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ISEP

Celebrating the 50ᵗʰ Anniversary of ISEP

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Editorial Review Board
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International Society for Educational Planning

EDUCATIONAL PLANNING
A JOURNAL DEDICATED TO PLANNING, CHANGE, REFORM, AND THE IMPROVEMENT OF EDUCATION

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A Special Issue Celebrating the 50th Anniversary of ISEP

FROM THE EDITORS

This issue of Educational Planning is specially dedicated to celebrating the 50th Anniversary of the International Society for Educational Planning. Happy Birthday, ISEP! Let me share with our readers an ISEP birthday present from ERIC. The ERIC record shows that articles published in Educational Planning have been downloaded 5704 times in the first six months of 2020. This is quite a record. Thank you to all our contributors who worked to make our journal strong. Thank you to all members of the Editorial Board to help uphold the quality of the journal.

A special thank is expressed to Abebayehu Tekleselassie, our President, and Angel Ford, our Vice-President, for their impressive addresses to the ISEP 50th Anniversary. They have shared their insights on the issues and challenges of educational planning in the past, the present and the future.

Articles in this issue are specifically selected for this celebrating event. First, Beach presents a general planning template as well as five recognized and two emerging processes for planning with a discussion of their uses. Then, Kaufman reviews how we are doing in delivering value and suggests two types of leadership and planning for us to transform ourselves: Outside-in and Inside-out leadership in planning. This is followed by Lemoine and Richardson who claim that college and university administrators are attempting to determine global scope coupled with the impact of technology for innovation and change; however, the COVID-19 pandemic created change and fear gripped higher education and forced change that was totally unexpected.

Special appreciation is also expressed to ISEP past presidents, Glen Earthman, Dan Inbar, Walt Polka and Donna Ferrara who reflected upon their heartfelt associations with the Society: the people, the places and the things. ISEP is simply a loving and caring family.

Donna Ferrara is also a former ISEP Glen Earthman Outstanding Dissertation Award winner. She, with two other award winners, Maartje van den Bogaard and James Wright, share with us their experiences of how the honors they received as award winners have helped them open many professional opportunities. They complimented the senior members of the Society as supportive mentors.

Despite the wide spread of COVID-19, the year 2020 has been a great year for ISEP with continued growth under great leadership and enthusiastic member support. Let us start our next 50 years with continued courage, confidence, love and care for one another.

Editor: Tak Cheung Chan
Associate Editors: Walt Polka and Peter Litchka
Assistant Editor: Holly Catalfamo

August, 2020

ABOUT THE AUTHORS

Robert H. Beach, a retired professor of educational systems, has engaged in planning for most of his career. He has been a secondary science teacher, Principal, Professor, and Academic Dean in the United States; a Fulbright Scholar, Senior Lecturer in Planning at the University of Malawi in Malawi, Africa; and a Professor of Planning and Decision Making in Quito, Ecuador. His specialty is theory in educational planning. He has also served as the Secretary for the International Society for Educational Planning and is a co-recipient of their David Wilson Award, and Executive Director for the International (National) Council of Professors of Educational Administration.

Glen I. Earthman possesses fifty years' experience in the field of education. He has taught extensively on the subject of educational facilities for over forty years at Virginia Tech and consulted on many school systems. He has authored six books on the subject of planning educational facilities, several book chapters, and published extensively in professional journals on this subject. He continues a schedule of research in the field of school facilities and advising students.

Donna L. Ferrara, PhD, is Associate Professor Emerita, Long Island University, New York. Her primary research interests are school reform, school restructuring, school transformation, and leadership. She has studied decentralization and school improvement efforts in the United States, Italy, and Belarus. Prior experience also includes administrative posts in the areas of curriculum, staff development, planning, evaluation, and research as well as in the areas of training administrators and teachers in undergraduate and graduate programs. In retirement, she continues to conduct original research, more recently evaluating funded programs in schools with violence prevention programs that deliver academic support and assist students at all levels to develop cognitive and emotional tools to foster social development, nonviolent communicative behavior, and good decision making.

Angel Ford began working in education in 2007 and performed a variety of roles in K-12, including teacher, guidance director, assistant principal, and principal, until she moved to higher education in 2013. She has worked on a number of research projects and on an international university partnership. She was a Fulbright Scholar to Ethiopia for the 2019-2020 academic year. Her research interests include partnerships; comparative studies; unequal learning environments; closing the opportunity gap in a variety of settings worldwide; motivation, aspirations, well-being, and persistence.

Dan Inbar is Professor Emeritus of the Hebrew University, Israel. He has a Ph.D. from the University of California, Berkeley, U.S.A. His main research and teaching interests are educational policy, educational planning, and organizational management and leadership. Dr. Inbar served as Director of the School of Education and Associate Dean of the Faculty of Humanities and was the Chair of Shifman Cathedra of Secondary Education. He has served in many committees in the Ministry of Education, Israel, and as the Chair of the National Committee of Parental Choice, and the Chief Educational Scientist of the Israeli

Parliament. Dr. Inbar was a research fellow at Stanford University, at OISE, Toronto, at the Institute of Education, London University, and at Melbourne University. He also taught for four years at Harvard Summer School. For twenty years, Dr. Inbar has been the editor of the scientific journal "Dapim" which focuses on educational research and teacher training. He established the education unit at the Van Leer Jerusalem Institute in 2006.

Roger Kaufman, PhD, CPT, is professor emeritus, Florida State University, Senior Fellow at Florida TaxWatch, and has served as Distinguished Research Professor at the Sonora Institute of Technology (Mexico). He received ATD's Distinguished Contribution to Workplace Learning and Performance award. Also, he is a past president, honorary life member and Thomas Gilbert Award winner, all with ISPI. Kaufman has published 41 books and 320+ articles on strategic planning, performance improvement, talent development, leadership, quality management and continual improvement, needs assessment, management, and evaluation. He consults world-wide with public, private and NGO organizations and universities and most recently with the President and Minister of Tourism of Panama, the Civil Service Commissions of Taiwan, the Tze-Chain Foundation of Science and Technology (Taiwan), as well as the Department of Labor, Korean Government. The International Society for Performance Improvement (ISPI) has created in his honor the Roger Kaufman Award that *recognizes the continuous achievement of measurable positive societal impact by an individual or organization*.

Pamela A. Lemoine, Ed.D., is an assistant professor and program coordinator for the Global Leadership doctoral program at Troy University. Dr. Lemoine previously held a faculty appointment at Columbus State University. Dr. Lemoine completed a BA in English, an MA in Educational Technology, and an EdD in Educational Leadership from the University of Louisiana Lafayette. Before entering higher education. Dr. Lemoine served as an elementary/middle school principal, district supervisor and director. Dr. Lemoine's interests include online learning, educational leadership preparation, and currently emerging challenges for P12 and higher education institutions due to COVID-19.

Walter S. Polka, a native of Niagara Falls, New York, is a graduate of the State University of New York at Buffalo (B.A. in History-1968 and Educational Doctorate-1977) and Niagara University (M.A. History-1970 and M.A. Education-1971). Dr. Polka also completed post-doctoral studies at Harvard University and Florida State University. During his 35 years in public education, he was a high school social studies teacher, district-wide curriculum director, assistant superintendent for curriculum and instruction, as well as serving for 13 years as a superintendent of schools of the Lewiston-Porter School District, New York. Currently, Dr. Polka is Professor of Leadership at Niagara University and Coordinator of the PhD Program in Leadership and Policy. He has chaired over 50 doctoral dissertations at three different universities: Georgia Southern University, Niagara University, and Addis Ababa University in Ethiopia. His publications include five books and over 60 book chapters and peer reviewed articles related to constructivist teaching, effective leadership, policy development, coping with change, and diversity issues. He has

given over 300 presentations at more than 175 conferences/workshops in 45 states of the United States as well as over 60 sessions at 32 international conferences in 25 different countries worldwide. Dr. Polka has received several honors and awards during both his school district and higher education careers and is most proud of having been recognized in 2013 as the recipient of the *Distinguished Alumni Award* from the State University of New York at Buffalo Graduate School of Education.

Michael D. Richardson, Ed.D., is professor of educational leadership at the Global Tertiary Institute. He previously held faculty and administrative appointments at Columbus State University, Western Kentucky University, Clemson University, Georgia Southern University, Mercer University and Southeastern Louisiana University. He completed a BS and MA in Education at Tennessee Technological University and was awarded the EdD in Educational Administration from the University of Tennessee. Dr. Richardson served as founding editor of the Journal of School Leadership and Contemporary Issues in Educational Leadership, and editor of The Journal of At-Risk Issues. His current research areas include leader resiliency, phenomenology, and technology.

Abebayehu Tekleselassie is Associate Professor of Educational Leadership and Administration at the George Washington University. His research examines the recruitment, retention, and career transitional trajectories of school leaders. His findings assist policy makers as they identify appropriate tools to retain principals in high poverty schools where principals' value-added effect is greater than those of low poverty schools. Extending his global outreach, Dr. Tekleselassie also conducts research on school principal development in Ethiopia where his work was published in peer-reviewed journals and presented at UCEA, ISEP, and AERA. Dr. Tekleselassie is the current President of the International Society for Educational Planning.

Maartje van den Bogaard, PhD, has been working in higher education and research for 18 years. She holds a MSc in Education and a PhD in Engineering Education. She is fascinated with the interface between educational research and policy and administration, especially with the question how these two different approaches to education can enhance each other. She currently oversees an upper-secondary STEM teacher training programme in TU Delft, the Netherlands. She and her team created a new programme that is based on principles of professional learning communities. She supervises research in the areas of student success and curriculum change.

James M. Wright is an Associate Professor of Instructional Technology at Kennesaw State University, United States of America. With a 25-year career in technology and teaching, Dr. Wright has degrees from the University of Georgia, Vanderbilt University, and Kennesaw State University. His research agenda focuses on distance learning, technology integration, and the instructional effectiveness of technology. His specialties include technology integration, professional development, online learning, and multimedia development. Dr. Wright's international activities includes working with schools in Ghana, Brazil, Colombia, Ecuador, and Costa Rica.

The President's Address to ISEP's 50th Anniversary

REAFFIRMING ISEP'S HUMANISTIC VISION OF TRANSFORMING EDUCATION IN THE WORLD

ABEBAYEHU TEKLESELASSIE
The George Washington University, U.S.A.

Over the last two years, we have been engaged in preparing for the 50th birth of the International Society for Educational Planning (ISEP) in Washington, DC, where the association was founded in 1970. To commemorate the significance of this turning point in ISEP's history, a special 50th-anniversary planning committee was established. The committee's work resulted in a comprehensive program that includes thematic sessions tailored to the anniversary, celebratory events, site visits, invited talks, and a session honoring the founding members of the association. Although we canceled the Washington, D.C. conference in October 2020 due to COVID-19, we remain committed to continuing to plan for our anniversary in October 2021, when we meet in person.

The current global health crisis has affected our educational systems in unprecedented ways. Schools are closed throughout the world and such closure carries high educational, social, and economic costs for students, their families, and communities. The educational wastage and learning slide resulting from the outbreak deprive opportunities for growth and development particularly for students from marginalized groups of the society who tend to have limited educational opportunities and resources beyond school. While schools have continued virtual learning in countries where the instructional technology infrastructure capacities exist, opportunities for real-world connections such as spending time with peers and human interaction are missing in the lackluster online learning environment. In comparison, in most developing countries, the situation is even worse as there is no internet access in schools, leaving children in complete separation from any form of learning and educational opportunities. School closure and social isolation will worsen particularly the vulnerabilities of marginalized children, most of whom live in abject poverty in developing countries. With education interrupted, non-government organizations and donor agencies working in these countries (such as Save the Children and UNESCO) worry that children are at higher risk of abuse, neglect, violence, and exploitation since the pandemic began six months ago. Experience from the Ebola epidemic has shown that the longer children are out of school, the less likely they are to return (UNICEF, 2015a), and young women and girls are most susceptible to dropping out of school in developing countries where tradition, patriarchy and lack of access to capital forced females out of school even before the pandemic.

