

EDUCATIONAL PLANNING FOCI IN ISEP PUBLICATIONS, 1974 TO PRESENT: A RETROSPECTIVE ESSAY

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With the International Society for Educational Planning (ISEP) commemorating its 40th anniversary this year, the editor of ISEP's journal, *Educational Planning*, invited us to write a retrospective essay on the content of ISEP's publications throughout its history. Over the past four decades, ISEP's publications have presented a balanced mix of theory and practice, both in preK-12 education and in higher education. The initial ISEP publication was a rudimentary newsletter, which began in 1970 or 1971. Under the leadership of Cicely Watson, Chair of the Educational Planning department at the Ontario Institute for Educational Studies (OISE) in Toronto, however, this newsletter became a journal. In 1974, Cicely and her colleague, Saeed Quazi, arranged to fund the journal through several major funded projects they were directing and arranged for its printing through a friend of Saeed's. Cicely's husband designed the journal's cover. It was published from Volume 1(1) May through Volume 4(2). In October, 1977, when Cicely was called upon to serve on the Minister of Education's Commission on Declining Enrollment and as a fellow in India with the Indo-Canadian Institute, the journal ceased being issued. Without her leadership, the journal then returned to being merely a newsletter, last published in Burlington, Vermont, under the guidance of Robert Carlson. This newsletter was unrelated to the current and interesting electronic newsletter currently produced by Mark Yulich; the Vermont newsletter was on mimeograph paper in green ink (go Cats). In the spring of 1984, the newsletter took on a more similar appearance to the current *Educational Planning* and had the title *ISEP*. This was a direct precursor to the present journal and was run for about a year, with two volumes, the spring and winter editions for 1994. The cover design was done by Dan Kilgo, president of Craftsmen Printers in Tuscaloosa, Alabama. Following the newsletter, the board approved the resurrection for the following summer of *Educational Planning* with Volume 4(4). There may be lost issues and former members have not found a Volume 4(3). In all, the journal spans about 40 years, and its authors' works reflect the changing ideas and themes in planning. We chose to take a qualitative approach to the analysis, utilizing thematic analysis. As with all qualitative analyses, all categorization is highly subjective, with the knowledge and experience of the reviewers serving as the biased lens through which all information is filtered. Other reviewers may well discern different themes with equal validity. The interpretative comments regarding each theme also represent the subjective opinions of the authors of this essay; these interpretations also are subject to equally valid other interpretations. This is in keeping with the culture of ISEP over the past 40 years, where differences of interpretation and experiences are welcomed in a professional, yet highly convivial manner.

LIMITATIONS

The word limit imposed on this essay precludes listing the articles reviewed in a reference list. Also, the authors relied on their own collections of the journal, from which several issues were missing. Finally, although Tables 1 through 6 ascribe many authors' contributions to each theme, these lists are representative, not exhaustive. Some fine educational planning articles do not appear, simply because they did not align with one of the major themes; other contributions were omitted because their content was only tangential to educational planning.

THE MAJOR THEMES

Eleven major themes emerged from this analysis. These included, in no special order:

- futurism;
- technical aspects of planning;

- rational comprehensive planning;
- strategic planning;
- alternatives to rational comprehensive planning;
- operational planning;
- needs assessment;
- relationships between policy and planning;
- evaluation and feedback loops in planning;
- site-based planning; and
- international applications of educational planning.

Each theme is discussed briefly in the sections that follow. Note that three or four articles in four decades place our theme construct at risk for criticism. That's ok with us!

Futurism

Russell Davis (1985) noted that planners deal with the near term, whereas futurists deal with the distant future. Planners are concerned with implementation, whereas futurists are not. Planners deal with specific desired outcomes, whereas futurists deal with alternative broad trends. Futurism was the focus of a 1976 thematic issue of the journal. It did not resurface in future issues to any considerable extent. Much as Russell Davis pointed out, we interpreted this pattern as being attributable to the fact that, although long-range prognostications of broad issues can be fascinating, educational planners are generally working within short to medium term horizons and focus on more immediate, tangible issues. Several ISEP members and authors had a strong interest in futurism, with some belonging to the World Future Society and similar organizations. Some of the futures theme is attributable to the invited authors who were gracious in providing copy and lending their names in support of the resurgence of the journal. This group included Russell Davis, Guy Beneveniste, Hector Correa, and Dan Inbar.

