations.	City Suburban	Rural	
57	Lasting change comes from within changes in awareness, attitudes, and values of organization members.	Suburban	City Rural	
58	Planning operation involves basic policy decisions primarily.	City Suburban	Rural	
60	Planning operation is cyclical--no specific beginning point in planning.	Suburban	City Rural	
61	Results of planning operation reflect values of person(s) controlling organization.	City Suburban	Rural	
67	Planning operation has "real" commitment of superintendent and board.	City Suburban		Rural
68	Involved in formulating decision-making structure in district.	City Suburban	Rural	
69	Involved in developing broad goals that guide in district.	City Suburban	Rural	
70	Neither a determiner of goals nor an instigator of programs.		City Suburban Rural	
72	New staff and funds allocated at outset of planning operation.	Suburban	Rural	City

*indicates numbers of agree and disagree responses were equal

Item five (enrollment) responses were compared to the 25 items on the planners' questionnaires and tabled results are presented in Appendix I. Four items on the questionnaire demonstrated a significant degree of agreement with the enrollment variable. The following summary depicts the results of this analysis of significant associations.

Table Number	Item Description	Student Enrollment	
		Agree	Disagree
85	Our planning operation is cyclical as it is not necessary to begin our planning process at any specific point.	Declining Remaining Same	Increasing
90	Through the type and number of alternatives we submit to our superior(s) we often control decision-making.	Declining Remaining Same	Increasing
94	As an education planner, I am directly involved in the process of developing broad goals that guide our district.	Increasing Declining Remaining Same	
98	Our planning operation includes the involvement of citizen participation at all levels in the planning process.	Declining Remaining Same	Increasing

GENERAL DISCUSSION OF THE FINDINGS

A total of 223 questionnaires were mailed to superintendents across the country. Although the return was reasonably high (74 percent responded) only 30 percent

of those responding indicated they had a formal planner, other than themselves. It is possible that the 59 superintendents who did not respond failed to do so because they did not have planning incumbents, and since only 49 of the 164 who responded did have planners, the indication is that the position of planner, and, by implication, a formal planning operation are really not very common in medium sized school districts. This could be due to current economic pressures on school systems or to a lack of information about or concern for educational planning as a formal process. It may be that most school systems are incremental in their planning, moving from one situation to another, depending on local needs, finances and resources available at a given time.

Seventy-eight percent of the superintendents responding indicated that they had initiated the planning operation based on a perceived local need. The literature and the observations of the researcher supported the idea that most of the formal planning operations in public school systems had been initiated due to pressure from federal and state government agencies. There are two possible explanations for this discrepancy between the literature and the respondents. First, it may be that superintendents are reluctant to admit that they are strongly influenced (or even controlled) by agencies or

forces outside their own school system and community. Secondly, it may reflect the tendency on the part of a superintendent to view outside factors only as assistance or support relative to local needs. Therefore, any project or program becomes "local" in his perception once instigated in his particular system. Thus, whatever demands stem from such programs are "local needs".

The findings of this research indicated that the concept of planning as it is perceived in public schools is often aligned to the ideas and concepts that appeared in the literature. However, there were a few items in the questionnaire which drew somewhat unexpected responses from planners. Several such responses were related to the role of the superintendent and to decision-making in the system.

Planners indicated that they felt the planning operation should be more involved in basic policy decisions. They responded that the current planning operation reflected the values of the person(s) (i.e. Superintendent) who control the school system more than he should. Planners indicated that the superintendent should have less of a "real" commitment than he now does. Planners further indicated the significance of the superintendent by placing him first in a rank order listing of whom they viewed to be their client group. The major explanation

for these responses must be that planners feel that the superintendent, or person(s) in control, exerts too strong an influence on the decision-making authority and that they should be more involved in instigation of programs and in the development of goals than they now do. It may be that planners felt they would be less affected by social and political pressures within a system than is the superintendent and that they could plan in an unbiased manner.

Superintendents responded that they tended to feel that the planning operation had been of value to them. This could reflect a sincere belief in the value of the planning operation or it could indicate that the planner was carrying out the wishes of the superintendent.

Planners stated that they spent most of their planning time working with the central staff. Yet they indicated that there should be a higher commitment on the part of fellow central office administrators. An explanation for this might be that central office staff members view the planner as an extension of the superintendent whose main role is to project the wishes of the superintendent. Such a perception, on the part of central staff members, could lead to covert actions against the planning operation. They may perceive the planner as

making decisions, or instigating programs which they feel should be their responsibility.

Planners ranked their most important task to be planning in the areas of curriculum and instruction. Yet they did not see that the planning operation was really geared primarily to having impact on learner outcomes. One possible explanation for this is that planners are more involved in administrative procedures and activities than they are in matters related to planning for measurable achievement in learner outcomes. Another explanation, indicated by the findings in this research, is that the planning operation is relatively new and there has not yet been enough time to determine the effect such an operation has on direct instructional outcomes.

In regard to long-range planning, planners ranked this as their most important task. However, they stated that they spend only 23 percent of their time working on long-range plans and they felt that their planning operations should have developed more long-range comprehensive plans than they now have. An explanation for this discrepancy in attitude and action might be that planners are functioning more as agents to support the wishes of the superintendent and that much effort goes into short-term planning, and problem solving relative to needs of the moment rather than to the development of long-range

goals. However, again the fact that planning operations are fairly new in these systems may support the explanation that there really has not been adequate time to develop a long-range comprehensive or master plan based on a needs assessment and meaningful technical data concerning the system's needs and potentials.

Finally, the data revealed that planners felt that the actual practice of planning was not "as it should be" relative to the ideas and concepts basically delineated in the literature. There are several explanations which may, in varying degrees, be related to this. First, the findings indicated that planners currently employed did not have extensive professional training as planners. Therefore, although the professional expertise of the field may be in the process of growing, as yet planning operations may not be staffed by highly trained professionals and as a consequence such operations do not function as projected in theory. A second explanation is that the planning operation cannot function as planners perceive it should because of undue influence, pressure or control on the part of the superintendent or person(s) in authority. It may be that such individuals use the planning operation to further strengthen their own wishes to develop goals as they perceive they should be; or it may be that school systems, superintendents and other

administrators do not really understand the role of the planner nor the purposes and functions of a planning operation. And, again, the short duration of their existence might explain the fact that planning operations in public school systems appear to be in their formative stages of development.

DISCUSSION OF FINDINGS RELATED TO LITERATURE

This research supported the view presented in the literature that formal planning does not yet have a strong commitment in public school systems (Hartley, 1968; Higginson and Love, 1973 and Weiss, 1973). Of the superintendents who responded only 30 percent indicated that their school system had a formal planner (other than themselves). Most superintendents perceived that a local felt need was the motivation for formal planning rather than an outside force such as a State mandate or the federal government, as was indicated in the literature (Campbell, 1968; Eidell and Nogle, 1970).

Data based on responses from superintendents (Table 1: No. 3:d) strongly supported the concept of the planner as a facilitator (Rabinovitz, 1967; MacCullough, 1964; Summer, 1961 and Duhl, 1967) rather than as a policy maker. Planners also indicated a high degree of agreement with this (Table 10: Part A, Item 2; Table 24). However,

superintendent responses to their feeling concerning the value of the planning operation did not measure up to the degree of support needed from the chief executive and central administrators delineated in the literature (Brown, 1972; Newell, 1963; Catanese and Steiss, 1970 and Devons, 1951) nor as expressed by planners themselves (Table 10: Part A, Items 5 and 17).

The data supported the description appearing in the literature that the planning position is of relatively recent origin (MacCullough, 1964; Summer, 1961; Catanese and Steiss, 1970) in that most planning organizations have been operative for less than five years. However, planners did not agree that a "long-term continuity" of planning personnel (Table 10: Part A, Item 9) was as important as it was perceived to be in their system now nor as significant as was indicated in the literature (Catanese and Steiss, 1970).

Although the literature (Gold, 1965) reported that promotion of individuals from lower levels within the system who were not really trained in planning has not proven successful, this research found a strong tendency to promote principals and other central office staff to the planning post (Tables 5 and 9). Most planners held degrees or have had formal course work above the masters level (Table 6), but the content of this training for the

position (Tables 7 and 8) was diverse. This was anticipated in the literature review (Rabinovitz, 1967; Thomas, 1974; Pack, 1974; Doland and Parker, 1962; Bolan, 1967; MacCullough, 1964; Summer, 1961 and Duhl, 1967). Support for a planning staff was found in the literature outside the field of education (Schaffer, 1965; Catanese and Steiss, 1970). Pack (1974) stated that one full-time planner should be sufficient for most school districts. More than half the respondents indicated they were the only member of the professional staff (Table 17) although they indicated they felt there should have been more provision for funds and staffing at the outset (Table 10: Part B, Item 5).