As an international association committed to the advancement of research, teaching, and scholarship in educational planning, it is imperative to ask what we could do to support educators and policymakers in their quest for tools to overcome crisis moments such as COVID-19 and as they prepare to reopen schools in the near future. The challenges caused by the pandemic render any past blueprint or playbook ineffective and strategies and solutions one could offer are tentative. Empirical studies on the topic are lacking and instruction on how to manage fortuitous events like this virus is scarce. Crisis moments demand creativity but also us discovering our enduring values as an international association because our identity shapes our decisions and actions (be it

during COVID-19 or other times). ISEP is a unique association in this regard and reflecting on our uniqueness is a vital force in our search for solutions to the most systemic challenges of our school systems.

Our uniqueness begins with the diversity of our membership. Take a gander at who we are in terms of the organizations we represent, the geographic location of our institutions, where we live, our past and present experiences, the nature of our research agenda and our intellectual pursuit, and so on. A scant introspection will tell you that we are a very diverse group of professionals. Many of us are professors at higher education but have had a distinguished career prior in K-12 systems. The majority of our membership comes from educators, but we have individuals in other niche areas such as building design and architecture who have joined ISEP because of the meaningful benefit their affiliation affords them. The majority of us live in the United States but a significant number of us also come from other regions of the world including Africa, Asia, the Caribbean, the Middle East, and Europe.

In addition to being a diverse group, we have the tradition of holding our annual meetings in various parts of the world. Past conference locations include Toronto, Canada; Bologna, Italy; Budapest, Hungary; North Cyprus Republic; Lisbon, Portugal; Port-of-Spain, Trinidad, and Istanbul, Turkey. By bringing our annual meetings to other countries, we created network opportunities, increased our global footprint, and recruited new members who joined the ISEP family.

ISEP's diverse makeup and global outreach are assets as we play our part in addressing the most persistent challenges in our local and global spaces. As we entered the new millennium in 2000, critical issues facing education as other social services have increased in their complexity, depth and broader impact. UNESCO's (2020) recent report indicates that more than 262 million children and youth are out of school in the world. Six out of ten are not reaching basic literacy and numeracy after seven years of education. Although most out of school children live in economically disadvantaged families in developing countries, high income and middle-income countries also have their own set of challenges. For example, educational stratification or income-based achievement gap have grown over 50 years (between 1964 and 2015), with a marginal decline in the United States, Belgium, Ireland, Norway, Poland, Hungry, Iran, and Thailand (Chemielewski, 2019).This suggests that low-income students do not receive the same quality education as their counterparts from middle and high-income families. This alarming revelation indicates that education is still an unfulfilled promise for the majority of the poorest families around the world.

Equity, access, and many other persistent educational challenges are global in nature and require solutions that are coordinated, systemic, and sustainable. In a world that is increasingly interconnected and interdependent, strategies that are country-specific result in unsatisfactory or less than optimal outcomes, even in countries where resources are sufficiently available. Any victory in universalizing education within a few countries may give a semblance of success but is not sufficient. This is because a world that leaves behind a significant portion of its most vulnerable populations from access to basic education will not only fail to prosper but also pays a heavy cost both in the short and long term. Children out of school are recruiting grounds for terrorists and armed groups, and subject to sex trafficking and other forms of exploitation. Today, there are 58 non-state armed groups in 15 countries that actively recruit children and youth for violent extremism and international terrorism (Darden, 2019), whose impact stretches beyond the source country to the rest of the world disrupting our social, economic and public livelihood.

Education is a human right and an integral vessel for sustainable development; however, progress in education takes global leadership and a coordinated effort. While the UN and its affiliate agencies and NGOs including UNESCO and UNICEF, are contributing their part to ensure access to education for all citizens in the world, professional associations such as ISEP can also play a role toward the fulfillment of this goal. We are a small association but our size does not measure the depth and breadth of our dreams, our commitments, and our collective efficacy to transform the world through the power of education.

A good place to start is our conferences held in different countries and regions of the world. We can leverage these meetings as a conduit to create partnership opportunities as well as to recruit new members who may engage in joint research projects that center on pressing problems of practice and policy at the host country. Veteran ISEP members may take a leading role in initiating the research projects by involving new members in the host countries, where the team may share data, ideas, expertise, and resources throughout the life of the project. To make the findings widely available to the international readership, the project team can present their research at the ISEP annual conference and publish it in *Educational Planning*, broadening the Journal's portfolio as a truly international outlet.

In addition, we can leverage conference venues as a springboard to meet key decision-makers, practitioners, and policymakers from K-12 and higher education who can provide invited talks on the state of education in the host country. Such information is vital to gain insight into pressing education challenges and best practices from the region to inform the work we do at home and to foster new thinking in the field. Such efforts will not only elevate ISEP's visibility but also increase its impact by providing our members with essential, current, globally relevant data and networking opportunities.

The economic difficulties caused by the pandemic and the mitigation measures we use as we safely reopen schools in the fall reduce the resources we have to travel to conferences. Significant income loss will occur, and a sense of frustration, isolation, and fear may continue to concern us until we conquer the virus. However, this should not stop us from being difference makers. As difficult and as real as the challenges we face due to the pandemic are, they are still smaller than our dreams and aspirations to change the lives of each child, in each community, each village in our global community.

I am honored to serve as the President during this historic moment as ISEP marks its 50th anniversary, working along with my colleagues who deeply care about the association and who are always willing to share their expertise so openly in service to education and educational planning, locally and globally.

The world needs more international research collaboration and more citizens that are global. I urge ISEP members to continue to engage in efforts that expand our international outreach and to continue to adapt a more global approach to addressing educational challenges that arise during this time of health crisis, as well as during other times, particularly in resource-constrained and vulnerable communities.

Our membership is our strength and the engine behind all the work we do. More members means more power, more influence, more voices, and more expertise. In the coming years, please consider recruiting new members, including your graduate students, K-12 practitioners, and individuals who work for non-government organizations. Also, consider nominating yourself to

the board and other leadership positions or volunteer to the conference committee as we expand our international outreach in other regions (such as Africa, Asia, and Australia). With preparation underway for the 2022 annual meeting in South Africa, we are excited about the opportunity of expanding our outreach to Africa, a region we have not had the opportunity to serve in the past.

I close my remark with a quote from UNESCO:

There is no more powerful transformative force than education – to promote human rights and dignity, to eradicate poverty and deepen sustainability, to build a better future for all, founded on equal rights and social justice, respect for cultural diversity, and international solidarity and shared responsibility, all of which are fundamental aspects of our common humanity. (UNESCO, 2015, p.5).

In that spirit, I look forward to seeing you all in October 2020 during our online meeting, but also in 2021, when we meet in person. Until then please stay safe, well, and healthy with your loved ones.

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The Vice President's Address to ISEP's 50th Anniversary

ISEP IN 2020

ANGEL FORD
Liberty University, U.S.A.

Greetings!

As ISEP crests the 50th year of existence, I would like to share a few of my personal reflections as an active member, board member, and officer; my surface thoughts on the current world situation; and my hope for the future of educational planning. Even though I have only been a part of ISEP for the last five years, I have experienced many benefits from my connection. I have enjoyed attending the international conferences, presenting multiple times on a variety of topics, watching and learning from colleagues from all over the world, and being involved with the Educational Planning journal. I have made deep and lasting friendships and professional contacts that have led to teaching opportunities, publications, and even contributed heavily to my being awarded a Fulbright Scholar grant to teach and conduct research in Ethiopia for the 2019-2020 academic year.

In my time, I have also watched the Society go through a number of challenging events, including but not limited to the death of an active ISEP president; the change of venue for a conference at the eleventh hour, and the shortening of the same conference at the new location, due to an impending hurricane. I have watched the officers, board, and members rally together to remain positive, hopeful, and successful in carrying on amidst these and other trials and obstacles. In sum, I have grown as an individual and as a professional during my association as I have observed and participated alongside my international colleagues.

My introduction to ISEP in 2015 came through a colleague, and I was quickly drawn to the international flavor and the focus on the critical nature of planning. My professional background before entering the field of education in 2009 was in the United States Air Force where we regularly practiced contingency plans. We were trained to be forward thinking and prepared for the unexpected. We were prepared for illness, natural disasters, conflicts, etc. Over the years, I have tapped into this training while working in the field of education. As part of a K-12 building administration team, we prepared for illness, weather, natural disasters, active shooters, etc. As part of graduate schools in education, we also had contingency plans in place for a variety of events. We had not however, either in my time in the military or my time in education, prepared for a world that would require us to individually quarantine ourselves indefinitely for personal protection and the protection of others.

That brings me to the current state of the world. As I sit writing this short piece, we are experiencing an unprecedented global event, COVID-19. This pandemic has brought challenges to governments, businesses, institutions, organizations, and individuals. In fact,

it is hard to imagine anyone unaffected by this virus. Brick and mortar establishments have been closed indefinitely, or at least unable to operate the way they did before this event. Therefore, we are all, ISEP, as well as the rest of the world, in the midst of navigating life from the safety of our homes while contemplating the threat of future contagions as well as other impactful worldwide events.

The world has experienced this unprecedented situation simultaneously. Meaning, we as educators did not have in our existing literature, successful examples to emulate or unsuccessful examples to avoid repeating. Instead many educators have been rapidly learning together and sharing information as best we can to help others with the changes and challenges we are all facing. From all over the globe, educators have used experiences in our corners of the world to help others in different corners and to learn from one another. The mass of information being compiled on how individuals, schools, and institutions of higher education have dealt with COVID-19 has been unprecedented. The increase in open source data, trainings, etc. demonstrate the willingness to share knowledge and experience to help our fellow educators wherever they happen to be.

Based on my personal experience and observations during COVID-19, I look to the future of educational planning with much hope. Educational paradigms are shifting. I hope that through diversified and expanded resources, access to education could become more equitable globally. I see a renewed interest from policy makers and other stakeholders to have plans in place for a multitude of scenarios and to share those plans openly so that we are not all reinventing the wheel. I have seen mandates from governments to have plans for instruction that can be face-to-face, completely online, and a hybrid of the two. As we move forward, hopefully ISEP can be on the forefront of collecting and disseminating ideas for educational planning in the world after this extraordinary worldwide pandemic.

Given my position as Vice-President of ISEP, I look forward to working with many of the current members and attracting new members and watching the society continue to be a place to present and collect research and ideas around the needs of educators. I would like to personally challenge all researchers, educators, and educational leaders to consider what knowledge, perspectives, techniques, technologies, etc. have been helpful during this season and to share those through presentations and publications. What strategic plans have been put in place that were successful and which ones failed? What plans are being made for anticipated future events? How can we use what we have learned to reach students we were not reaching before? How can we disseminate information and education equitably in physical classrooms as well as those online?

Let us dive deep into our knowledge and experiences and listen attentively to others as we all share our experiences of planning through this worldwide event and prepare for the morphing landscape of education.

ISEP – YOUR PROFESSIONAL FAMILY

The International Society for Educational Planning (ISEP) was founded on December 10, 1970, in Washington, D.C. Over 50 local, state, national, and international planners attended the first organizational meeting. Since then the dynamics of educational reform throughout the world have demonstrated that there is need for a professional organization with a primary focus on educational planning and policy.