Technical Aspects of Planning

Articles devoted to technical aspects of planning, e.g., linear programming, cost-benefit/cost-effectiveness analysis, manpower planning, or geo-mapping applications were well represented in the journal from 1984 until 1995, but faded out after this period. This topical evolution may be interpreted as a shift from highly complex, highly centralized rational comprehensive planning led by planning specialists to more decentralized processes led by less technically-oriented school and university administrators, a point followed up below.

Rational Comprehensive Planning

Rational comprehensive planning is a process which attempts to scan the internal and external environments of organizations, establish goals, identify a full range of alternatives that might help to achieve those goals, and then select the most desirable alternatives. Throughout the period of 1974 to present, this is the most prevalent model represented in ISEP's publications. However, since 2002, its presence in the journal has dropped substantially. Our interpretation of this shift involves two different, probably interwoven ideas. First is the shift away from professional planners, in all but the large districts, to lower organizational levels, generally the building principal. Doug Hamilton's Vol. 5(1), article addressed this point. The second idea reflects the fact that often schools, districts, and institutions of higher education found the planning process to be largely mechanistic, highly complex, resource-exhaustive, and impractical. Too often, it has resulted in extensive plans that were never successfully implemented. Over time, more general attention to the rational comprehensive model shifted to one specific variation of that model, strategic planning.

Strategic Planning

We debated the extent to which strategic planning warranted being considered a separate theme from rational comprehensive planning. However, because journal authors referred to this specific variant by name and generally cited the most common versions of strategic planning we address it separately.

This model only entered ISEP's journal in 1986, but it has remained a fairly consistent favorite until the present.

Alternatives to Rational Comprehensive Planning

Since its initial publication in 1974, ISEP has given great attention to alternatives to rational comprehensive planning, e.g., incremental, mixed-scanning, collaborative, or developmental approaches. These articles have focused almost equally on the theoretical rationales for these alternative models and on their implementation in schools, districts, and universities. We interpret this focus as being a reaction to the complexity and limitations (e.g., resources, information, time, and capacity) inherent in the rational comprehensive model and the attempt by practitioners and scholars to find approaches more suited to their specific conditions and needs over time, especially such conditions as they exist in schools. Bryson (1995) provided a thorough discussion of strategic planning's concerns as they relate to nonprofit organizations.

Operational Planning

This theme includes such foci as facilities planning, budgeting, curriculum planning, and instructional planning, as well as some of the operational aspects of rational comprehensive planning. In most cases, the articles reviewed represented applications of broader educational planning models to specific aspects of education. Such articles remained a consistent theme of the ISEP journal from 1995 to the present. We interpreted this as representing the wide range of planning applications that various members of the educational community are called upon to make, again with little familiarity with the educational planning knowledge base. Teacher, administrator, and higher education administrator preparation programs typically do not equip their graduates with the knowledge and skills needed to address the planning tasks they are called upon to lead, resulting in much trial-and-error and re-invention of existing, but unknown and untested, approaches.

Needs Assessment

Needs assessment was a consistent theme in the journal from 1974 through 2000. In large measure, this was attributable to two primary contributors, Belle Ruth Witkin and Laura Weintraub, who carried on a heated debate on the topic. We interpreted the disappearance of this theme as part of the shift to an emphasis on the strategic planning model, where the analysis of strengths, weaknesses, opportunities and threats, and the establishment of concrete goals represent a basic needs assessment process.

The Relationships between Policy and Planning

Another theme we discerned in the journal, from its inception to the present, was the relationships between policy and planning. Attention was given to national, state, and district policy, as well as to legal issues. We were somewhat surprised that this continued to be such a strong focus, rather than disappearing into the general environmental analysis components of the strategic planning model, as happened with themes such as rational comprehensive planning and needs assessment. We attributed this continued emphasis as a testimony to the unique policy contexts among districts, universities, states, and nations, and to the strength of their impacts on educational planning at all levels.