The literature projected the concept that planners should be located close to the top decision-makers in the organization (Temkin, et al, 1975; Pack, 1974) and the planners supported this, indicating a feeling that they should report directly to the superintendent (Table 10: Part B, Item 8), even though they did not feel they should "control decision making" (Table 10: Part A, Item 15). Planners did not feel they should determine goals nor instigate programs (Table 10: Part B, Item 3). However, planners apparently felt that they should have more influence in final decision-making than they now have (Table 10: Part A, Item 8; Part B, Item 1).

The literature was rich in description of the theory of a systems approach in which consideration is given to the relationship of all parts of an organization and their affect on one another in the planning process (Thomas, 1974; Lehmann, 1968; Sagan, 1972; Silvern, 1972; Barbee, 1973; Cook, 1967; Brieve, 1973 and Rudwick, 1969). Planners indicated considerable agreement with this in several responses (Table 10: Part A, Items 2, 3, 6, 7 and 16; Part B, Item 4).

Johnston (1975) defined four basic rationalities which strongly influence decision-making. These included technical, economic, social and political considerations. Planners did not perceive their operation as being strongly technical nor did they feel it should be (Table 10: Part A, Item 14). Planners further indicated that they were not as strongly concerned with economic factors as they felt they should be (Table 10: Part A, Item 12), but responses did not indicate that this was a significant concern. Planner responses indicated more support for awareness of the influence of social and political factors in the planning operation.

The literature strongly supported the role of the planner as a catalyst helping others to plan (Argyris, 1953; Newell, 1963; Payne and Kennedy, 1958). Planners' responses reflect agreement with this (A:2). Both the

literature (Argyris, 1953; Newell, 1963; Payne and Kennedy, 1958; Thomas, 1974 and Temkin, et al, 1975) and the respondents supported the involvement of school personnel (A:7, B:4) in the planning process. However, the literature consistently supported the concept of community participation (Banghart and Trull, 1973; Blakely, 1975; Humphreys, 1975). Planners indicated that the amount of citizen and other agency participation (A:13, B:6) was not as high as they perceived that it should be. Although the literature indicated growth in the utilization of outside consultants (Pack, 1975) there was not strong agreement on the values of this from planners (Table 10: Part B, Item 7).

The literature review supported the theory of long-range planning (Chase and Clark, 1974; Goldman, 1969; Morphet and Jesser, 1969; Sanders, 1961; Ziegler, 1970 and Bolan, 1967). However, there was no evidence in the literature of actual master plans existing in specific educational institutions at this time. This was reflected in the responses of planners indicating a low occurrence of actual long-range planning (Table 12: No. 2:a) contrasted with a high response indicating agreement that there should be long-range planning (Table 10: Part A, Item 4).

In general, the findings in this research correlated very highly with information reported in the

review of the literature concerning the current status of planning in educational institutions. The most noticeable discrepancy related to the view that superintendents felt that perceived local needs had been most influential in the development rather than the indications that federal and state programs and/or mandates had created such an impetus. Both groups of respondents, superintendents and planners tended to agree with statements concerning planning functions and structures which were based on the literature.

Chapter 5

SUMMARY, CONCLUSIONS, IMPLICATIONS AND RECOMMENDATIONS

SUMMARY

The study was based on the need for descriptive information on comprehensive planning as it currently exists in educational institutions and to make the information available to the profession. The problem of this study was to describe the structural and functional arrangements of formal planning organizations in education as perceived by superintendents and as practiced and perceived by planning incumbents in medium student population school districts (15,000-25,000) in the United States.

The six objectives of the study were to ascertain selected descriptive characteristics within the selected school districts including:

1. Characteristics of the planning structure and planning functions as perceived by school superintendents;
2. Professional and selected personal characteristics of the planning incumbent;
3. Characteristics of the planning structure and planning functions as practiced by the planning incumbent;
4. Characteristics of the planning structure and

planning functions as perceived by the planning incumbent;

5. Relationship between selected characteristics of the planning structure and planning functions as practiced and perceived by the planning incumbent; and,

6. Relationship between selected characteristics of the planning structure and planning functions as perceived by school superintendents and practiced by planning incumbents.

The research procedure followed the general methodology applicable to descriptive research. A survey instrument was developed based on data derived from the review of the literature and the researcher's experience as an education planner. It was then pilot tested with selected superintendents, planning incumbents and consultants and revised accordingly. The survey instrument consisted of two questionnaires. The first consisted of one page, to be answered by the superintendent, and the second questionnaire contained three sections and was to be answered by the planning incumbent. Questions on the instrument were designed to collect information relative to the six stated objectives of this study.

Two hundred and twenty-three questionnaires were mailed and 164 (74 percent) of the superintendents responded. Of this number, 49 (30 percent) responded that they did have planners and 49 planners' questionnaires

were returned. The data were analyzed and following are findings relative to the stated objectives:

Objective Number One

School superintendents perceived the role of the planner to be that of a facilitator and they tended to agree that their planning operation had been of value to them. Superintendents felt that a perceived local need had prompted them to initiate their planning operation.

Objective Number Two

Specific characteristics of the planner included:

1. Director of Planning was most common title;
2. More than 63 percent of the planners had been in that position three years or less;
3. Most planners had been promoted from central office or principal positions within the system;
4. Eighty-eight percent of the planners had academic training above the Masters Degree; and,
5. Sixty-seven percent of the planners had their highest degree in educational administration, followed by 14 percent in curriculum and instruction. However, 57 percent reported that they had had formal training in planning.

Objective Number Three

Based on 25 descriptions of the functions and

structures of educational planning relative to the way they are practiced, the respondents expressed the following:

1. Planners "agreed" or "tended to agree" with 24 of 25 descriptions relative to the planning operation presented in Section I: Part A and B on the questionnaire. They reported agreement on four items (including helping others to plan, systems concept, commitment of superintendent and involvement of school personnel) and a tendency to agree on 20 items in describing the planning functions and structures as they exist in their system. Planners tended to disagree with one item which stated that the planner was neither a determiner of goals nor the instigator of programs.

2. Planners felt that the most important areas of formal planning (in rank order) included curriculum and instruction, budget and staff development. They ranked their three most important tasks to be developing long-range district plans, collecting, organizing and analyzing data, and developing short-range district plans.

3. Planners reported that they spent most of their planning time with the central staff, followed by the superintendent and school principals. They viewed their planning clients, in rank order, as being the superintendent, central office staff and school principals.

4. Planners reported that they spend the largest percentage (35 percent) of their planning time on short-range planning. Long-range planning was reported as taking 22 percent of their planning time while 20 percent of their time was spent on intermediate planning. Twenty percent of their planning time was spent on crisis planning.

5. More than half (55 percent) of the planners responding felt the definition of their planning operation was still evolving, 25 percent saw their operation as a "catch-all", while 20 percent felt that their planning operation was well-defined.

Objective Number Four

Based on 25 descriptions of the functions and structures of educational planning relative to the manner in which they perceived "they should be", the respondents expressed the following:

1. Planners agreed with 15 out of 25 items with means ranging from 4.5 to 5.3. Seven of these were above the mean of 5.0 and included Items A:4 (long-range or master plan), A:5 (commitment of central staff), A:7 (change in attitude of organization members), A:13 (cooperation with other agencies), A:17 (commitment of superintendent), B:2 (developing broad goals) and B:4 (involvement of school personnel at all levels of planning).

2. Nine items fell into the "tend to agree"

category, while only one item was ranked in the "tend to disagree" category. This was Item B:3 which related to the planner as neither a determiner of goals nor an instigator of programs.

3. The greatest "as it should be" mean (5.3) was for Item B:4 which supported the emphasis of involvement of school personnel at all levels in the planning process.

Objective Number Five

Based on the questionnaire, planners' responses regarding their views of their planning operation as it is practiced ("as it is") and perceived ("as it should be") were as follows:

1. Planners ranked 19 of 25 items higher in the 'As It Should Be' category as compared to the 'As It Is' category.

2. Six items were ranked slightly lower in the 'As It Should Be' category compared to the 'As It Is' and these included Items A:9 (importance of long-term commitment of planning personnel), A:11 (results reflect values of top authority), A:12 (concern with efficient resource allocation and utilization), A:14 (planning operation as primarily technical), A:15 (control of decision-making), and A:17 (commitment of superintendent).