Mission

The mission of the International Society for Educational Planning (ISEP) is to improve education through the application of planning processes. This mission is elaborated through the functions of the Society:

o To advance the education of humankind through the application of knowledge, resources, and creative abilities of educational planners;
o To improve the knowledge, resources and creative abilities of educational planners;
o To encourage, support, guide and advance educational research and evaluation cooperatively with educational planning;
o To support and assist educational institutions in the establishment and improvement of organizational entities, activities, and programs which enhance the effectiveness of educational planning;
o To enlarge the vision of educational administrators and the effectiveness of educational programs through knowledge and use of educational planning techniques; and
o To improve the educational achievement and feelings of self-worth of all students through the planning for and improvement of teaching and learning experiences.

Purpose

The International Society for Educational Planning was established to foster the professional knowledge and interests of educational planners. Through conferences and publications, the Society promotes the interchange of ideas within the planning community. The membership includes persons from the ranks of governmental agencies, school-based practitioners, and higher education.

The Journal

The peer-reviewed journal of the Society, *Educational Planning*, is published quarterly and circulates to individual and institutional members in more than twenty countries. Theoretical, empirical, and application papers are encouraged. Membership in the society includes a subscription to the journal.

Annual Meetings

In the fall of each year, ISEP members meet to present and discuss papers, and to share ideas less formally. These papers are often published in Educational Planning. This is the occasion for collegial dialogue, for establishing and renewing friendships, and for professional growth. A highly prized aspect of these conferences is the opportunity they

afford for dialogue and reflection between those whose orientation to planning is primarily academic and those who carry out planning in educational and governmental institutions. The Society is truly a meeting ground for the world of academe and the world of practice. In recent years, ISEP has held its annual meetings in the following cities worldwide:

2019	Lisbon, Portugal
2018	Charleston, South Carolina, USA
2017	Toronto, Canada
2016	New Orleans, Louisiana, USA
2015	Baltimore, Maryland, USA
2014	North Cyprus Republic
2013	Niagara Falls, New York, USA
2012	Kansas City, Missouri, USA
2011	Budapest, Hungary
2010	Alexandria, Virginia, USA
2009	Savannah, Georgia, USA
2008	Istanbul, Turkey
2007	Minneapolis, Minnesota, USA
2006	Pittsburgh, Pennsylvania, USA
2005	Bologna, Italy
2004	Washington, D.C., USA
2003	Seattle, Washington, USA
2002	Istanbul, Turkey
2001	Atlanta, Georgia, USA
2000	Port-of-Spain, Trinidad
1999	Indianapolis, Indiana, USA
1998	Toronto, Canada
1997	Philadelphia, Pennsylvania, USA
1996	New Orleans, Louisiana, USA
1995	San Diego, California, USA
1994	Nashville, Tennessee, USA
1993	Niagara Falls, New York, USA
1992	Virginia Beach, Virginia, USA
1991	Oklahoma City, Oklahoma, USA
1990	Atlanta, Georgia, USA
1989	Denver, Colorado, USA
1988	Austin, Texas, USA
1987	Toronto, Canada
1986	Washington, D.C., USA
1985	Kansas City, Missouri, USA
1984	New Orleans, Louisiana, USA
1983	Burlington, Vermont, USA
1982	Tallahassee, Florida, USA

HONORING THE PAST PRESIDENTS OF ISEP

1970-71 **Ronald Luckie** – Department of Education, Georgia, USA

1972-73 **Bernard Kapler** – Educational Policy Research Center, Syracuse University, NY, USA

1974-75 **Don Adams** – University of Pittsburgh, Pittsburgh, Pennsylvania, USA

1976-77 **Thomas Olson** – Northwestern Regional Educational Laboratory, Portland, OR, USA

1978-79 **Cicely Watson** – University of Toronto, Ontario, Canada

1980-82 **C. Kenneth Tanner** – University of Tennessee, Nashville, USA

1983-84 **Charles Chase** – Northwestern Regional Educational Laboratory – Portland, OR, USA

1985-86 **Herb Sheathelm** – University of Connecticut, Storrs, Connecticut, USA

1986-87 **Gary Awkerman** – Charleston County School District and The Citadel, South Carolina, USA

1988-89 **Robert V. Carlson** – University of Vermont, Burlington, Vermont, USA

1990-91 **George A. Crawford** – University of Kansas, Lawrence, Kansas, USA

1992-93 **Ken Ducote** – New Orleans Public Schools, Louisiana, USA

1994-95 **Dan Inbar** – The Hebrew University, Jerusalem, Israel

1994-95 **Glen I. Earthman** – Virginia Polytechnic Institute & State University, VA, USA

1996-97 **Walter Polka** – Lewiston-Porter School District, Lewiston, New York, USA

1998-99 **William McInerney** – Purdue University, West Lafayette, Indiana, USA

2000-01 **David N. Wilson** – University of Toronto, Ontario, Canada

2002-03 **Donna Ferrara** – Long Island University, New York, USA

2004-05 **Ganga Persaud** – Clark Atlanta University, Atlanta, Georgia, USA

2006-07 **Selahattin Turan** – Osmagazsi University, Turkey

2008-09 **Aimee Howley** – Ohio University, Athens, Ohio, USA

2010-11 **Tak C. Chan** – Kennesaw State University, Kennesaw, Georgia, USA

2012-13 **Linda K. Lemasters** – George Washington University, Washington, DC, USA

2014-15 **Adam Nir** – The Hebrew University, Jerusalem, Israel

2015-16 **Mary Chandler** – Kennesaw State University, Kennesaw, Georgia, USA

2016-19 **Peter Litchka** – Loyola Maryland University, Baltimore, USA

Thank you very much for your invaluable contributions to
The International Society for Educational Planning

A PRELUDE TO PLANNING

ROBERT H. BEACH

SYNOPSIS

Planning is presented as a process for developing desired organizational change focused on creating an alternative future more conducive and different from the one anticipated. A general planning template as well as five recognized and two emerging processes for planning are presented with a discussion of their uses; they are Rational Comprehensive, Bounded Rational, Mixed Scanning, Incremental, Goal-Free, Scenario, and Experience-Based planning. Issues arising from the nature of the unknown futures flowing from change are also discussed. The competition that can arise from the manipulation of such futures is noted.

SEVERAL EDUCATIONAL PLANNING MODELS:
THOUGHTS ABOUT PLANNING

This article suggests how our planning activities in the present might influence the future. This is really what planning and its designed changes are all about. When we plan, we are creating a design that may allow us to move into a different future, and by the implementation of our plans change arises. A new, changed future emerges from the many possible and from the one that otherwise might be coming. A desired future is hopefully better suited to our individual and the organization's interests. In general terms, such futures begin with processes for the creation of a plan for implementing change. The processes are not in themselves change; rather, they bring into existence ideas that are blueprints for the creation of change.

The beginning of planning relevant to current educational activity is lost in history and generally pertinent from about 1800 AD and really only for the better part of the last 75 years. For example, tools such as the Critical Path Method (CPM) and the Program Evaluation and Review Technique (PERT) evolved in the 1950s. Everett Rogers' (1995) seminal work on the diffusion of innovations was first published in 1962. Since this time, theories of planning and their approaches to creating change have been evolving and, in some cases, they have done so profoundly. These approaches to planning can lead to different outcomes. Consider them as different futures.

When a new school is needed, plans are designed. But nothing has changed other than that the plans exist. Only when some positive action relative to the plan's implementation occurs, such as a school foundation being laid, is the future changed. The reality here is that anything that affects the plans can change the future. Even the passage of time itself can change things. In reality, everything is in flux.

Time stretches from where we are now, the present, forward into a future only partially knowable. If we could see into the future, we might find a brighter one that may be coming. Also, we can experience foreshadowing that is cast backward to the present and could raise concerns with what may be coming. What is coming may not be in our best interest. So, we may seek to bring about change derived from plans that create a different future, one more favorable.

Multiple and varied processes exist for creating change. Figure 1 illustrates one basic generalized process for the creation of plans designed to bring about change. While not being drawn

to scale, it presents a simple universal process with five components for creating change. These are preplanning, thinking about making the change; readiness, ensuring that the major elements of the organization are ready to take on the change process; planning, creating the designs for generating the change components; implementation, putting the change components in place; and institutionalization, ensuring that the initial implementation has taken hold. These five components constitute a basic, generalized, and workable change process. The first three involve the design process itself. Implementation and institutionalization involve actions of putting the plan into place and the integration of nascent change into the organizational culture -- "this is the way we do things here."
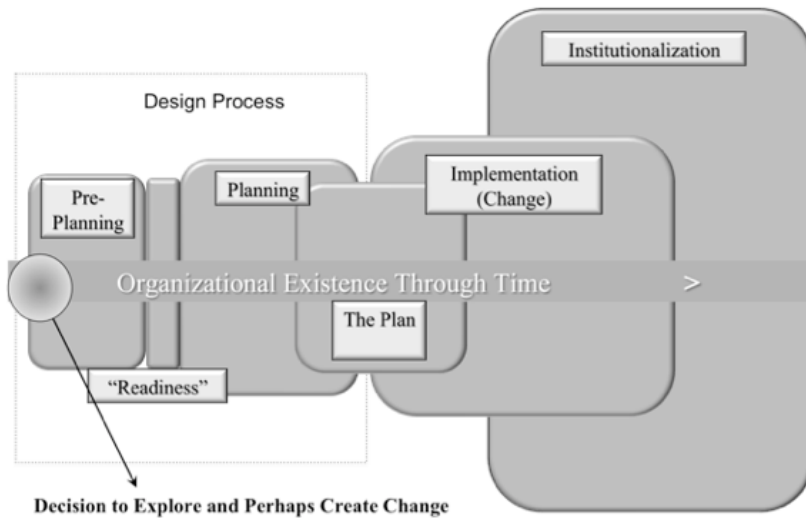
Figure 1: A planning process for creating organizational change.
Adapted from "Overall Knowledge Bases Underlying the Organizational Improvement Process", by author, Planning and Changing, 2004 Volume 35/number 1&2, Beach, R. H. & Lindahl R. A., Page 11, extended and improved.

This is not to suggest that much change is actually attempted by processes such as this. Most planning is ad hock, attempted by well-meaning but inexperienced change agents and, thus, only partially successful. However, it is generally touted as successful. A planning process must define plans that anticipate what will be undertaken in the future, even before that future is known! This opens the plan to problems, even failure, when the anticipated future does not arrive.

Generally, simple changes are easy to undertake by definition; however, most change is not simple. Mostly it is convoluted, tortuous with parts rolling together, politicized, and impacted on by both individual and group desires and hopes. Not all change efforts are totally successful. Perhaps the major portion of these efforts will, at least partly, falter. Change may not be desired for some of these efforts; rather, they are simply to satisfy a political request to document that the organization is doing something. However, some efforts can result in positive happenings.

It is not my belief that some magic process for creating change exists, and that to be successful one must capture the wizard and learn the secrets. Every change effort is different,

even when designed from the same template–for example, the many responses to a state-mandated "improvement" or "reform" program.

A change effort will involve people who are different, that is, different backgrounds, different skills, and different perspectives, each having desires that may differ from those of individuals in other groups. The desired change, and the composite elements of such change plans, will adapt and morph under your feet, and the program will require continued customization; that's if things are going well before implementation. So, while the planning process illustrated in Figure 1 promises change and can deliver, there is no guarantee that the future designed will be forthcoming.

It is important to stress that the change discussed here is about intentionally and purposefully shaping the future. However, futures are formed in many ways, some of which are neither intentional nor purposeful. When a stone-thrower's rock drops into a pool, the splash is interesting but what happens as a result of the ripples?