Evaluation and Feedback Loops in Planning

Specific attention to the evaluation and feedback loop in planning entered the journal in 1977 and remained strong until 1986. It re-surfaced briefly in 1997. Again, we interpret this loss of emphasis in the more recent literature as part of the shift in emphasis to the strategic planning model, which generally includes cybernetic evaluation and feedback loops. Recent articles tend to mention these loops briefly as part of the overall planning process, rather than focusing on them specifically. This may reflect the passing attention given by authors to the more mathematical and technologically rigorous planning tools and concepts.

Site-based Planning

In 1988 and 1989, two articles on the Oklahoma City Schools' pioneering attempts at site-based planning were featured in the journal. Later (2000), Adam Nir discussed site-based planning in the national, centralized context of Israel. We interpreted this interest in site-based planning as being a consequence of the previous emphasis on centralized planning, e.g., district-level planning rather than school-level. As decentralized planning became more of the norm than the exception, at least in the U.S. and Canada over the past two decades, this topic was no longer a novelty, nor an innovation.

International Applications of Planning

The final theme discerned from the journal, from its inception to present, was the international applications of planning. We interpreted this theme as linked to the very purpose of ISEP and to the emphasis of *International* in its name. Although the membership of ISEP has largely been from the U.S. and Canada, its journal has always been enriched by the contributions of scholars around the globe. ISEP's more recent, highly successful conferences in Trinidad, Turkey, and Italy, and the dramatic increase in international members, have further added to the international character of the organization. The international contributions to the journal reinforce the global applicability of much of the knowledge base and various tools used in educational planning, while, at the same time taking into consideration the crucial role that the specific situation, policy context, and culture of each organization plays in the planning process.

CONCLUSIONS

First, this has been a most enjoyable project. Not only has it provided us with an impetus to re-read many fine articles published by *Educational Planning* over the years, but it has brought to mind the pantheon of outstanding scholars and practitioners (and friends) we have known through our long association with ISEP—truly a trip down memory lane! It, also, has reinforced ISEP's many contributions to the knowledge base in educational planning.

The themes that emerged challenged us to examine trends in planning over the past four decades. We have concluded that the strengths, weaknesses, and processes of the major planning models were well recognized in the knowledge base since the early 1980s and were emerging two decades prior to this. Sadly, we concluded that many practitioners, at all levels, are not sufficiently familiar with this knowledge base to apply it effectively and efficiently in their daily situations. This has led to an over-reliance on the most highly marketed approach, strategic planning, with all of the strengths and weaknesses inherent in a rational comprehensive planning model. In the years ahead, ISEP must face the challenge of sharing its knowledge base more effectively, not only with those professionals who have an abiding interest in planning, but also with a broader spectrum of practitioners.

Although a few articles on each appeared, we were surprised that so little attention was paid to linking planning to the change process, school improvement, or educational reform. Even more glaringly absent were articles linking planning to the implementation and institutionalization processes. Considering the importance, remarkably little attention was given to the human aspects of these processes. Clearly, these are areas in which the knowledge base can, and should, continue to grow. ISEP and its publications are as relevant today as when they began four decades ago.