3. A significant difference existed among Factor 1 (planning policy and commitment) on Part A and Factor 1

(personnel involvement) on Part B on the linear combination of the mean scores. The items that were identified as being the major contributors within the significant factors were A:1 (impact on learner outcomes), A:4 (long-range planning), A:5 (commitment of fellow administrators), A:13 (including outside agencies) and B:6 (citizen participation). In all cases planners felt that more emphasis should be placed on these particular aspects of planning.

Objective Number Six

In order to ascertain the association between the perception of superintendents concerning planning structure and functions compared to the manner in which planners practiced, five items from the superintendent's questionnaire were "matched" with five items from the planner's questionnaire:

1. Policy Planner,
2. Program Planner,
3. Resource Allocation and Budget Planner,
4. Facilitator Planner, and
5. Technician Planner.

The data indicated that there was a significant negative association between the responses of the superintendents and planners for the "policy planner" item. No significant association was found for the other four items.

CONCLUSIONS

On the basis of the data in this research, the following conclusions were drawn relative to the objectives of the study:

1. Education planning is an "evolving" but not yet a major aspect of the school districts surveyed.

2. The role of "facilitator" or helping others to plan was generally agreed upon by superintendents as the role of the planner.

3. Planning operations in public school systems probably are not under the leadership of personnel who could be considered "professionally trained" in planning, nor do operations have long enough service and experience to adequately assess their impact change at this time.

4. The superintendent tends to be seen as the key factor in the success or failure of the planning process.

5. There is general agreement among planners as to similarity in regard to current practices in planning.

6. Planning, as it is practiced is not "as it should be", although there is general agreement among planners on what "should be" in terms of planning functions and structures.

7. Commitment of central office administrators, other than the planner, is not as high as is needed for success of the planning function.

8. There was only slight association in the perception of the role of the planner as viewed by superintendents and planners.

IMPLICATIONS

1. Based on some evidence in this study that only a few people trained in planning were serving as education planners, the implications are that planning operations in public school systems are not professional planning organizations of the nature delineated within the literature. This indicates a need for serious consideration concerning in-service strategies and organizational development procedures to strengthen the expertise and position of individuals currently employed as education planners.

2. This study further indicated two possibilities concerning the employment of education planners:

- A. There is a possible reluctance on the part of school systems to look outside the system for selection of leadership personnel even if such positions have unique qualifications, and/or
- B. There is possibly a shortage of trained planners available to fill these positions.

3. The data in this study seemed to indicate that the planning operation strongly reflected the expectations of the key leader (i.e. Superintendent) both in the tasks performed by the planners and in the outcomes of the

planning process. This would imply that superintendents need a richer awareness of the need for planning and a more realistic picture of what is involved and what it can accomplish.

4. The review of the literature and the findings of this research indicated that there is no agreement on the qualifications and the role of the educational planners that is generally recognized and acknowledged by education practitioners. This implies the need for the formulation of personnel policies, job descriptions and more formal professional competencies relative to the position of education planning.

5. Finally, the data implied that more involvement in educational planning activities was needed on the part of the public, including individuals within the community as well as professional and social organizations.

RECOMMENDATIONS FOR FURTHER RESEARCH

On the basis of the data in this study, conclusions drawn from this, from the literature and the personal experience of the researcher as a planner in a public school system, the following recommendations are presented:

1. This study, with appropriate modification, be duplicated in systems with student populations larger than 25,000. Such a recommendation is based on the assumption that such systems would have more formal or more

sophisticated planning organizations and that they would be more likely to have employed professional planners over a longer period of time than have smaller systems.

2. It is recommended that a comprehensive study be made to locate institutions which offer professional programs in educational planning, to identify the content of such programs and to ascertain the availability of professional planners (graduates of identified programs) for employment in public school systems.

3. Additional study should be conducted to ascertain desired personal and professional characteristics and skills for education planners. Such a study should include input from professionals involved in the training of planners, superintendents and individuals from all levels of personnel within public school systems, as well as planners themselves.

4. Further research, on a longitudinal basis, should be conducted to ascertain and document the affect of an education planner as a change agent.

Although it was not the purpose of this study to project an ideal or theoretical model for educational planning, the findings within the study and the implementation of the above recommendations (further research) would be beneficial to the development of such a model.

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APPENDIXES

APPENDIX A
LETTER TO SUPERINTENDENTS SERVING AS
EVALUATORS OF PILOT-INSTRUMENT



Roanoke City Public Schools

Office of the Superintendent
P. O. Box 13145, Roanoke, Virginia 24031

40 Douglas Avenue, N.W.
(703)981-2381

February 2, 1976

Mr. XXX, Superintendent
XX Public Schools
20 South Street
City, State 10000

Dear Mr. XXX:

We in the Roanoke City Schools have instituted an administrative department whose major activities are related to formal planning. To better organize and execute our planning operation we are conducting a study on formal planning with other school districts of comparable size in the United States.

To gather information for our study we have developed two questionnaires--Questionnaire to Superintendents and Questionnaire to Education Planners. Prior to sending questionnaires, we are conducting pilot-testing.

In this regard I have enclosed a copy of the transmittal letter, a copy of the Questionnaire to Superintendents, and a copy of the Questionnaire to Education Planners. It would be very helpful to us if you would:

- (1) read the transmittal letter and note any suggested improvements,
- (2) complete the Questionnaire to Superintendents and document your comments in regard to:
 - a. overall readability
 - b. overall format
 - c. overall substance
 - d. understanding of directions
 - e. format for marking responses
 - f. individual item substance

We merely included a copy of the Questionnaire to Education Planners in order to give you a complete picture of our study. It is not necessary for you to critique it. Thank you very much for your help.

Sincerely,

David L. Lusk, Director
Planning and Evaluation

APPENDIX B

LETTER TO EDUCATION PLANNERS AND EDUCATION CONSULTANTS
SERVING AS EVALUATORS OF PILOT-INSTRUMENT



Roanoke City Public Schools

Office of the Superintendent
P. O. Box 13145, Roanoke, Virginia 24031

40 Douglas Avenue, N.W.
(703)981-2381

February 2, 1976

Mr. XXX
Education Consultant
XXX Systems Corporation
P.O. Box 100
City, State 10000

Dear Mr. XXX:

In accordance with our discussion of this date, enclosed you will find two copies of the Questionnaire to Education Planners. We are proposing to utilize the questionnaire in a study we are conducting on formal planning in education.

Prior to sending the questionnaire to all education planners in school districts of comparable size in the United States, we are conducting a pilot-testing. It would be most helpful if you would:

- (1) complete the first copy of the questionnaire and document the time required,
- (2) complete the second copy of the questionnaire and document your comments in regard to:
 - a. overall readability
 - b. overall format
 - c. overall substance
 - d. understanding of directions
 - e. format for marking responses
 - f. individual item substance

Please feel free to make your comments in any form (e.g. letter, memorandum, directly on questionnaire, etc.). Thank you for your help.

Sincerely,

David L. Lusk, Director
Planning and Evaluation

DLL/vj

Enclosure

APPENDIX C
EVALUATORS OF PILOT-INSTRUMENT

EDUCATION PROFESSIONALS WHO EVALUATED PILOT QUESTIONNAIRE

Superintendents

Mr. Arnold R. Burton
 Division Superintendent
 Roanoke County Public Schools
 526 College Avenue
 Salem, Virginia 24153

Mr. R. E. Butt
 Division Superintendent
 Loudoun County Public Schools
 20 Union Street
 Leesburg, Virginia

Education Planners

Dr. Arthur A. Welch
 Director of Planning
 Loudoun County Public Schools
 20 Union Street
 Leesburg, Virginia 22075

Mr. Gilmour A. Wylie
 Director of Research
 and Planning
 Newport News Public Schools
 P.O. Box 6130
 Newport News, Virginia 23606

Education Consultants

Mr. Anthony W. Cooke
 Systems Consultant
 EPIC Systems Corporation
 P.O. Box 8652
 Richmond, Virginia 23226

Dr. Allan W. Gibson
 Vice President for
 Educational Systems,
 Multi-Media Associates, Inc.
 P.O. Box 13052
 Tucson, Arizona 85732

APPENDIX D
COVER LETTER ACCOMPANYING QUESTIONNAIRES



Roanoke City Public Schools

Office of the Superintendent
P. O. Box 13145, Roanoke, Virginia 24031

40 Douglas Avenue, N.W.
(703)981-2381

February 17, 1976

Dr. X X X , Superintendent
X X School District
300 South C Street
City, State 11111

Dear Dr. X:

We in the Roanoke City Schools have instituted an administrative department whose major activities are related to formal educational planning. To better organize and execute our planning operation we are seeking information from other school districts of comparable size who may have a formal planning operation.

I know it is budget time and I know you are as busy as I am, but I feel this research can be of help to both of us. It would be most helpful if you would:

- (1) complete and return the one page Questionnaire to Superintendents,
- (2) then pass the Questionnaire to Education Planners to your planner to complete and return.