Some of your change efforts will not fail but just damage the surroundings. Consider what happened along the St. Lawrence River where the demographics of many school populations changed dramatically. This arose from the increase of enrollments that occurred for several years as a result of the influx of construction workers and their children. The parents were engaged in creating a fantastic canal leading into and from the Great Lakes. Overall, the canal was undoubtedly intentional, purposeful, and a successful change; however, school-wise the related change was not always positive, intentional or purposeful--there was collateral damage. School buildings were remodeled and renovated, including expansion, to accommodate the children of the construction workers. After several years the canal was finished, construction ended, and the workers and their children left. Now overbuilt and half-empty buildings had to be carried financially by local taxpayers for years. While this is on a larger scale, it is typical of many educational change efforts. The result was just one more of those unintended consequences.

SEVEN SPECIFIC PROCESSES FOR CREATING EDUCATIONAL PLANS

There are many processes for creating educational plans to bring about change. About as many different processes exist as there are planners. These plans typically go into greater detail than the process shown in Figure 1. Some are touted as *the* process. Five are well recognized in the literature and two are newer and emerging. All are outlined below. Multiple variants of most also exist. As an example, Strategic Planning is a variant of the rational models.

Educational planning processes can be thought of as falling on a continuum, one based on the intensity of a plan's information and analysis needs that create demands on time and other resources. Figure 2 depicts a continuum of these processes. Other than the experience-based model, all are well known in the literature.
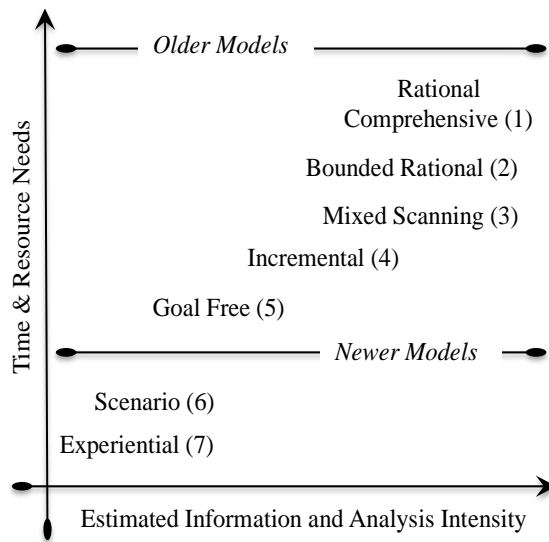
Figure 2. A taxonomy of approaches to some planning and change models.
Graphic design developed in 2020 by author.

Although people have engaged in thinking about planning for thousands of years, the top five models illustrated in Figure 2 have emerged over time from continuous, informal development beginning about the time of the World Wars. They are the results of reflection and experience. They can be thought of as modern. They were not derived scientifically and they have changed over time morphing into different formulations, and Rational Comprehensive models can be thought of as being obsolete. The Scenario and Experience-Based models are newer with the latter being almost new.

It is important to note that the literature discusses many such planning models. Some are profound; some are bush-league in the extreme. All, including those presented here, vary widely in operation. All of these models can overwhelm a novice potential user. However, these archetypes are few in number and most are discussed here. These models center on planning for educational purposes focusing on educational concerns. There are other planning processes that have a different focus. Examples noted on Amazon are: wedding planning, obviously planning focused on weddings; focus group planning; planning for interest groups; kitchen planning; retirement planning, etc. So, seven basic processes directly relating to educational planning are presented here. Perhaps six or seven can individually or collectively be applied to most topic areas, thus, giving rise to any number of different "planning" application theories. What follows is a discussion of the planning archetypes as seen in relation to education.

Rational Comprehensive Planning

Rational comprehensive planning largely arose, or evolved, from ideas and planning efforts emerging from multiple sources about the time of World Wars I and II. The fundamental concept behind this approach, and the several variants that exist, is that the users identify a primary goal, generate a comprehensive list of alternative paths or solutions to attain that goal, and then "rationally" select the best alternative(s) for goal achievement. By *no* means does this terminology suggest that

other approaches to planning are "irrational." It merely conveys that the selection among alternatives should be based upon pre-established, agreed upon, and measurable criteria. The earliest articulation of rational planning has become formally known as Comprehensive Rationalism and is considered as the seminal and perhaps the best expression of this model. In the model, goals and the means for their attainment are clearly defined. A logical series of steps, often linear, are typically prescribed. Ends and means are assumed to be separable and capable of eliciting widespread organizational support. The postulates of this theory require that all solutions to the problems of the proposed change be examined and that the "optimal" solution be chosen. Three basic objections to any pure form of this model exist. First, can *all* solutions really be examined? What is around the next corner? Second, the future consequences of any plan can only be assumed; they, of course, lie in the future. Third, given human psychological issues such as biases or bounding (limiting the problem's parameters), the form of the problem's presentation, i.e., how it has been framed (presented) and memory recall, etc., all raise questions as to the true rationality of educational organizations or, in fact, any of their decisions and plans.

In reality, the complexities of each institution's changing environment, its internal strengths and weaknesses, the readiness for change, the requirements for complete comprehensiveness, culture, needs, the specific planning variation (that is the alternative being used), and the stakeholders make this model's application a vastly intricate process. This was a template for a comprehensive rationalism known as *strategic planning*. Current thinking has evolved a strategic planning template or model that is more concerned with creating greater stakeholder involvement and therefore a model more in tune with other formulations.

Many variations of rational planning can be found such as short- and long-term planning. Although there are a plethora of specific formats for these models, most contain more or less the same basic elements, and without question the most familiar variant is *strategic planning*. Many accreditation agencies and states have required their public schools and universities to engage in a strategic model. There are a large number of specific formats or models for such use.

Bounded Rational Planning

Herbert Simon (1957) recognized that the comprehensive approach was so complex, resource intensive, and time consuming that it was generally impractical for most situations. He noted that the future consequences of most plans could only be partially forecast. Therefore, determining which solution among all possible is the optimal solution, a primary tenant of comprehensive rational planning, is difficult at best. He also accepted that human beings can only gather, analyze, and process a finite amount of information and, in selecting among alternative solutions, choices are often unduly influenced by emotions and/or psychological factors, rather than being truly "rational" or objective. These considerations led him along the steps illustrated in Figure 3 to develop a model that came to be known as the bounded rational approach, a more feasible, yet related, alternative.

1	Establish goals		6	Analyze alternatives
2	Need assessment		7	Establish goals
3	Identify resources		8	Develop objectives and implement
4	Determine objectives		9	Evaluate processes and performance
5	Search for alternatives		10	Adjust process

Figure 3. A basic bounded rational planning model in linear (step) form.
An interpretation from Brieve, Johnston and Young by author. After A. P. Johnston.

In a bounded rational model, limits are set on the range of alternatives and on the criteria that will be used to select among them. For example, cost limits might be set, as might time limits for implementation, minimum performance goals to be met, or particular organizational values that cannot be compromised. Then, rather than attempting to identify the "optimal" solution, the planning team would settle for a feasible or an acceptable solution, a compromise Simon termed *satisficing*. For example, although under a comprehensive rational approach it might be "optimal" (in terms of knowledge gain, networking, and future employment opportunities) for the teacher striving to become a school administrator to enroll full time at a premier university like Columbia, Harvard, or Stanford, it could be problematic for budgetary or convenience reasons and better to *satisfice* and attend a local university on a part-time basis while continuing to teach. Similarly, the university considering adding a doctoral program in educational leadership might "bound" its considerations to an Ed.D. program due to lack of faculty prepared with the strong research and statistical skills needed for operating a research-based Ph.D. program. In addition, the university might dismiss from consideration any distance education components due to lack of technological resources or a deeply held university value for "high touch" rather than "high tech" instruction.

Mixed Scanning

Amitai Etzioni (1967) saw the value in combining some concepts of the bounded rational and incremental (see below) models in an organization's overall planning process, capitalizing on the strengths of each. The model reflects Etzioni's recognition that an organization's planning process does not need to be monolithic. There are aspects of the planning process, such as divining a future, which may best be served by the incremental model; however, for other aspects a bounded rational planning process could be more appropriate.

Perhaps an organization's budget can be planned incrementally. However, some budget categories require more complex, rational planning approaches, such as the purchase of property for future construction, the construction of new facilities, or even major renovations. In this scenario, budget planning would then follow a mixed scanning model. However, planning without some reasonable understanding as to where one is going can preclude, by early decisions and without greater attention to goals, where the organization ultimately could have gone more effectively. Purchasing property for an elementary school only to find out later that it is a middle or secondary school that will be needed is a classic situation and an example of inappropriate planning. The property size for most elementary schools is generally small and would be inappropriate, even illegal, for the typical high school.

Incremental Planning

The primary author associated with *incremental planning* was Charles Lindblom (1959) who thought of it as "the science of muddling through." This model reduces the amount of information and decision-making required. Basically, it accepts the status quo as the baseline and calls for small (incremental) advances in the direction of organizational goals. Initially this was known as the model of Successive Limited Comparisons. In this formulation, the planner builds on past and current achievements and designs plans that, when implemented, will proceed in small incremental steps. This is viewed as the art of the possible. Organizational goals are seen as flexible, changing, and achievable only, if at all, by small sequential steps taken in the direction of solutions to such goals. The planner may just consider past policies and plans and make marginal changes for a future course of action.

Incremental planning is most commonly used in education to plan annual budgets. This model is used rather than developing a zero-base budget, where the organization essentially begins "from scratch" each year. Much of an educational budget can be assumed to vary only minimally from year to year. For example, usage of electricity can generally be assumed to be roughly the same from last year unless new facilities are added, so budgeting for this is as easy as simply augmenting last year's costs by the anticipated inflation rate. The same approach is used to determine health insurance contributions, fuel for the buildings and vehicles, general supplies, and salaries. This greatly simplifies the financial aspects of planning and the operations engaged in under the plan.

Developmental or Goal-Free Planning

David Clark (1981) referred to this model as goal-free, and this term can be deceptive to school leaders not well versed in planning. Organizations that employ goal-free planning have goals; they are just less specific and can be articulated further along in the planning process as a means of reducing conflict, thereby generating greater stakeholder involvement than in those organizations using more rational forms of planning.

The model is in reality a process that focuses less on the early identification of highly specific, quantifiable organizational goals and the unified action required to attain those goals and more on the identification of shared positive values, beliefs, and organizational visions. The model emphasizes the promotion of a variety of individual and group efforts that are in touch with those shared values, beliefs, and visions. When working from a goal-free model, the planner perceives goals as only one element, and a flexible element at that, in the mix of organizational change concerns. To this extent, the process is non-rational in the sense that organizational change is not seen as exclusively achieved through primary goal attainment. In a comprehensive or bounded rational model, stakeholders may disagree over goals when some individuals would be disadvantaged by the impact of these goals. This may give rise to resistance, either openly expressed or privately held, by a subset of stakeholders. Rather, the goal-free model suggests that by delaying goal formulation or articulation, more time is available to resolve tensions and potential goal conflicts by their adjustment following stakeholder input. Goals that prevent or are inhibiting can evolve during planning and implementation and may sometimes be necessary, but they are not desirable, especially in education. For example, a highly specific school-wide goal to improve reading scores by 100% may threaten budgets; time with students; or even the existence of elementary school physical education, art, and music programs. This conceivably will cause some resistance from teachers and even parents. Under a goal-free planning model, the future directions envisioned would tend to be broader, such as "students should be more actively engaged with literacy activities." In

this case, physical education teachers might contribute to moving in that direction with student work assignments related to the rules and histories of the various sports being taught. Art teachers might assign students a task to create biographical sketches of artists or solicit written critiques of artworks examined. Music teachers might do similar activities related to various forms of the music being studied. Resistance to a specific goal thereby might be reduced without prejudice to impacted students. Each stakeholder's unique contribution to the literacy vision could be planned, implemented, examined, supervised, and evaluated on an individualized basis.