Table 1
ISEP Journal, 1974 to 1977

Theme	Sample Authors
Futurism	Willis Harman (1976); Hendrik Gideonse (1976); Michael Falk (1976); Rudolph Johnston & Thomas McCollough (1976); Gerald King (1976); Lester Hunt (1976); George Peek (1976)
Alternatives to Rational Comprehensive Planning	Guy Beneveniste (1974); Paul Watson (1974); Perry Johnston & Maureen Wilson (1974); Edward Blakely (1975); William Medlin (1975); Frank Jackson & William Heeny (1975); Dan Inbar (1975, 1976); Hector Correa (1975); Bruce Cooper (1976)
Operational Planning	Lawrence Bezear (1975); William Tomlinson & Ken Tanner (1975); David Groves & Gerald Cross (1975); Virginia Stoutamire & Ken Kyre (1975)
Needs Assessment	Paul Campbell (1974); Roger Talley (1974); Belle Ruth Witkin (1976); Martin Hershkowitz (1976); Fenwick English (1976); Albert Bender (1976); Martin Hershkowitz & Mohammad Shami (1976); Frank Banghart, Pacharee Kraprayoon, & Geoff Tully (1976)
Relationships between Policy and Planning	Alex Ducanis (1975); Edward Steward (1975); Gerald Freeborne (1975); Michael Marge (1975); Ted Humphreys (1975); W. F. J. Busch (1975); A. J. Barone (1975); S. Bassalmasi (1975); Gerald Ridge (1975); Ronald McDouball (1975); W. J. Lambie (1975); Stephen Kaagan & Janice Weinman (1976); Wilfred Brown (1976); Kenneth Dyl & Bruce Morton (1976); R. W. B. Jackson (1977)
Evaluation and Feedback Loops in Planning	Bob Carlson (1977); Jin Eun Kim (1977)
International Applications of Planning	Joseph Farrell (1974); David Wilson (1994, 1996); Segun Adesina (1974); Bernard Hoffman (1974); Ernesto Schiefelbein (1975, 1976); William Rideout & David Wilson (1975); Nelly Fiaz (1975); Jin Eun Kim (1975); William Evanco (1976); Garreth Williams (1976); Kjell Eide (1976); Jong Chol Kim (1976); Thomas Hart, James Mauch, & Gregory LeRoy (1976); Zbigniew Sufin (1976); Robert Crowson (1976); Hooper Gramlich (1977)

Table 2
ISEP Journal, 1984 to 1989

Theme	Sample Authors
Technical Aspects of Planning	Bruce Pesseau (1985); Brad Chissom (1985); Dorothy Sakamoto (1985); Glen Earthman (1986); Milan Mueller & Deborah Rackerby (1989)
Strategic Planning	Grover Baldwin (1986); Richard Featherstone, Martha Hesse, & Robert Lockhart (1986); Jeffrey Gilmore & Gregory Lozier (1987); Robert Riggs & Tom Valesky (1989)
Alternatives to Rational Comprehensive Planning	Russell Davis (1985); Dan Inbar (1985, 1986); Don Adams (1987); Ron Lindahl (1987); Carl Candoli (1988)
Operational Planning	Bruce Pesseau (1986); Anta Nazareth (1986); Howard Nelson (1987); Grover Baldwin (1989)
Needs Assessment	Belle Ruth Witkin & J. Nicolls Eastmond (1988); Belle Ruth Witkin (1989); Laura Weintraub (1988, 1989)
Relationships between Policy and Planning	Marcella Fowler (1984); Allan Guy (1984, 1988); Perry Johnston & Joseph Moore (1986); Perry Johnston & H. G. Niedermier (1987); Howard Nelson (1987)
Evaluation and Feedback Loops in Planning	Bob Carlson, Phyllis Paolucci-Witcomb, & Herman Meyers (1986); Gail Schneider (1986); Barbara Breier (1986)
Site-based Planning	John Crawford & Susan Purser (1988); Maridyth McBee & John Fink (1989)
International Applications of Planning	Roger Kaufman (1984); K. W. Evans (1984); Hector Correa, Don Adams, & Salomon Cohen (1986); Alwin Miller (1986); Maria Teresa Beboredo & Juan Carlos Bruera (1987); Stanley Nyirenda (1988); Roberto Algarte & Ron Lindahl (1988)

Table 3

ISEP's 1991 Book: Educational Planning: Concepts, Strategies, and Practices

Theme	Sample Authors
Rational Comprehensive Planning	Herb Sheathelm; Rima Miller & Joan Buttram; Art Stellar & John Crawford; Sandy Anderson; Nancy Kalan & Suzanne Kinzer; Keith Martin
Strategic Planning	Peter Obrien, Roger Kaufman, Gary Awkerman, & Ann Harrison
Alternatives to Rational Comprehensive Planning	Don Adams; Doug Hamilton; Bob Carlson; Dan Inbar
Needs Assessment	Belle Ruth Witkin
Relationships between Policy and Planning	Ken Tanner; Perry Johnston & Annette Ligett; Robert Stephens; Hal Hagen

Note: R. V. Carlson & G. Awkerman (Eds). (1991). *Educational planning: Concepts, strategies, and practices*. New York: Longman.