At your request, I shall be happy to share the results of this study with you. With best wishes for the remainder of the school year, I am

Sincerely,

M. D. Pack, Ed. D.
District Superintendent

MDP/vj

Enclosures

APPENDIX E
QUESTIONNAIRE TO SUPERINTENDENTS

QUESTIONNAIRE TO SUPERINTENDENTS

1. Do you have a formal planner (other than yourself) in your district, that is, a person who has planning as one of his major responsibilities?
 a. Yes b. No

IF NO, PLEASE STOP AND RETURN THIS QUESTIONNAIRE IN THE SELF-ADDRESSED STAMPED ENVELOPE.

2. If yes, please check (✓) your education planner's formal title:

- a. Associate Superintendent for Planning
 b. Assistant Superintendent for Planning
 c. Director of Planning
 d. Coordinator of Planning
 e. Other (specify) _____

Please indicate the extent to which each statement below characterizes your feelings as a Superintendent by circling the appropriate response at the right of each statement.

6 = strongly agree 4 = tend to agree 2 = disagree
 5 = agree 3 = tend to disagree 1 = strongly disagree

3. I view my planner as:

- | | | | | | | |
|--|---|---|---|---|---|---|
| a. a policy planner | 1 | 2 | 3 | 4 | 5 | 6 |
| b. a program planner | 1 | 2 | 3 | 4 | 5 | 6 |
| c. a resource allocation and budget planner | 1 | 2 | 3 | 4 | 5 | 6 |
| d. a facilitator (help others plan) | 1 | 2 | 3 | 4 | 5 | 6 |
| e. a technician planner (collects and analyzes data) | 1 | 2 | 3 | 4 | 5 | 6 |

4. I feel our planning operation has been of value to me and my total operation. 1 2 3 4 5 6

5. What prompted you to initiate your planning operation: [check (✓) one]

- a. State mandate
 b. a perceived local need
 c. operation of local federal programs
 d. a key issue in district (please specify) _____

6. Would you like to have the results of the Roanoke City study? [check (✓) one]: a. Yes b. No

PLEASE PLACE THIS PAGE 'QUESTIONNAIRE TO SUPERINTENDENTS' IN THE ATTACHED SELF-ADDRESSED STAMPED ENVELOPE AND RETURN IT.

PLEASE PASS ALONG THE ENCLOSED 'QUESTIONNAIRE TO EDUCATION PLANNER' TO YOUR PLANNER AND ASK HIM TO COMPLETE IT AND RETURN IT.

THANKS AGAIN!

APPENDIX F
QUESTIONNAIRE TO EDUCATION PLANNERS

QUESTIONNAIRE TO EDUCATION PLANNERS

SECTION I: EDUCATION PLANNING FUNCTIONS AND STRUCTURES

Please indicate the extent to which each item below characterizes your feelings by circling the appropriate response in the "As It Is" column and by circling the appropriate response in the "As It Should Be" column. Be sure to circle a response in each column according to the following:

6 = strongly agree
5 = agree

4 = tend to agree
3 = tend to disagree

2 = disagree
1 = strongly disagree

PART A: EDUCATION PLANNING FUNCTIONS	"As It Is"						"As It Should Be"					
1. Our planning operation is geared primarily toward having an impact on learner outcomes.	1	2	3	4	5	6	1	2	3	4	5	6
2. In our planning operation we do not decide on the content of actual plans as much as we plan and coordinate the total process in helping others to plan.	1	2	3	4	5	6	1	2	3	4	5	6
3. In our planning operation we view the school district as an organized unit in which planned change in one aspect of operations will trigger changes in other operations.	1	2	3	4	5	6	1	2	3	4	5	6
4. Our planning operation includes a long-range comprehensive or master plan.	1	2	3	4	5	6	1	2	3	4	5	6
5. Our planning operation has the real commitment of our fellow central office administrators.	1	2	3	4	5	6	1	2	3	4	5	6
6. Our planning operation is primarily concerned with the actions of others and often accomodates opportunities for special projects such as are possible through state, federal, and foundation grants.	1	2	3	4	5	6	1	2	3	4	5	6
7. Our planning operation recognizes that lasting change must come from within the organization and involves far-reaching changes in awareness, attitudes, and values on the part of organization members.	1	2	3	4	5	6	1	2	3	4	5	6
8. Our planning operation primarily involves basic policy decisions.	1	2	3	4	5	6	1	2	3	4	5	6
9. The success of our planning operation is highly dependent on a long-term continuity of planning personnel.	1	2	3	4	5	6	1	2	3	4	5	6
10. Our planning operation is cyclical as it is not necessary to begin our planning process at any specific point.	1	2	3	4	5	6	1	2	3	4	5	6
11. In the final analysis, the results of our planning operation reflect the values of the person(s) who really control our organization.	1	2	3	4	5	6	1	2	3	4	5	6
12. Our planning operation is primarily concerned with efficient resource allocation and utilization.	1	2	3	4	5	6	1	2	3	4	5	6

SECTION I: EDUCATION PLANNING FUNCTIONS AND STRUCTURES

PART A: EDUCATION PLANNING FUNCTIONS (continued)	"As It Is"	"As It Should Be"
13. Our planning operation includes in the planning process cooperative arrangements with governmental and social agencies.	1 2 3 4 5 6	1 2 3 4 5 6
14. Our planning operation is primarily technical as we are heavily involved in collecting, organizing, and analyzing data.	1 2 3 4 5 6	1 2 3 4 5 6
15. Through the type and number of alternatives we submit to our superior(s) we often control decision-making.	1 2 3 4 5 6	1 2 3 4 5 6
16. Our planning operation seeks to define what our organization wants to do as well as defining the resources and personnel necessary for accomplishing these goals.	1 2 3 4 5 6	1 2 3 4 5 6
17. Our planning operation has the "real" commitment of my superintendent.	1 2 3 4 5 6	1 2 3 4 5 6
PART B: EDUCATION PLANNING STRUCTURES	"As It Is"	"As It Should Be"
1. As an education planner, I am directly involved in formulating the decision making structure in our district.	1 2 3 4 5 6	1 2 3 4 5 6
2. As an education planner, I am directly involved in the process of developing broad goals that guide our district.	1 2 3 4 5 6	1 2 3 4 5 6
3. As an education planner I am neither a determiner of goals nor the instigator of programs.	1 2 3 4 5 6	1 2 3 4 5 6
4. Our planning operation emphasizes the involvement of school personnel at all levels in the planning process.	1 2 3 4 5 6	1 2 3 4 5 6
5. New staff and new funds were allocated at the outset of our planning operation.	1 2 3 4 5 6	1 2 3 4 5 6
6. Our planning operation includes the involvement of citizen participation at all levels in the planning process.	1 2 3 4 5 6	1 2 3 4 5 6
7. Our planning operation utilizes outside consultants.	1 2 3 4 5 6	1 2 3 4 5 6
8. In our planning operation I report directly to the Superintendent.	1 2 3 4 5 6	1 2 3 4 5 6

SECTION I: EDUCATION PLANNING FUNCTIONS AND STRUCTURES
PART C: EDUCATION PLANNING FUNCTIONS AND STRUCTURES (ADDITIONAL ITEMS)

1. Rank the following areas in their order of importance from the standpoint of formal planning in your school district. [Use number 1 through 10 with 1 indicating the area of most importance and 10 indicating the area of least importance.]

<input type="checkbox"/> a. Staff Development <input type="checkbox"/> b. Budget <input type="checkbox"/> c. Curriculum and Instruction <input type="checkbox"/> d. Building Programs <input type="checkbox"/> e. School and Community Relations	<input type="checkbox"/> f. Transportation <input type="checkbox"/> g. Federal Programs <input type="checkbox"/> h. Instructional Supportive Services <input type="checkbox"/> i. Research and Evaluation <input type="checkbox"/> j. School Boundaries/Organization
--	--

2. Rank the following tasks in their order of importance from the standpoint of formal planning in your school district. [Use 1 through 8 with 1 indicating the task of most importance and 8 indicating the task of least importance.]

<input type="checkbox"/> a. Developing Long-Range District Level Plans <input type="checkbox"/> b. Staff Training <input type="checkbox"/> c. Collecting, Organizing and Analyzing Information <input type="checkbox"/> d. Preparation of Proposals	<input type="checkbox"/> e. Assisting with Building Level Planning <input type="checkbox"/> f. Developing Short Range District Level Plans <input type="checkbox"/> g. Trouble Shooting Crises <input type="checkbox"/> h. Coordinating Central Administrative Tasks
--	---

3. Rank the following personnel in order of planning time you spend in direct communication/contact with them. [Use numbers 1 through 8 with 1 indicating the person who you spend the most time communicating with and 8 indicating the person you spend the least time communicating with.]