Scenario Planning

Woody Wade (2012) viewed planning as a means of helping to prepare for an uncertain, ambiguous future that certainly will bring new realities. We see this form of planning more in terms of a futures model where the planner is exploring several possible simultaneous results and how they can be dealt with. Scenarios are flexible and identify alternative possible future conditions. Typically, several scenarios may be explored at one time. The underlying premise of scenario planning is that there are multiple key factors that interact in complex ways to influence the future.

Scenario models begin with the identification of key questions to be answered and a time frame established for the plan. Major stakeholders would then brainstorm and debate on the key uncertainties and the variables to be considered, perhaps using a tool such as a Delphi Process. This is a multiple three-round questionnaire process. Each round works to improve consensus by letting everyone see what the anonymous summary of previous rounds indicate; then each individual reconstructs their responses for the next round. The process tends to narrow variability, thereby creating greater consensus. When a holdout's responses do not change and continue to differ from the group, unknown information may be revealed when the holdout is queried and responds, such as "The property for the new school will be right next to the prison being constructed."

Choices are then narrowed to a few scenarios, perhaps two. These should be relevant, challenging, and complementary but generally not polar opposites. Angela Wilkinson and Roland Kupers (1923) wrote, "Tell stories that are memorable yet dispensable." These are alternative possibilities of a future, not a prediction. Obviously, scenario planning would need to be combined with other, more operational, models of planning.

The most appropriate use of this model, at least in education, probably is as a subset of the pre-planning and readiness components in Figure 1. When used early in the overall process, it may provide an opportunity to create positive working relationships and better familiarity with the tasks to be undertaken at a time when nothing has been set in concrete.

When designing scenarios, it is important to remain mindful about best practices, for they should underlie all school improvement efforts. David Hopkins, Alma Harris, Louise Stoll, and Tony Mackay (2011) stated that although innovation can contribute to the continual improvement of student learning, ensuring that research-based best practices are consistently followed is the real key. Among these practices, they featured moving from prescription to professionalism and balancing top-down and bottom-up change.

Experience-based Planning

A most recent planning model by Kristian Hammond (1990) is known as *case-based* planning, which some prefer to call *experience-based* planning. Although the model was originally developed and used for planning artificial intelligence systems, its principles apply well to educational planning. James March and Herbert Simon (1959) gave early recognition to the role of

memory in planning, noting that what is stored in memory can be recalled when similar problems are being addressed. This can be done without substantial new inquiry.

The basic premise of this approach is that past experiences, augmented by reflective analysis of situations, successes, and failures, can be recalled to address current planning situations. What occurred in the past is at least a novice plan. This facilitates, to some degree, the anticipation and avoidance of current and future plan failures. Hammond presented a sequential six-process model for this approach. The first process is *problem anticipation*, in which the current situation is critically examined to detect features that relate to any past planning problems. The next process is *plan retrieval*, during which the planner searches mental and recorded memory (history) for a previous plan or plans that come close to satisfying current goals, while avoiding predicted negative problems. While the term memory is used here, keep in mind that for most planning addressed in this work, the term really references some form of recorded memory. This "memory" can be held in books, reports, recordings, etc. As noted, memory of activities undertaken in the past is, by the very fact of its occurrence, intrinsically usable as a recursive plan. The *plan modification* process follows, during which the previous experiential plan(s) is altered to address any current goals and problems not already addressed. The *plan repair* process calls for the planner to fix a faulty plan by developing a causal explanation for its failures and by establishing strategies for modifying the plan accordingly. In the *credit assignment* process, the planner uses this causal explanation to reflect upon the organizational and environmental conditions that may have led to plan success or failure, so that these may be used as predictors of similar future situations. In the final process, *plan storage,* the plan and causal explanations are placed into the organization's repertoire of planning processes for future reference.

This model suits both individuals and schools well because it builds upon their prior experiences, which make changes far less daunting. For example, planning a wedding can be intimidating, but if you have already planned one or helped a friend plan one, much can be extracted from that experience, and modified as necessary, to make the planning of the second wedding far easier. The same applies to schools. While implementing "new math" can be a massive change, if the school has recently implemented other substantive curricular changes, e.g., hands-on science or integrated language arts, many of their successes can be mimicked.

Unconsciously, this model is often the choice for individuals and schools. If a teacher is faced with a particular student behavior problem, one can fall back on memories of other students with similar behaviors and construct a plan based on what worked best with those students. Large school districts periodically build new schools (or close existing ones), both of which are highly complex endeavors. Rather than approaching this through highly complex, rational planning processes, past memories and past plans of what was successful and what was not (and why not) can greatly facilitate the planning process. This approach is at the heart of scenario planning.

A REALITY WHEN PLANNING: UNKNOWN FUTURES

Planning is, as Dan Inbar (2011) noted, a process of constructing maps to futures. This is done as a way of charting different futures, perhaps better and improved, from those which otherwise would be coming. We look into the future we believe is coming and plan to bring about changes that are more desirable than where we are now and where we expect to be. Our plans anticipate that future, twist and turn that future by ongoing forward-looking activity, until our plans (our maps) look more favorable. Initially the plan is only in the planner's mind or on some media. Unless planning is taking place as changes are made, nothing has been implemented. Implementation to a

large extent flows from the fourth step in the process illustrated in Figure 1. This is the point when the process begins to merge with the future. The merging references the future that the plans have anticipated, at least for a while. But the plan and the reality are not the same thing. The future that emerges will be a blend of the plans and of a fluid future, and the result may or may not yield the anticipated future.

Throughout this work the processes discussed relate to planning and changing the future. But, can this truly be done? What exactly is it that can be changed about any future? Can we really discern what a changed future would be? The illustration in Figure 4 suggests that when the future is entered into, or begins to engulf us, it fuses with the present and what is coming is basically unknown, blending and becoming obscure. Perhaps it will just seem to fade into something different. This future place may be a derivative of happenings in the present.
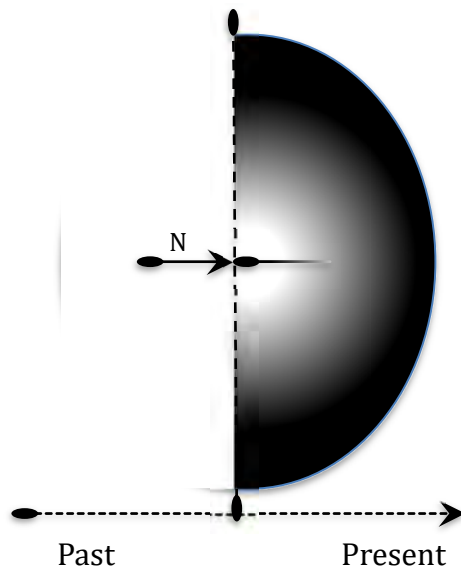
Figure 4: Moving deeper into a future of expanding uncertainty**.**
Graphic design developed in 2020 by author.

And this place, as noted, can cast shadows backward into our present, raising concerns with the details of what may be coming. A shadow such as, "How will this change impact my raise next year? What is coming may or may not be in my best interest." Or possibly it is an even brighter future that is out there. So, realizing this we may seek the means to bring about change to obtain this better future. This is really what planning and its designed changes are all about. When we plan we attempt a design that may allow us to bring forward this better future. By implementing our plans, change begins. Perhaps our desired future, the one that is hopefully better suited to the individual and the organization's interests can be achieved. A new future arises from the many possible and from the one that otherwise would be coming.

Not all possible futures bring improvements. Keep in mind that when you reach into the future to shift what might be coming, you may find evidence of other hands already active, bringing about not your future, but theirs. The future does not deny access to others, and their hands can be reaching into the same future (your future). Only, their efforts will be directed at improving their

versions of the future. A future that may be antithetical to what you hope for. Conflict can arise as the alternate futures compete equivalently with our plans and even surpass our efforts.

And the further out, that is the deeper out in time, the more uncertain the future will be, and therefore the less appropriate our corresponding plans are likely to be. Can we really know such futures and prepare for them? And that uncertainty is not uniform. Some of the expected changes can occur at different rates and with different shifts in boundaries. When implementing plans, you are attempting a landing in the fog.

Also, the sustainability of the change we make is not a given. Change seems to create change. What can we draw from all this? Three things present themselves, 1) change itself is a destroyer of change, 2) change is an emerging derivative from the detritus of past change, and 3) change is universal; it is the very milieu of planning's existence. Finally, at the level of speculation these can be planned for; at a specific level, effects and impacts of change are generally unknowable. Perhaps a new word is required; such events are *unexplanable*.

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FIFTY YEARS OF EDUCATIONAL PLANNING: WHAT DO WE HAVE TO SHOW FOR IT? WHAT MIGHT WE DO NEXT?

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ABSTRACT

The hard work and the money spent by and for education in the last 50 years does not, it seems, to allow us to deliver required and ethical value for the money. We are charged with assisting all learners to be productive citizens of tomorrow, but, loaded down with non-core curriculum and social requirements, the educational ship is creaking and falling short. This article reviews how we are doing in delivering value and suggests two types of leadership and planning for us to transform ourselves: Outside-in and Inside-out leadership in planning. Both are useful and combined they can be a powerful force in delivering true value.

INTRODUCTION

Education either adds measurable value to our shared society or it subtracts it. If it adds value, our world gets continually better. If it doesn't, it subtracts value on many dimensions. Education and educators agree that we want to add value. We have burdened it with many non-core things that exhaust us and divert us from our core mission of adding value to our society, and doing it safely. Do we now add responsive measurable value? If not, what might we do and accomplish?

It is possible to make education so it will add value to all stakeholders. Let's go from what is overloading education today and how another perspective on planning could reform education and realy help learners be successful in school, successful in life and help develop our world to be a really safe and add value to all.

GOOD INTENTIONS

Here is a partial list of likely well-intentioned changes in the last 50 years, either mandated or enlisted. Have they been effective, just putting more demands on education with little, no or negative return on investment?

- Desegregation
- Mainstreaming
- Affirmative action
- Busing
- Block scheduling
- Ban of prayer
- Accountability
- Tenure
- Teacher testing
- High stakes testing
- High standards
- Cultural literacy
- Bilingual-Bi-Cultural
- Charter Schools

- School choice
- Class size limitations
- Merit-based compensation
- Outcome based education
- No Child Left Behind
- Initial mastery
- Computers/CIA/CMI
- School-to-work
- Common core
- Distance learning
- Political correctness
- Women's studies
- Black Studies
- Latino/LatinX Studies
- Gender neutral bathrooms
- Race to the Top
- ESSA
- STEM
- STEMA
- Social Justice
- Safe spaces
- Project-based learning
- Flipped classrooms

We have caused fatigue by all the things we load up on education to do and deliver. All, somewhere and somehow, included in educational planning and then delivery. Each intended to improve learner and social performance. Perhaps as did your mother, mine repeatedly told me, "The road to hell is paved with good intentions." Did they? When change initiatives fall short, there is a tendency to fix the blame and not fix the problem.

OUR RETURN ON INVESTMENT FROM PLANNED INTENTIONS

How did each and all do? Although US education includes possibly the widest diversity in its learner population (and no declines in performance should be appreciated and dropouts seem to be decreasing), the results and return on investment is, putting it gently, disappointing. Here are some data indicating that we spend abundantly per learner (2nd in the world) and get a poor return (See Figure 1).