Table 4

ISEP Journal, 1990 to 1995

Theme	Sample Authors
Technical Aspects of Planning	John McKnight & Raymond Taylor (1990); Richard Kraft & E. Warren Tyler (1990); Hector Correa (1995); Robert Henry (1995); Milan Mueller, Bruce Silva, William MacPhail, & K. C. Bibb (1995)
Rational Comprehensive Planning	Ty Handy (1990); Maria Chavez & William Medlin (1993); Aaron Donsky (1995)
Strategic Planning	Linda Lyman (1990); Jerry Herman (1990); John Keedy (1990); Bradley Rieger (1993)
Alternatives to Rational Comprehensive Planning	Dan Inbar (1993); Karen Hicks (1993); Bill Cunningham & Donn Gresso (1993)
Operational Planning	Daniel Egeler (1993); Kathleen Westbrook (1993); J. L. Flanigan (1995)
International Applications of Planning	Mark Baron (1990); Rigoberto Tizcareno (1993)

Table 5
ISEP Journal, 1996 to 2000

Theme	Sample Authors
Alternatives to Rational Comprehensive Planning	Mike Richardson, Paula Short, & Ken Lane (1997); Don Adams, Thomas Clayton, & Michael Rakotomanana (1997); Hasan Simsek (1997); T. C. Chan (1999); Selahattin Turan (1999); Reg Urbanowski (1999); Adam Nir (2000), Walt Polka (2000)
Operational Planning	Ken Tanner (2000); Randy Dunn (2000); Elizabeth Meuser (2000); Mike Richardson, T. C. Chan, & Ken Lane (2000)
Needs Assessment	Belle Ruth Witkin (2000)
Relationships between Policy and Planning	David Wilson (1999); Jaekyung Lee (2000)
Evaluation and Feedback Loops in Planning	David Wilson (1997); Tim Molseed (1997)
Site-based Planning	Adam Nir (2000)
International Applications of Planning	T. C. Chan (1999); T. C. Chan & Ming He (2000); Rafael Espinoza (2000)

Table 6
ISEP Journal, 2002 to Present

Theme	Sample Authors
Rational Comprehensive Planning	T. C. Chan, Jessie Strickland, & Harbison Pool (2002); Ganga Persaud & Trevor Turner (2002); Ganga Persaud, Trevor Turner, & Tanya Persaud-White (2002)
Strategic Planning	Randy Dunn (2002); Dan & Sheila King (2002); Camille Rutherford (2009); Shannon Chance & Brenda Williams (2009)
Alternatives to Rational Comprehensive Planning	Melvin Peters (2002); Susan Everson (2006); Walt Polka (2007); Aimee Howley, Craig Howley, & William Larson (2007); Ron Lindahl & Bob Beach (2007)

Operational Planning	Ken Tanner & Scott Anderson (2002); Adam Nir (2002); Kianne Koehnecke (2002); T. C. Chan, Eric Tubbs, Rory Rowe, & Leslie Webb (2006); Charles Reavis & Walt Polka (2006); Ken Tanner (2006); T.C. Chan, Judy Patterson, Eric Tubbs, & Daniel Terry (2007); Aimee & Craig Howley (2008)
Relationships between Policy and Planning	Annette Ligett, Perry Johnston, et al. (2006); Adam Nir (2006); Virginia Roach (2006); Ori Eyal (2007)
International Applications of Planning	Donna Ferrara (2002); T. C. Chan (2002); Selahattin Turan (2002, 2008); Ron Lindahl & Russell Mays (2002); Mahmoud Abdeen (2006, 2008); Ekber Tomu (2007); Cemil Yucel (2008); T. C. Chan & Yiping Wan (2008); Ali Balci & Yelmaz Kussad (2009)