<input type="checkbox"/> a. School Board <input type="checkbox"/> b. School Principals <input type="checkbox"/> c. Parents <input type="checkbox"/> d. Superintendent	<input type="checkbox"/> e. Central Office Staff <input type="checkbox"/> f. Teachers <input type="checkbox"/> g. Community (at large) <input type="checkbox"/> h. Students
--	--

4. Rank the following groups in order in which you view them as your planning client groups. [Use numbers 1 through 8 with 1 indicating your most important client and 8 indicating your least important client.]

<input type="checkbox"/> a. School Board <input type="checkbox"/> b. School Principals <input type="checkbox"/> c. Parents <input type="checkbox"/> d. Superintendent	<input type="checkbox"/> e. Central Office Staff <input type="checkbox"/> f. Teachers <input type="checkbox"/> g. Community (at large) <input type="checkbox"/> h. Students
--	--

5. What percent of your planning time do you spend in: [fill in your approximate percent of time for each blank]

<input type="checkbox"/> a. Long-Range Planning (3-5 years) <input type="checkbox"/> b. Intermediate Planning (1-3 years) <input type="checkbox"/> c. Short-Range Planning (1 year and less) <input type="checkbox"/> d. Crisis Planning	
---	--

6. Your planning operation can best be described at this point in time as: [check (✓) the one statement that best describes your planning function]

<input type="checkbox"/> a. a function of administration whose definition is evolving <input type="checkbox"/> b. a "catch all" department for administrative problems <input type="checkbox"/> c. a well defined specific function of administration <input type="checkbox"/> d. a paper shuffling operation (planning in name only)	
--	--

7. How many professional staff, including yourself, comprise the planning operation (full-time equivalent): [check (✓) one]

<input type="checkbox"/> a. only myself <input type="checkbox"/> b. Two <input type="checkbox"/> c. Three	<input type="checkbox"/> d. Four <input type="checkbox"/> e. Five <input type="checkbox"/> f. More than five
---	--

SECTION II: EDUCATION PLANNER'S CHARACTERISTICS

1. Your formal title is: [check (✓) one]
- a. Associate Superintendent for Planning c. Director of Planning
 b. Assistant Superintendent for Planning d. Coordinator of Planning
 e. Other (specify) _____
2. How many years have you been in your present position? [check (✓) one]
- a. less than one year c. two years e. four years
 b. one year d. three years f. five years
3. What was your position prior to your present position? [check (✓) one]
- a. Principal c. Teacher e. Psychologist
 b. College Professor d. Guidance Counselor f. Graduate Student
 g. Central Office (specify) _____
 h. Other (specify) _____
4. Your educational level is: [check (✓) one]
- a. Post-Doctorate Studies c. Masters Plus e. Bachelor's
 b. Doctorate d. Masters
5. At your highest educational level your educational area/major was: [check () one]
- a. Administration d. Supervision g. Statistics
 b. Curriculum & Instruction e. Evaluation h. Other (specify) _____
 c. Research f. Planning
6. Have you had any formal training in planning: [check (✓) one] a. Yes b. No
 If yes, please describe (briefly): _____

7. When you were employed as education planner were you employed: [check (✓) one]
- a. From within the district b. From outside the district

SECTION III: SCHOOL DISTRICT CHARACTERISTICS

1. Your school district has a student membership of: [check (✓) one]
- a. less than 15,000 c. 20,000-24,999
 b. 15,000-19,999 d. 25,000 or above
2. How much money did your school district spend per student in average daily attendance/ membership during the 1974-75 school year: [check () one]
- a. less than \$800 c. \$1200 - \$1599 e. \$2000 - \$2399
 b. \$800 - \$1199 d. \$1600 - \$1999 f. \$2400 or above
3. Your school district includes the following grade levels: [check () one]
- a. K - 12 c. K - 6 e. K - 8 g. 9 - 12
 b. 1 - 12 d. K - 7 f. 8 - 12 h. Other (specify) _____
4. Your school district would be basically classified as: [check (✓) one]
- a. city b. suburban c. rural
5. In the past five years your student enrollment has been: [check (✓) one]
- a. increasing b. declining c. remaining about the same

PLEASE PLACE THIS QUESTIONNAIRE IN THE ATTACHED SELF-ADDRESSED STAMPED ENVELOPE AND RETURN IT

APPENDIX G

TABLES 26-50: CONTINGENCY TABLES AND
CHI-SQUARE VALUES ON PER PUPIL COST

Table 26

Association Between Per Pupil
Cost and Item One

	Disagree	Agree	
less than \$1200	9 (18%)	18 (37%)	27 (55%)
more than \$1200	5 (10%)	17 (35%)	22 (45%)
	14 (29%)	35 (71%)	49 (100%)

$$\chi^2 = .67$$

Table 27

Association Between Per Pupil
Cost and Item Two

	Disagree	Agree	
less than \$1200	6 (12%)	21 (43%)	27 (55%)
more than \$1200	3 (6%)	19 (39%)	22 (45%)
	9 (18%)	40 (82%)	49 (100%)

$$\chi^2 = .60$$

Table 28

Association Between Per Pupil
Cost and Item Three

	Disagree	Agree	
less than \$1200	7 (14%)	20 (41%)	27 (55%)
more than \$1200	5 (10%)	17 (35%)	22 (45%)
	12 (24%)	37 (76%)	49 (100%)

$$\chi^2 = .07$$

Table 29

Association Between Per Pupil
Cost and Item Four .

	Disagree	Agree	
less than \$1200	7 (14%)	20 (41%)	27 (55%)
more than \$1200	3 (6%)	19 (39%)	22 (45%)
	10 (20%)	39 (80%)	49 (100%)

$$\chi^2 = 1.13$$

Table 30

Association Between Per Pupil
Cost and Item Five

	Disagree	Agree	
less than \$1200	8 (16%)	19 (39%)	27 (55%)
more than \$1200	5 (10%)	17 (35%)	22 (45%)
	13 (37%)	36 (73%)	49 (100%)

$$x^2 = .30$$

Table 31

Association Between Per Pupil
Cost and Item Six

	Disagree	Agree	
less than \$1200	9 (18%)	18 (37%)	27 (55%)
more than \$1200	4 (8%)	18 (37%)	22 (45%)
	13 (27%)	36 (73%)	49 (100%)

$$\chi^2 = 1.43$$

Table 32

Association Between Per Pupil
Cost and Item Seven

	Disagree	Agree	
less than \$1200	8 (16%)	19 (39%)	27 (55%)
more than \$1200	6 (12%)	16 (33%)	22 (45%)
	14 (29%)	35 (71%)	49 (100%)

$$\chi^2 = .03$$

Table 33

Association Between Per Pupil
Cost and Item Eight.

	Disagree	Agree	
less than \$1200	11 (22%)	16 (33%)	27 (55%)
more than \$1200	7 (14%)	15 (31%)	22 (45%)
	18 (37%)	31 (63%)	49 (100%)

$$\chi^2 = .42$$

Table 34

Association Between Per Pupil
Cost and Item Nine

	Disagree	Agree	
less than \$1200	6 (12%)	21 (43%)	27 (55%)
more than \$1200	3 (6%)	19 (39%)	22 (45%)
	9 (18%)	40 (82%)	49 (100%)

$$\chi^2 = .60$$

Table 35

Association Between Per Pupil
Cost and Item Ten

	Disagree	Agree	
less than \$1200	16 (33%)	11 (22%)	27 (55%)
more than \$1200	3 (6%)	19 (39%)	22 (45%)
	19 (39%)	30 (61%)	49 (100%)

$$\chi^2 = 10.63^*$$

*statistically significant (p<.10)

Table 36

Association Between Per Pupil
Cost and Item Eleven

	Disagree	Agree	
less than \$1200	7 (14%)	20 (41%)	27 (55%)
more than \$1200	5 (10%)	17 (35%)	22 (45%)
	12 (24%)	37 (76%)	49 (100%)

$$\chi^2 = .07$$

Table 37.

Association Between Per Pupil
Cost and Item Twelve.