Despite our high spending on education, current PISA data (https://data.oecd.org/pisa/reading-performance-pisa.htm#indicator-chart) show that the US is doing a bit better at reading, worse in math, and better in science. We have made limited progress, if one can call it that, over the years for the sizeable investments made. We are still not, it is suggested, getting appropriate return on our substantial investment. We can do better.

According to the annual Phi Delta Kappa Gallup polls on education, people are happy with "their" system but question all others; Interesting but seems to deny actual reality. This emphasizes the reality that all educational partners must be involved in planning. Doing so delivers what Peter Drucker called "transfer of ownership." Not to involve all partners will weaken planning and its effectiveness.

How the U.S. compares on science, math and reading scores

Average scores of 15-year-olds taking the 2015 Program for International Student Assessment

● Score is significantly **higher** than U.S. ● Score is **not** significantly different from U.S. ● Score is significantly **lower** than U.S.

Science

Country	Score
Singapore	556
Japan	538
Estonia	534
Taiwan	532
Finland	531
Macao	529
Canada	528
Vietnam	525
Hong Kong	523
South Korea	516
Slovenia	513
New Zealand	513
Australia	510
Germany	509
Netherlands	509
United Kingdom	509
Switzerland	506
Ireland	503
Denmark	502
Belgium	502
Poland	501
Portugal	501
Norway	498
United States	496
France	495
Austria	495
Sweden	493
Spain	493
Czech Rep.	493
OECD average	493
Latvia	490
Russian Fed.	487
Luxembourg	483
Italy	481
Hungary	477
Croatia	475
Lithuania	475
Iceland	473
Israel	467
Malta	465
Slovakia	461
Kazakhstan	456
Greece	455
Chile	447
Bulgaria	446
Malaysia	443
United Arab Emirates	437
Romania	435
Uruguay	435
Cyprus	433
Argentina	432
Moldova	428
Albania	427
Turkey	425
Trinidad and Tobago	425
Thailand	421
Costa Rica	420
Qatar	418
Mexico	416
Colombia	416
Montenegro	411
Georgia	411
Jordan	409
Indonesia	403
Brazil	401
Peru	397
Lebanon	386
Tunisia	386
Macedonia	384
Kosovo	378
Algeria	376
Dominican Rep.	332

Mathematics

Country	Score
Singapore	564
Hong Kong	548
Macao	544
Taiwan	542
Japan	532
South Korea	524
Switzerland	521
Estonia	520
Canada	516
Netherlands	512
Finland	511
Denmark	511
Slovenia	510
Belgium	507
Germany	506
Ireland	504
Poland	504
Norway	502
Austria	497
New Zealand	495
Vietnam	495
Australia	494
Sweden	494
Russian Fed.	494
France	493
United Kingdom	492
Portugal	492
Czech Rep.	492
Italy	490
OECD average	490
Iceland	488
Spain	486
Luxembourg	486
Latvia	482
Malta	479
Lithuania	478
Hungary	477
Slovakia	475
United States	470
Israel	470
Croatia	464
Kazakhstan	460
Greece	454
Malaysia	446
Romania	444
Bulgaria	441
Cyprus	437
United Arab Emirates	427
Chile	423
Turkey	420
Moldova	420
Uruguay	418
Montenegro	418
Trinidad and Tobago	417
Thailand	415
Albania	413
Argentina	409
Mexico	408
Georgia	404
Qatar	402
Costa Rica	400
Lebanon	396
Colombia	390
Peru	387
Indonesia	386
Jordan	380
Brazil	377
Macedonia	371
Tunisia	367
Kosovo	362
Algeria	360
Dominican Rep.	328

Reading

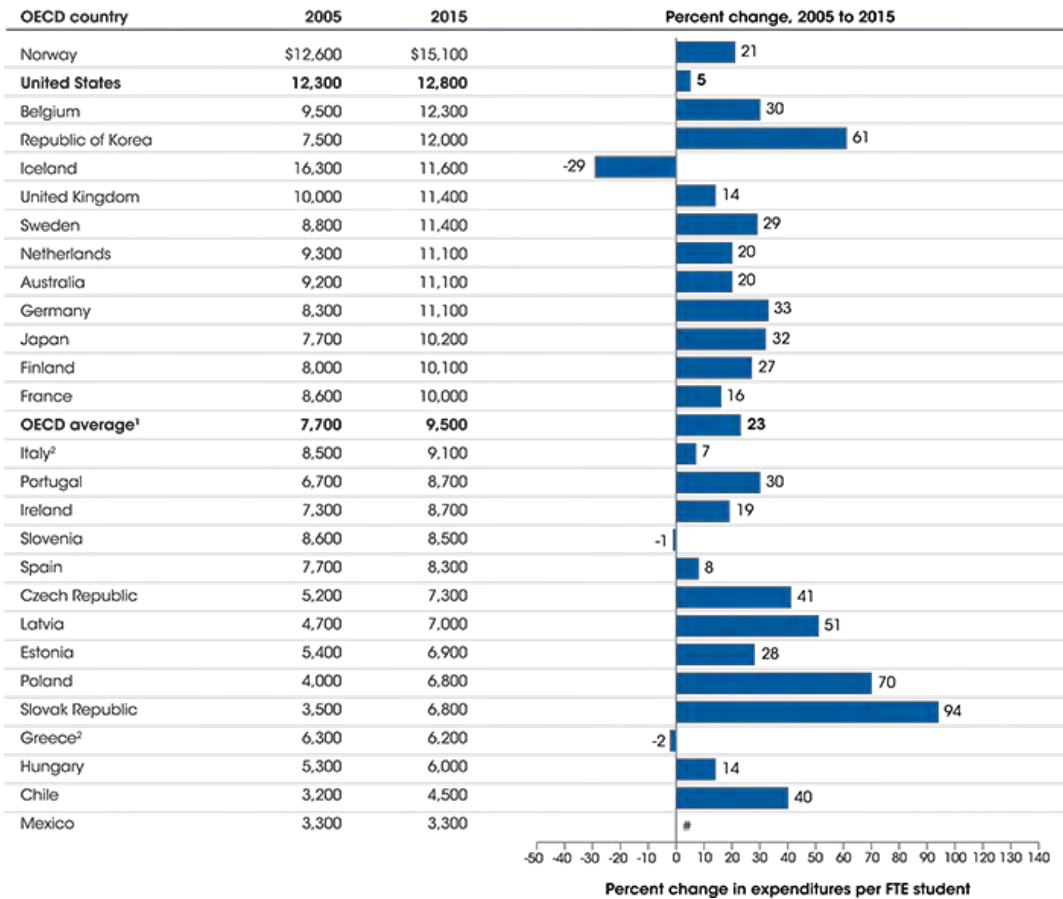| Country	Score
Singapore	535
Hong Kong	527
Canada	527
Finland	526
Ireland	521
Estonia	519
South Korea	517
Japan	516
Norway	513
Macao	509
Germany	509
New Zealand	509
Poland	506
Slovenia	505
Netherlands	503
Australia	503
Denmark	500
Sweden	500
Belgium	499
France	499
United Kingdom	498
Portugal	498
Taiwan	497
United States	497
Spain	496
Russian Federation	495
OECD average	493
Switzerland	492
Latvia	488
Vietnam	487
Czech Rep.	487
Croatia	487
Austria	485
Italy	485
Iceland	482
Luxembourg	481
Israel	479
Lithuania	472
Hungary	470
Greece	467
Chile	459
Slovakia	453
Malta	447
Cyprus	443
Uruguay	437
Romania	434
United Arab Emirates	434
Bulgaria	432
Malaysia	431
Turkey	428
Kazakhstan	427
Trinidad and Tobago	427
Montenegro	427
Costa Rica	427
Argentina	425
Colombia	425
Mexico	423
Moldova	416
Thailand	409
Jordan	408
Brazil	407
Albania	405
Qatar	402
Georgia	401
Peru	398
Indonesia	397
Tunisia	361
Dominican Republic	358
Macedonia	352
Algeria	350
Lebanon	347
Kosovo	347

Note: Scale ranges from 0-1,000. Results from China not included because only four provinces participated in PISA 2015.
Source: OECD, PISA 2015

PEW RESEARCH CENTER

Information available at https://www.pewresearch.org/fact-tank/2017/02/15/u-s-students-internationally-math-science/

[In constant 2017 U.S. dollars]

OECD country	2005	2015	Percent change, 2005 to 2015
Norway	$12,600	$15,100	21
United States	**12,300**	**12,800**	5
Belgium	9,500	12,300	30
Republic of Korea	7,500	12,000	61
Iceland	16,300	11,600	-29
United Kingdom	10,000	11,400	14
Sweden	8,800	11,400	29
Netherlands	9,300	11,100	20
Australia	9,200	11,100	20
Germany	8,300	11,100	33
Japan	7,700	10,200	32
Finland	8,000	10,100	27
France	8,600	10,000	16
OECD average[1]	**7,700**	**9,500**	23
Italy[2]	8,500	9,100	7
Portugal	6,700	8,700	30
Ireland	7,300	8,700	19
Slovenia	8,600	8,500	-1
Spain	7,700	8,300	8
Czech Republic	5,200	7,300	41
Latvia	4,700	7,000	51
Estonia	5,400	6,900	28
Poland	4,000	6,800	70
Slovak Republic	3,500	6,800	94
Greece[2]	6,300	6,200	-2
Hungary	5,300	6,000	14
Chile	3,200	4,500	40
Mexico	3,300	3,300	#

-50 -40 -30 -20 -10 0 10 20 30 40 50 60 70 80 90 100 120 130 140

Percent change in expenditures per FTE student

Information available at https://nces.ed.gov/programs/coe/indicator_cmd.asp

Figure 1. Examples of US education performance and investments

HOW DOES THIS CURRENT EDUCATIONAL REALITY HAPPEN?

I suggest that we have hit our limits of what can be done to improve the current educational system. It is old, creaky, and not in any condition to improve if we simply want to enhance what now exists. Adding more and more well-meaning approaches and study topic would be suspect.

It is as if we had a wonderfully functional educational wooden sailing ship and we keep trying to improve it by retrofitting it. We put braces on the timbers, made the sails stronger and more durable, changed the crew to multi-lingual, assigned them to different posts, trained them more, increased supervision, added GPS…. And, still, the old wooden hull did not meet the requirements of today's seafaring realities. We kept adding, changing…. And like education, here we are with a vessel that once was good enough, but not now robust enough to serve us well.

Our approach to planning and delivering education has hit its limit, as suggested by Branson (1988). We know many validated things that do not often get applied in human learning

and delivery, and we also know a lot about motivation. Do we apply evidence-based concepts and tools? Do we change how we deliver education, and is it uniformly effective to our diverse learner population? Are relevant competencies provided by colleges of teacher education? These, and many other questions about the status quo exist.

VITALLY, DO WE KNOW WHY WE TEACH WHAT WE TEACH?

We keep trying to do the same things, only cheaper, faster, better. But our old ship of education is creaking, and we, at the same time, are not sure of to where we are sailing and why. Do we stay with the original ship, or do we change the platform to serve new realities? Do we define where the ship should head and know how to track its progress and arrival?

Schumpeter (1937) suggests the concept of "creative destruction," where, in order to move ahead, things of the past must be demolished; get out of the way to be replaced or stopped. Perhaps this notion must be applied to transform--not just improve or change--all or part of our current educational enterprise (c.f. Bernardez (2009). In addition, Kuhn (1970) informs us that simply peer acceptance of concepts or ideas may lead to inhibiting useful change. Popular is not always the same as useful. If we want to transform, as well as improve the measurable value added of education, the implications of two approaches and their viability are worth considering (Kaufman, 2020).