	Disagree	Agree	
less than \$1200	8 (16%)	19 (40%)	27 (55%)
more than \$1200	11 (23%)	11 (22%)	22 (44%)
	19 (38%)	30 (62%)	49 (100%)

$$X^2 = 2.12$$

Table 38

Association Between Per Pupil
Cost and Item Thirteen

	Disagree	Agree	
less than \$1200	6 (12%)	21 (43%)	27 (55%)
more than \$1200	5 (10%)	17 (35%)	22 (45%)
	11 (22%)	38 (78%)	49 (100%)

$$\chi^2 = 0.000$$

Table 39

Association Between Per Pupil
Cost and Item Fourteen

	Disagree	Agree	
less than \$1200	8 (16%)	19 (39%)	27 (55%)
more than \$1200	13 (27%)	9 (18%)	22 (45%)
	21 (43%)	28 (57%)	49 (100%)

$$\chi^2 = 4.30^*$$

*statistically significant (p .10)

Table 40

Association Between Per Pupil
Cost and Item Fifteen

	Disagree	Agree	
less than \$1200	10 (20%)	17 (35%)	27 (55%)
more than \$1200	7 (14%)	15 (31%)	22 (45%)
	17 (35%)	32 (65%)	49 (100%)

$$X^2 = .15$$

Table 41

Association Between Per Pupil
Cost and Item Sixteen.

	Disagree	Agree	
less than \$1200	8 (16%)	19 (39%)	27 (55%)
more than \$1200	2 (4%)	20 (41%)	22 (45%)
	10 (20%)	39 (80%)	49 (100%)

$$X^2 = 3.15$$

Table 42

Association Between Per Pupil
Cost and Item Seventeen

	Disagree	Agree	
less than \$1200	5 (10%)	22 (45%)	27 (55%)
more than \$1200	2 (4%)	20 (41%)	22 (45%)
	7 (14%)	42 (86%)	49 (100%)

$$\chi^2 = .88$$

Table 43

Association Between Per Pupil
Cost and Item Eighteen

	Disagree	Agree	
less than \$1200	11 (22%)	16 (33%)	27 (55%)
more than \$1200	3 (6%)	19 (39%)	22 (45%)
	14 (29%)	35 (71%)	49 (100%)

$$\chi^2 = 4.36^*$$

*statistically significant ($p < .10$)

Table 44

Association Between Per Pupil
Cost and Item Nineteen

	Disagree	Agree	
less than \$1200	9 (18%)	18 (37%)	27 (55%)
more than \$1200	4 (8%)	18 (37%)	22 (45%)
	13 (27%)	36 (73%)	49 (100%)

Table 45

Association Between Per Pupil
Cost and Item Twenty.

	Disagree	Agree	
less than \$1200	19 (39%)	8 (16%)	27 (55%)
more than \$1200	13 (27%)	9 (18%)	22 (45%)
	32 (66%)	17 (34%)	49 (100%)

Table 46

Association Between Per Pupil
Cost and Item Twenty-One

	Disagree	Agree	
less than \$1200	8 (16%)	19 (39%)	27 (55%)
more than \$1200	5 (10%)	17 (35%)	22 (45%)
	13 (27%)	36 (73%)	49 (100%)

$$X^2 = .30$$

Table 47

Association Between Per Pupil
Cost and Item Twenty-Two

	Disagree	Agree	
less than \$1200	14 (29%)	13 (26%)	27 (55%)
more than \$1200	7 (14%)	15 (31%)	22 (45%)
	21 (43%)	28 (57%)	49 (100%)

$$\chi^2 = 1.99$$

Table 48

Association Between Per Pupil
Cost and Item Twenty-Three

	Disagree	Agree	
less than \$1200	10 (20%)	17 (35%)	27 (55%)
more than \$1200	8 (16%)	14 (29%)	22 (45%)
	18 (37%)	31 (63%)	49 (100%)

$$\chi^2 = 0.00$$

Table 49

Association Between Per Pupil
Cost and Item Twenty-Four

	Disagree	Agree	
less than \$1200	8 (16%)	19 (39%)	27 (55%)
more than \$1200	12 (25%)	10 (20%)	22 (45%)
	20 (41%)	29 (59%)	49 (100%)

$$\chi^2 = 3.12$$

Table 50

Association Between Per Pupil
Cost and Item Twenty-Five

	Disagree	Agree	
less than \$1200	7 (14%)	20 (41%)	27 (55%)
more than \$1200	8 (16%)	14 (29%)	22 (45%)
	15 (31%)	34 (69%)	49 (100%)

$$\chi^2 = .62$$

APPENDIX H

TABLES 51-75: CONTINGENCY TABLES AND CHI-SQUARE
VALUES ON SCHOOL DISTRICT CLASSIFICATION

Table 51

Association Between Classification
of District and Item One

	Disagree	Agree	
City	6 (12%)	8 (17%)	14 (29%)
Suburban	5 (10%)	24 (49%)	29 (59%)
Rural	3 (6%)	3 (6%)	6 (12%)
	14 (29%)	35 (71%)	49 (100%)

$$\chi^2 = 4.57$$

Table 52

Association Between Classification
of District and Item Two

	Disagree	Agree	
City	2 (4%)	12 (25%)	14 (29%)
Suburban	3 (6%)	26 (53%)	29 (59%)
Rural	4 (8%)	2 (4%)	6 (12%)
	9 (18%)	40 (82%)	49 (100%)

$$\chi^2 = 10.74^*$$

*statistically significant (p<.10)

Table 53

Association Between Classification
of District and Item Three

	Disagree	Agree	
City	6 (12%)	8 (17%)	14 (29%)
Suburban	2 (4%)	27 (55%)	29 (59%)
Rural	4 (8%)	2 (4%)	6 (12%)
	12 (24%)	37 (76%)	49 (100%)

$$\chi^2 = 13.18^*$$

*statistically significant ($p < .10$)

Table 54

Association Between Classification
of District and Item Three

	Disagree	Agree	
City	4 (8%)	9 (1%)	13 (27%)
Suburban	3 (6%)	27 (5%)	30 (61%)
Rural	3 (6%)	3 (6%)	6 (12%)
	10 (20%)	39 (8%)	49 (100%)

$$X^2 = 5.81$$

Table 55

Association Between Classification
of District and Item Five

	Disagree	Agree	
City	5 (11%)	9 (18%)	14 (29%)
Suburban	5 (10%)	24 (49%)	29 (59%)
Rural	3 (6%)	3 (6%)	6 (12%)
	13 (27%)	36 (73%)	49 (100%)

$$\chi^2 = 3.59$$

Table 56

Association Between Classification
of District and Item Six

	Disagree	Agree	
City	4 (9%)	10 (20%)	14 (29%)
Suburban	5 (10%)	24 (49%)	29 (59%)
Rural	4 (8%)	2 (4%)	6 (12%)
	13 (27%)	36 (73%)	49 (100%)

$$\chi^2 = 6.27^*$$

*statistically significant ($p < .10$)

Table 57

Association Between Classification
of District and Item Seven

	Disagree	Agree	
City	8 (17%)	6 (12%)	14 (29%)
Suburban	2 (4%)	27 (55%)	29 (59%)
Rural	4 (8%)	2 (4%)	6 (12%)
	14 (29%)	35 (71%)	49 (100%)

$$\chi^2 = 16.54$$

*statistically significant (p<.10)

Table 58

Association Between Classification
of District and Item Eight

	Disagree	Agree	
City	6 (13%)	8 (16%)	14 (29%)
Suburban	7 (14%)	22 (45%)	29 (59%)
Rural	5 (10%)	1 (2%)	6 (12%)
	18 (37%)	31 (63%)	49 (100%)

$$\chi^2 = 7.81^*$$

*statistically significant ($p < .10$)

Table 59

Association Between Classification
of District and Item Nine

	Disagree	Agree	
City	2 (4%)	12 (25%)	14 (29%)
Suburban	4 (8%)	25 (51%)	29 (59%)
Rural	3 (6%)	3 (6%)	6 (12%)
	9 (18%)	40 (82%)	49 (100%)

$$\chi^2 = 4.56$$

Table 60

Association Between Classification
of District and Item Ten

	Disagree	Agree	
City	6 (13%)	8 (16%)	14 (29%)
Suburban	7 (14%)	22 (45%)	29 (59%)
Rural	5 (10%)	1 (2%)	6 (12%)
	18 (37%)	31 (63%)	49 (100%)

$$X^2 = 7.81*$$

*statistically significant (p<.10)

Table 61

Association Between Classification
of District and Item Eleven

	Disagree	Agree	
City	3 (6%)	11 (23%)	14 (29%)
Suburban	5 (10%)	24 (49%)	29 (59%)
Rural	4 (8%)	2 (4%)	6 (12%)
	12 (24%)	37 (76%)	49 (100%)

$$\chi^2 = 6.67*$$

*statistically significant ($p < .10$)

Table 62

Association Between Classification
of District and Item Twelve

	Disagree	Agree	
City	2 (4%)	12 (25%)	14 (29%)
Suburban	14 (29%)	15 (30%)	29 (59%)
Rural	3 (6%)	3 (6%)	6 (12%)
	19 (39%)	30 (61%)	49 (100%)

$$\chi^2 = 4.96$$

Table 63

Association Between Classification
of District and Item Thirteen

	Disagree	Agree	
City	4 (9%)	10 (20%)	14 (29%)
Suburban	5 (10%)	24 (49%)	29 (59%)
Rural	2 (4%)	4 (8%)	6 (12%)
	11 (23%)	38 (77%)	49 (100%)

$$\chi^2 = 1.16$$

Table 64

Association Between Classification
of District and Item Fourteen

	Disagree	Agree	
City	7 (14%)	7 (15%)	14 (29%)
Suburban	14 (29%)	15 (30%)	29 (59%)
Rural	0 (0%)	6 (12%)	6 (12%)
	21 (43%)	28 (57%)	49 (100%)

$$\chi^2 = 5.14$$

Table 65

Association Between Classification
of District and Item Fifteen

	Disagree	Agree	
City	3 (7%)	11 (22%)	14 (29%)
Suburban	10 (20%)	19 (39%)	29 (59%)
Rural	4 (8%)	2 (4%)	6 (12%)
	17 (35%)	32 (65%)	49 (100%)

$$\chi^2 = 3.79$$

Table 66

Association Between Classification
of District and Item Sixteen

	Disagree	Agree	
City	3 (6%)	11 (23%)	14 (29%)
Suburban	4 (8%)	25 (51%)	29 (59%)
Rural	3 (6%)	3 (6%)	6 (12%)
	10 (20%)	39 (80%)	49 (100%)

$$\chi^2 = 4.02$$

Table 67

Association Between Classification
of District and Item Seventeen

	Disagree	Agree	
City	2 (4%)	12 (25%)	14 (29%)
Suburban	2 (4%)	27 (55%)	29 (59%)
Rural	3 (6%)	3 (6%)	6 (12%)
	7 (14%)	42 (86%)	49 (100%)

$$\chi^2 = 7.54^*$$

*statistically significant ($p < .10$)

Table 68

Association Between Classification
of District and Item Eighteen

	Disagree	Agree	
City	3 (7%)	11 (22%)	14 (29%)
Suburban	5 (10%)	24 (49%)	29 (59%)
Rural	5 (10%)	1 (2%)	6 (12%)
	13 (27%)	36 (73%)	49 (100%)

$$\chi^2 = 11.40^*$$

*statistically significant ($p < .10$)

Table 69

Association Between Classification
of District and Item Nineteen

	Disagree	Agree	
City	2 (4%)	12 (25%)	14 (29%)
Suburban	7 (14%)	22 (45%)	29 (59%)
Rural	4 (8%)	2 (4%)	6 (12%)
	13 (27%)	26 (73%)	49 (100%)

$$\chi^2 = 6.12^*$$

*statistically significant (p<.10)

Table 70

Association Between Classification
of District and Item Twenty

	Disagree	Agree	
City	12 (25%)	2 (4%)	14 (29%)
Suburban	15 (30%)	14 (29%)	29 (59%)
Rural	5 (10%)	1 (2%)	6 (12%)
	32 (65%)	17 (35%)	49 (100%)

$$\chi^2 = 5.80^*$$

*statistically significant ($p < .10$)

Table 71

Association Between Classification
of District and Item Twenty-One

	Disagree	Agree	
City	4 (9%)	10 (20%)	14 (29%)
Suburban	6 (12%)	23 (47%)	29 (59%)
Rural	3 (6%)	3 (6%)	6 (12%)
	13 (27%)	36 (73%)	49 (100%)

$$\chi^2 = 2.23$$

Table 72

Association Between Classification
of District and Item Twenty-Two

	Disagree	Agree	
City	7 (15%)	7 (14%)	14 (29%)
Suburban	7 (14%)	22 (45%)	29 (59%)
Rural	5 (10%)	1 (2%)	6 (12%)
	19 (39%)	30 (61%)	49 (100%)

$$\chi^2 = 8.38^*$$

*statistically significant ($p < .10$)

Table 73

Association Between Classification
of District and Item Twenty-Three

	Disagree	Agree	
City	5 (11%)	9 (18%)	14 (29%)
Suburban	9 (18%)	20 (41%)	29 (59%)
Rural	4 (8%)	2 (4%)	6 (12%)
	18 (37%)	31 (63%)	49 (100%)

$$\chi^2 = 2.72$$

Table 74

Association Between Classification
of District and Item Twenty-Four

	Disagree	Agree	
City	7 (15%)	7 (4%)	14 (29%)
Suburban	11 (22%)	18 (37%)	29 (59%)
Rural	2 (4%)	4 (8%)	6 (12%)
	20 (40%)	29 (59%)	49 (100%)

$$\chi^2 = .73$$

Table 75

Association Between Classification
of District and Item Twenty-Five

	Disagree	Agree	
City	6 (13%)	8 (16%)	14 (29%)
Suburban	9 (18%)	20 (41%)	29 (59%)
Rural	0 (0%)	6 (12%)	6 (12%)
	15 (31%)	34 (69%)	49 (100%)

$$\chi^2 = 3.64$$

APPENDIX I

TABLES 76-100: CONTINGENCY TABLES AND
CHI-SQUARE VALUES ON ENROLLMENT

Table 76

Association Between Student Enrollment
and Item One

	Disagree	Agree	
Increasing	7 (14%)	16 (33%)	23 (47%)
Remaining the same	5 (10%)	18 (37%)	23 (47%)
Declining	2 (4%)	1 (2%)	3 (6%)
	14 (29%)	35 (71%)	49 (100%)

$$\chi^2 = 2.70$$

Table 77

Association Between Student Enrollment
and Item Two

	Disagree	Agree	
Increasing	5 (10%)	18 (37%)	23 (47%)
Remaining the same	4 (8%)	19 (39%)	23 (47%)
Declining	0 (0%)	3 (6%)	3 (6%)
	9 (18%)	40 (82%)	49 (100%)

$$\chi^2 = .86$$

Table 78

Association Between Student Enrollment
and Item Three

	Disagree	Agree	
Increasing	5 (10%)	18 (37%)	23 (47%)
Remaining the same	5 (10%)	18 (37%)	23 (47%)
Declining	2 (4%)	1 (2%)	3 (6%)
	12 (24%)	37 (76%)	49 (100%)

$$\chi^2 = 3.07$$

Table 79

Association Between Student Enrollment
and Item Four

	Disagree	Agree	
Increasing	4 (8%)	19 (39%)	23 (47%)
Remaining the same	6 (12%)	17 (35%)	23 (47%)
Declining	0 (0%)	3 (6%)	3 (6%)
	10 (20%)	39 (80%)	49 (100%)

$$X^2 = 1.35$$

Table 80

Association Between Student Enrollment
and Item Five

	Disagree	Agree	
Increasing	6 (12%)	17 (35%)	23 (47%)
Remaining the same	7 (14%)	16 (33%)	23 (47%)
Declining	0 (0%)	3 (6%)	3 (6%)
	13 (27%)	36 (73%)	49 (100%)

$$\chi^2 = 1.27$$

Table 81

Association Between Student Enrollment
and Item Six

	Disagree	Agree	
Increasing	6 (12%)	17 (35%)	23 (47%)
Remaining the same	7 (14%)	16 (33%)	23 (47%)
Declining	0 (0%)	3 (6%)	3 (6%)
	13 (27%)	36 (73%)	49 (100%)

$$\chi^2 = 1.27$$

Table 82

Association Between Student Enrollment
and Item Seven

	Disagree	Agree	
	6 (12%)	17 (35%)	23 (47%)
	6 (12%)	17 (35%)	23 (47%)
	2 (4%)	1 (2%)	3 (6%)
	14 (29%)	35 (71%)	49 (100%)

$$\chi^2 = 2.27$$

Table 83

Association Between Student Enrollment
and Item Eight

	Disagree	Agree	
	9 (18%)	14 (29%)	23 (47%)
	8 (16%)	15 (31%)	23 (47%)
	1 (2%)	2 (4%)	3 (6%)
	18 (37%)	31 (63%)	49 (100%)

$$\chi^2 = .11$$

Table 84

Association Between Student Enrollment
and Item Nine

	Disagree	Agree	
Increasing	6 (12%)	17 (35%)	23 (47%)
Remaining the same	3 (6%)	20 (41%)	23 (47%)
Declining	0 (0%)	3 (6%)	3 (6%)
	9 (18%)	40 (82%)	49 (100%)

$$\chi^2 = 2.02$$

Table 85

Association Between Student Enrollment
and Item Ten

	Disagree	Agree	
Increasing	13 (27%)	10 (20%)	23 (47%)
Remaining the same	6 (12%)	17 (35%)	23 (47%)
Declining	0 (0%)	3 (6%)	3 (6%)
	19 (39%)	30 (61%)	49 (100%)

$$\chi^2 = 6.51^*$$

*statistically significant ($p < .10$)