TWO APPROACHES TO EDUCATIONAL LEADERSHIP AND PLANNING

There are at least two types of leaders and related planners (labels I will now use interchangeably). The traditional leaders and planners (and there are several variations of them), that get others to do things with the same purposes cheaper fast, and better. They build on the here-and-now and work diligently to bring it to new heights of success. They view education and educating from within their organizations and then extend out, hopefully, to shareholders—citizens, communities, and our shared societies—to attempt to deliver value. They are *Inside-out* leaders and planners.

Then, there are the *Outside-in* (or inversion*) planners* –who stand things on their heads, who create something new and labor to bring it to the point conventional leaders can take the new orientation onto the next steps by using Inside-out planning. Outside-in leaders ask questions such as: "If my organization is the solution, what's the problem?" and "If this organization didn't exist, would you re-create it? Just the way it is now." Outside-in planners look at things from outside an organization—with societal good as the primary focus—and then move inside. The two approaches to educational planning and thinking, Inside-out versus Outside-in thinking, leadership and planning are shown in Figure 2.
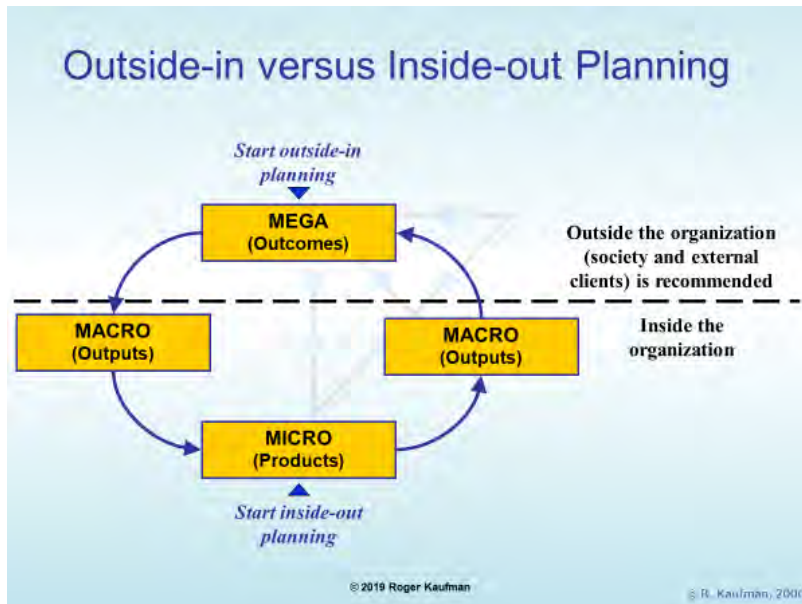
Figure 2. Outside-in and Inside-out planning and leadership (Kaufman, 2006, 2011, 2020)

Both the Outside-in and Inside-out planner best uses the three levels of results (Kaufman, 2000, 2006, 2011) of:

MEGA – Primary client and beneficiary is society and the world we choose to create for tomorrow's child

MACRO – Primary client and beneficiary is the organization itself

MICRO – Primary client and beneficiary are individuals and small groups.

There are, in addition to these three, two more *Organizational Elements* (Kaufman, 2006, 2011), that include Mega, Macro, and Micro, that are not results but essential enablers of results, which together form everything and organization, uses, does, produces, delivers and its external value added:

PROCESS – programs, projects, activities, methods, and procedures intended to deliver results.

INPUTS – the ingredients that may be used, including human, physical, and capital resources.

These five levels – the Organizational Elements – for best practice, should be linked and aligned. They also form a hierarchy of planning (Kaufman, 2018).

The Inside-out planner attempts to get from internal practices and results to measurable Mega/Societal contributions. The Outside-in planner starts with Mega/Societal value added and builds the educational enterprise from there…sometimes using current practices while replacing and creating others.

Figure 3 shows Outside-in and Inside-out orientations. It includes the entire Organizational Elements Model (Kaufman, 2000, 2006, 2011), Figure 4 also describes a planning hierarchy (Kaufman, 2018).
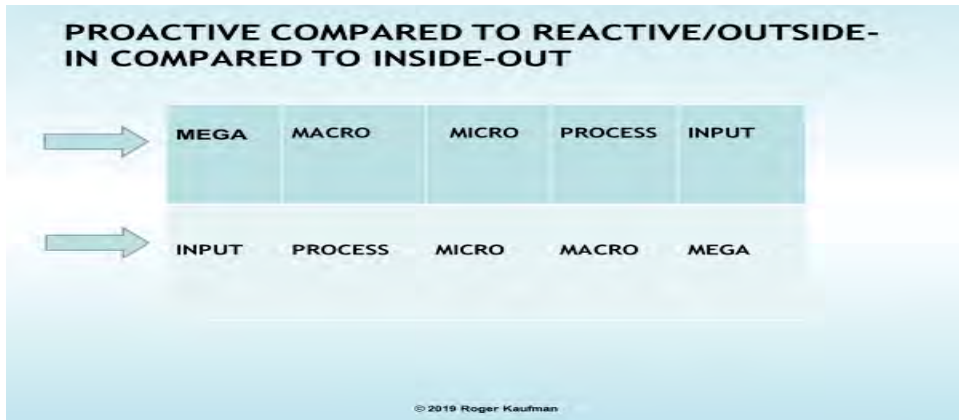
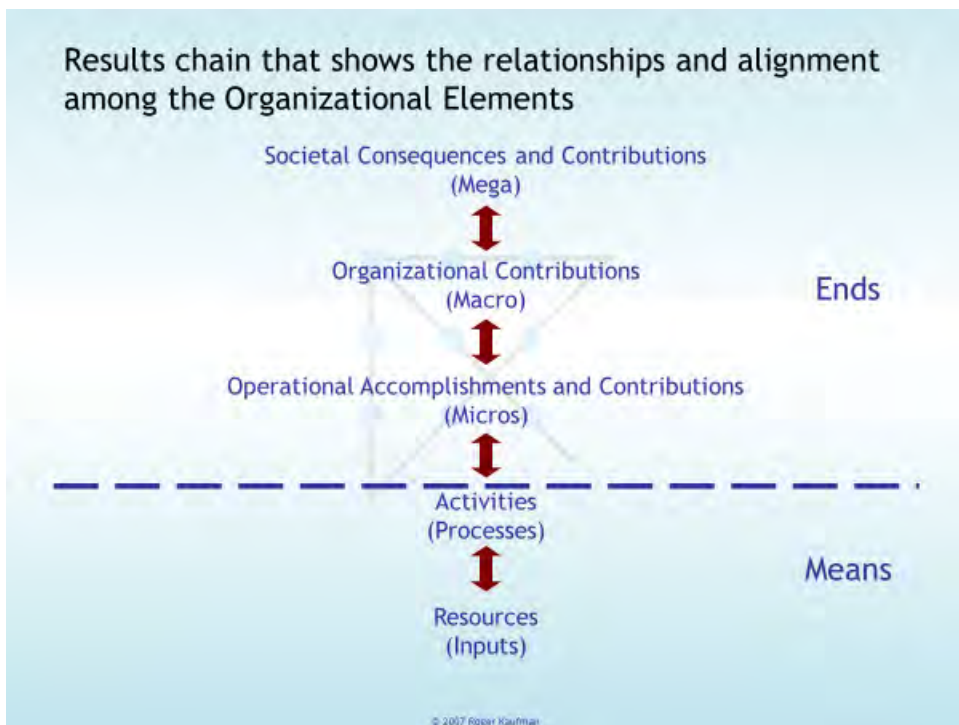**Figure 3. Outside-in and Inside-out approaches.**

Figure 4. A results chain and hierarchy of planning including the Organization Elements of Mega (Societal Contributions) ¦ Macro (Organizational Contributions) ¦ Micro (Individual Contributions) ¦ Processes methods, programs, activities) ¦ Inputs (physical, human, and financial resources. (Kaufman, 2018; Kaufman, 2019 May).

A complete definition, including contributing variables, is in Kaufman (2011) as an Ideal Vision. It defines the kind of world we want to create for tomorrow's child. Moore (2010) suggests

doing so is an ethical responsibility. If you are not adding measurable value to our shared society, what else are you doing and delivering?

WE MUST HAVE BOTH TYPES OF LEADERS AND PLANNERS

Our world is rich with people who decided not to keep doing what everyone else is doing, instead moving to a perspective outside of the conventional reality. They realized the once wonderful wooden educational sailing ship was not performing in the current realities.

Our society is abundant with examples of people who realized the current modes of operation were failing. Women, facing a world where men were physically stronger, shifted not to weightlifting but to developing intellectual strength. Medical science is developing increasingly better ways to treat dread diseases such as cancer, pandemics, and Alzheimer's, while others are finding ways to eliminate them in the first place. We must have both competent women and men as we still must have planners who treat disease and those who eliminate it: Outside-in and Inside-out. So, it is for poverty. There are leaders who help the poor and unlucky to cope, and those that show ways out of hopelessness. Conventional leaders and Outside-in leaders.

WHAT MIGHT WE DO TO OPTIMIZE BOTH KINDS OF LEADERS AND PLANNING?

We could get education to transition back from teaching people what to think to teaching people how to think. We can reward leaders who leave our shared world a better place intellectually and socially. We can identify community vital signs (Kaufman, 2019, Aug.) to determine the skills, knowledges and attitudes learners must have in today's and tomorrow's world and use that to design curriculum, learning aids, and define teacher competencies.

With an Outside-in approach, organizational structure, staffing, curriculum and curriculum design, delivery, and evaluation (c.f. Bernardez, M., & Kaufman, R. (May-June 2013; Bernardez, M., R., Krivatsy, A., Arias, C. & Kaufman. (2012), would likely transform an organization. Examples exist, such as its application at the Sonora Institute of Technology (Guerra & Rodriguez, 2005). There are many other instances of organizations starting with Mega/Outside-in: Bernardez (2009) and his team, charged by the President of Panama and their Minister of Tourism, to transform the very troubled City of Colon. Another community example was to save an Argentina petroleum transmission company, including the community which managed and implemented it and the troubled city in which they lived (Bernardez, 2004). Outside-in planning is being used successfully to transform a slum in Buenos Aires (Bernardez, 2020). Outside-in/ Mega planning was used in the creation of a new Australian University (Watts, 1989).

ONE CAVEAT IN USING OUTSIDE-IN PLANNING

The Inside-out planners often want to take over the operation before the Outside-in planning has been accomplished. Because it is the conventional and accepted approach, Inside-in planners and implementers feel comfortable with it. They have a tendency not to change modes and continue with the institutional wisdom. The pressure "to go back" is often high. Even when that happens, the impact of a Mega focus usually remains. To be sure, Inside-out planning will and should be used once the Outside-in planning is completed.

With Outside-in planning, our delivery model would not be as much patterned after ancient university emphases on subjects alone but would blend them with other knowledge areas so learner can and will think integratively and hopefully creatively.

Research (Hinchliffe, 1995) suggests that working from inside-out might limit our effectiveness. In his work, he found that starting with the more comfortable Inputs, then Processes, and then Products (using the Organizational Elements Model in Figure 3) tended to inhibit planners to go further to the other results (Macro and Mega, Figure 3), However, he found that starting matched people outside-in, they were more comfortable moving from Mega and then inside to all the elements of delivering worthy performance. But that does not mean everything we use now should be discarded.

BUILD ON WHAT IS WORKING

Throw out subject knowledge? No. Build on subjects and integrate them. Replace teachers? No. Re-place teachers as learning managers and mentors. We can use what is in place to create new learning environments based on contemporary validated on how people learn and perform.