Table 86

Association Between Student Enrollment
and Item Eleven

	Disagree	Agree	
Increasing	7 (14%)	16 (33%)	23 (47%)
Remaining the same	5 (10%)	18 (37%)	23 (47%)
Declining	0 (0%)	3 (6%)	3 (6%)
	12 (24%)	37 (76%)	49 (100%)

$$\chi^2 = 1.51$$

Table 87

Association Between Student Enrollment
and Item Twelve

	Disagree	Agree	
Increasing	11 (22%)	12 (25%)	23 (47%)
Remaining the same	8 (16%)	15 (31%)	23 (47%)
Declining	0 (0%)	3 (6%)	3 (6%)
	19 (39%)	30 (61%)	49 (100%)

$$\chi^2 = 2.85$$

Table 88

Association Between Student Enrollment
and Item Thirteen

	Disagree	Agree	
Increasing	5 (10%)	18 (37%)	23 (47%)
Remaining the same	6 (12%)	17 (35%)	23 (47%)
Declining	0 (0%)	3 (6%)	3 (6%)
	11 (22%)	38 (78%)	49 (100%)

$$\chi^2 = 1.05$$

Table 89

Association Between Student Enrollment
and Item Fourteen

	Disagree	Agree	
Increasing	9 (18%)	14 (29%)	23 (47%)
Remaining the same	10 (20%)	13 (27%)	23 (47%)
Declining	2 (4%)	1 (2%)	3 (6%)
	21 (43%)	28 (57%)	49 (100%)

$$\chi^2 = .83$$

Table 90

Association Between Student Enrollment
and Item Fifteen

	Disagree	Agree	
Increasing	12 (25%)	11 (22%)	23 (47%)
Remaining the same	5 (10%)	18 (37%)	23 (47%)
Declining	0 (0%)	3 (6%)	3 (6%)
	17 (35%)	32 (65%)	49 (100%)

$$\chi^2 = 6.40^*$$

*statistically significant ($p < .10$)

Table 91

Association Between Student Enrollment
and Item Sixteen

	Disagree	Agree	
Increasing	7 (14%)	16 (33%)	23 (47%)
Remaining the same	3 (6%)	20 (41%)	23 (47%)
Declining	0 (0%)	3 (6%)	3 (6%)
	10 (20%)	39 (80%)	49 (100%)

$$\chi^2 = 2.96$$

Table 92

Association Between Student Enrollment
and Item Seventeen

	Disagree	Agree	
Increasing	4 (8%)	19 (39%)	23 (47%)
Remaining the same	3 (6%)	20 (41%)	23 (47%)
Declining	0 (0%)	3 (6%)	3 (6%)
	7 (14%)	42 (86%)	49 (100%)

$$\chi^2 = .71$$

Table 93

Association Between Student Enrollment
and Item Eighteen

	Disagree	Agree	
Increasing	8 (16%)	15 (31%)	23 (47%)
Remaining the same	5 (10%)	18 (37%)	23 (47%)
Declining	0 (0%)	3 (6%)	3 (6%)
	13 (27%)	36 (73%)	49 (100%)

$$\chi^2 = 2.16$$

Table 94

Association Between Student Enrollment
and Item Nineteen

	Disagree	Agree	
Increasing	11 (22%)	12 (25%)	23 (47%)
Remaining the same	2 (4%)	21 (43%)	23 (47%)
Declining	0 (0%)	3 (6%)	3 (6%)
	13 (27%)	36 (73%)	49 (100%)

$$\chi^2 = 10.19^*$$

*statistically significant ($p < .10$)

Table 95

Association Between Student Enrollment
and Item Twenty

	Disagree	Agree	
Increasing	13 (27%)	10 (20%)	23 (47%)
Remaining the same	16 (33%)	7 (14%)	23 (47%)
Declining	3 (6%)	0 (0%)	3 (6%)
	32 (65%)	17 (35%)	49 (100%)

$$X^2 = 2.56$$

Table 96

Association Between Student Enrollment
and Item Twenty-One

	Disagree	Agree	
Increasing	7 (14%)	16 (33%)	23 (47%)
Remaining the same	6 (12%)	17 (35%)	23 (47%)
Declining	0 (0%)	3 (6%)	3 (6%)
	13 (27%)	36 (73%)	49 (100%)

$$\chi^2 = 1.27$$

Table 97

Association Between Student Enrollment
and Item Twenty-Two

	Disagree	Agree	
Increasing	10 (20%)	13 (27%)	23 (47%)
Remaining the same	11 (23%)	12 (24%)	23 (47%)
Declining	0 (0%)	3 (6%)	3 (6%)
	21 (43%)	28 (57%)	49 (100%)

$$\chi^2 = 2.49$$

Table 98

Association Between Student Enrollment
and Item Twenty-Three

	Disagree	Agree	
Increasing	14 (29%)	9 (18%)	23 (47%)
Remaining the same	4 (8%)	19 (39%)	23 (47%)
Declining	0 (0%)	3 (6%)	3 (6%)
	18 (37%)	31 (63%)	49 (100%)

$$\chi^2 = 11.21^*$$

*statistically significant ($p < .10$)

Table 99

Association Between Student Enrollment
and Item Twenty-Four

	Disagree	Agree	
Increasing	8 (16%)	15 (31%)	23 (47%)
Remaining the same	10 (20%)	13 (27%)	23 (47%)
Declining	2 (4%)	1 (2%)	3 (6%)
	20 (41%)	29 (59%)	49 (100%)

$$\chi^2 = 1.24$$

Table 100

Association Between Student Enrollment
and Item Twenty-Five

	Disagree	Agree	
Increasing	9 (18%)	14 (29%)	23 (47%)
Remaining the same	6 (12%)	17 (35%)	23 (47%)
Declining	0 (0%)	3 (6%)	3 (6%)
	15 (31%)	34 (69%)	49 (100%)

$$\chi^2 = 2.33$$

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A DESCRIPTIVE ANALYSIS OF PLANNING STRUCTURES AND FUNCTIONS
AS PERCEIVED BY SUPERINTENDENTS AND PRACTICED AND PERCEIVED
BY PLANNING INCUMBENTS IN MEDIUM STUDENT POPULATION SCHOOL
DISTRICTS (15,000-25,000) IN THE UNITED STATES

by

David L. Lusk

(ABSTRACT)

The study was based on the need for descriptive information on comprehensive planning as it currently exists in educational institutions and to make the information available to the profession. The problem of this study was to describe the structural and functional arrangements of formal planning organizations in education as perceived by superintendents and as practiced and perceived by planning incumbents in medium student population school districts (15,000-25,000) in the United States.

The six objectives of the study were to ascertain selected descriptive characteristics within the selected school districts, including:

1. Characteristics of the planning structure and planning functions as perceived by school superintendents;
2. Professional and selected personal characteristics of the planning incumbent;

3. Characteristics of the planning structure and planning functions as practiced by the planning incumbent;

4. Characteristics of the planning structure and planning functions as perceived by the planning incumbent;

5. Relationship between selected characteristics of the planning structure and planning functions as practiced and perceived by the planning incumbents; and,

6. Relationship between selected characteristics of the planning structure and planning functions as perceived by school superintendents and practiced by planning incumbents.

A survey questionnaire, based on the literature, was developed for superintendents and planning incumbents. Of the 223 questionnaires mailed, 164 (74 percent) of the superintendents responded. Forty-nine (30 percent) responded that they did have planners and 49 planners' questionnaires were returned.

On the basis of the data in this research, the following conclusions were drawn relative to the objectives of the study:

1. Education planning is an "evolving" but not yet a major aspect of the school districts surveyed.

2. The role of "facilitator" or helping others to plan was generally agreed upon by superintendents as the role of the planner.

3. Planning operations in public school systems probably are not under the leadership of personnel who could be considered "professionally trained" in planning, nor do operations have long enough service and experience to adequately assess their impact change at this time.

4. The superintendent tends to be seen as the key factor in the success or failure of the planning process.

5. There is general agreement among planners as to similarity in regard to current practices in planning.

6. Planning, as it is practiced is not "as it should be", although there is general agreement among planners on what "should be" in terms of planning functions and structures.

7. Commitment of central office administrators, other than the planner, is not as high as is needed for success of the planning function.

8. There was only slight association in the perception of the role of the planner as viewed by superintendents and planners.