We can do Inside-out leadership and planning and change platforms—from wooden ones to metal to…—and develop what currently could contribute to useful measurable results. We keep doing that with seeming diminishing return on investment. Therefore, Inside-out planning is best done after Outside-in has been accomplished in order to assure our educational systems are adding value to our shared society…to Mega.

During the Outside-in planning, creative destruction might be recommended and implemented. We can change our view on what education is and could deliver from a content area focus to an integrating and application focus. We could start viewing education as integrating k-12 and higher education as well as other social agencies, such as housing and urban development, health and human services, law enforcement, labor…all of which realize they are part of serving the same clients. This a holistic view. (c.f. Kaufman, 1992; Kaufman. Corrigan, & Johnson, (1969), Kaufman, Herman, & Watters, (1996). Kaufman. & Herman. (1996), Kaufman, Watkins, & Leigh, (2001), Kaufman, Guerra, & Platt. (2006), Reville, (2020).

While we are managing our educational operations, we can do Outside-in leadership and planning and perhaps discover and develop new missions, structures, platforms, new methods of delivery, new methods of evaluation (c.f., feedback, and reform. We might think of not just change, but transformation (Drucker, 1994), where a new educational reality might emerge.

I am just touching on possible options for educational planning and transformation. Any current approach can be seen as the conventional Inside-out. I would argue that an Outside-in approach—not to be confused with "backwards planning" the starts with clarifying current goals and objectives--be used in education to remove the exhaustion of doing the same thing over and over (with little to dismal result). This approach, with a focus on the societal good, could help design a new educational ship that meets the realities of today and tomorrow.

That leaves one to wonder; will we shift to become both conventional Inside-out planners and Outside-in leaders and planners? Or will we keep getting better at doing that which should not be done at all? Or will we also think outside the box, and add measurable intellectual and social value? Outside-in leaders and planners can help us become the only ones who do what we do. We can create new realities. Will we commit to add measurable value to our communities and society? Our individual and collective futures depend on our choices.

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PLANNING FOR HIGHER EDUCATION INSTITUTIONS: CHAOS AND THE COVID-19 PANDEMIC

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ABSTRACT

Albert Einstein once remarked that the world was characterized by a proliferation of means and a confusion of goals. This certainly characterizes the state of global higher education today. The age of technology and the information society are sweeping educators towards a future dependent upon knowing how more than knowing what. Throughout the world, college and university administrators are attempting to determine global scope coupled with the impact of technology. To many educators higher education is now a place of innovation and change, while to others it is a morass of change and fear. However, the COVID-19 pandemic created change and fear gripped higher education and forced change that was totally unexpected. What are the lessons to be learned from this forced change?

No man ever planned to fail – What probably happened was, he failed to plan.
– Will Rogers

INTRODUCTION

The modern world is changing quickly in many unanticipated ways. Stability has given way to uncertainty, panic, and chaos in the contemporary world (Bosire, 2017). In the current environment strategic higher education leaders look for ways to manage in an imbalanced world where the focus is on leading for survival, where the current and future are unpredictable, capacity is uncertain and unknown, and learning is an issue of social and economic security (Beerkens, 2018). Such a time calls for unprecedented response to an unseen enemy with the capacity to render higher education useless. To combat such an enemy, planning is an obvious necessity which demands that leaders plan for an undetermined outcome (Marginson, 2020). How did higher education arrive at such a condition (Yan, 2020)?

The outbreak of COVID-19 has forced changes due to an environment of uncertainty, chaos, and fear as the infectious virus spread throughout the world (Bhumenstyk, 2020). The COVID-19 virus has had an unprecedented impact. As the COVID-19 virus spread from other countries and infections increased, China closed higher education institutions to limit its spread; however, COVID-19 continued to move from one country to another causing a worldwide health emergency (Bozhurt & Sharma, 2020; Zizek). Higher education institutions worldwide were forced to close, disrupting a $600 billion world-wide industry (Hechinger & Lorin, 2020).

NEED FOR PLANNING

Higher education institutions have two basic choices in preparing for, managing and mitigating crises. They can try to anticipate and avert them, and/or become resilient (Lemoine, Hackett, & Richardson, 2016). It is desirable, of course, to anticipate and avert crises whenever

possible, but anticipation can be effective only in situations where (1) the probability of the worst risks to be faced are known, and (2) knowledge can be used to avoid or mitigate negative outcomes (O'Regan & Ghobadian, 2007).

Although leaders in academe have a crucial role in the response of their institution to crises, in reality, the role of campus leaders in establishing a culture of trust, collaboration, and shared leadership prior to a crisis will more significantly influence the ability of the institution to withstand times of crisis (Gigliotti & Fortunato, 2017). Faced with the uncertainty and growing intensity of the novel coronavirus pandemic, academic leaders in colleges and universities in the United States and around the world made the strategic decision to transition to online teaching (Duari & Sarkar, 2019; Heitz, Laboissiere, Sanghvi, & Sarakatsannis, 2020).

The forced change to remote learning was stressful as neither faculty nor students were prepared for the rapid change to online teaching since many academic institutions lacked the faculty with experience in online teaching (Tereseviciene, Trepule, Dauksiene, Tamoliune, Costa, 2020). The transition to remote online delivery required radical changes in attitude, values, and beliefs for many faculty, students and administrators (Zubascu, 2020). It also required process and procedure enhancements, new strategies, and even new ways of doing business for most institutions (Reimers & Schleicher, 2020). The decision by leaders to transition to online education was made swiftly, prompted by the need to comply with government mandates to close (Basilaia, Dgebuadze, Kantaria, & Chokhonelidze, 2020). A rapid response from leadership was essential for effective crisis management, and the transition to online learning sent a clear message to all stakeholders that leadership understood the coronavirus represented a significant problem, they were taking the health threat seriously, and were taking steps to address it (Cowen, 2020).

Most institutions have information in their strategic plan to address crisis (Kotler & Murphy, 1981). However, most of those plans include short-term issues and catastrophes that are weather-related or associated with social unrest, typically local not international. Few institutions had plans for a pandemic that could last for years, not just months. In fact, there are few plans to address a massive world-wide event that encompasses most of higher education throughout the world (Karalis, 2020). Once the Chinese closed their higher education institutions, closing higher education institutions became almost the only model. Were there plans to do this (Shah, 2013)? Probably not. So, what should be done? Plan for the unknown (Mallon, 2019).

WHAT IS PLANNING?

The purpose of planning in higher education is to enhance institutional effectiveness and improve management capability (Taylor & de Lourdes Machado, 2006). The planning process can help an institution cope with an uncertain future (Waller, Lemoine, Mense & Richardson, 2019). Planning's dual purpose is to connect an institution to its environment and to provide unity and direction. Planning requires that an institution become active rather than passive. Planning is a resource and potential supplier of competitive advantage that portends a dramatic shift away from the assumption of a "one size-fits-all" model (Pucciarelli & Kaplan, 2016).

Planning processes should be adapted to the specific conditions facing the institution (Seymour, 2011). Each institution must assess its own environment and make the best decisions possible (Albrechts & Balducci, 2013). Planning is a rational and systematic process that requires higher education leaders and stakeholders to determine where the institution is headed, why the institutions should go there, and directions for getting there, including an evaluation plan (Akinyele & Fasogbon, 2010).

Planning is critical because higher education institutions function as the sum of independent parts that work together to achieve a common purpose (Batra, Kaushik, & Kalia, 2010). However, the plan must remain flexible as higher education and the world are not stable, are sometimes chaotic, creating the need for revision and adaption of plans to meet evolving issues (Bynander & Nohrstedt, 2020). Plans should not be written in stone because they need to be updated and revised as the need arises (Bruckmann & Carvalho, 2018).

Higher education planning entails both formulation and implementation of strategy. Through planning, higher education institutions determine their major goals and objectives and then develop policies and procedures geared to meet objectives (Jalal & Murray, 2019). Changes in the higher education landscape due to external influences have triggered a realization that institutions need to use planning techniques to shape and re-think strategy in order to survive, and become more flexible, creative, innovative, and inventive (Wanaswa, Awino, & Ofutu, 2017).

Another aspect of planning is the need to identify ends before means. Where to go should guide the means for getting there (Snyder, 2015). If a goal or end is imperative for the institution, decisions must be made about the allocation of resources to get there (Mensah, 2020). Resources include time, money, people, facilities, and technology (Haines, 2016). In contrast, ends are results, consequences, and payoffs that the institution produces. Without a plan the institution will miss defining and justifying *where* it is headed before defining *how* to get there (Albrechts, Balducci, & Hillier, 2016).

Planning provides the structure needed to identify and focus on problems, issues and concerns for the institution (Moran, 2020). Planning helps organize and engage personnel in the pursuit of common goals. Planning increases communication so all parties understand their responsibilities (Mueller, 2015).

Planning should focus on the top priority: students' educational achievement. The greatest responsibility is to provide students with the knowledge, skills, learning experiences, and support so they may be prepared to survive and thrive in a world full of uncertainty, changes, and challenges (Albrahim, 2020). Planning permits the institution to set the stage for change: for the institution and most importantly for students (Carver, 2020).

LEADERSHIP IN A CRISIS

Leadership means the ability to anticipate and envision the future, maintain flexibility, think strategically and initiate changes that will create a competitive advantage for the institution. Efforts to envision multiple futures and develop multiple strategies to meet the needs of those futures are presently taking place around the world (Altbach & Reisberg, 2018).

The need to navigate change and adapt is widespread in higher education, which has grown increasingly unstable, unpredictable, and unbalanced in the current time of rapid and sustained change (Lemoine & Richardson, 2019). The challenge of leading during uncertainty involves the courage to take action when the longer-term way ahead is unclear (Young, 2020). The capacity for higher education leaders to handle complexity, engage people in vision, partner effectively and lead through change is a strategic necessity in unprecedented times (Hayes & Wooten, 2010). Paradoxical leadership examines incongruent demands for control and flexibility to analyze their interplay relative to organizational effectiveness, leadership, culture, and decision making (Denison, Hooijberg, & Quinn, 1995; Farson, 1996).

Protecting the physical welfare of students, faculty and staff juxtaposed against the need to

continue education for students is the current paradox (Fernandez & Shaw, 2020a). Most university leaders chose the option first used by the Chinese (Wang, Cheng, Yue, & McAleer, 2020): close the university to protect health and move all learning opportunities online even though the move to remote learning was not planned for by the university or the students (Daniel, 2020).

PLANNING FOR A CRISIS

Was there planning for such an event as COVID-19? Not much – because there was such little time to prepare. Most universities had a plan for a catastrophe in place, but probably not one as extensive and encompassing as needed when presented by a world-wide pandemic. Most universities had plans for local disasters, but not something as far-reaching as COVID-19, which impacted the entire United States and the world (Evans, 2020).

Wynn and Guditus (1984) define planning as a "road map;" while Drucker (1968) stated that planning was a means for obtaining a desired future. Simply stated, planning is a process of deciding what to do and how to do it before some action is required (Said, Ahmad, Mustaffa, & Ghani, 2015). Contingency planning implies that there is no one best way to think about and manage the educational institution. That is not to say that any one way is as good as any other: the concept is that different organizations exist in different conditions and face different problems. Therefore, leaders need to think about those conditions and adapt their planning to them (Poister, Edwards, & Pasha, 2013).

All planning begins as a response to a stimulus. Planning begins with an identification of the problem, and almost always includes a proposed solution to the problem. Planning is a component of strategy; it is an active option to cope with the problem and the future (Schraeder, 2002). Planning has the same essence in all kinds of organizations. It aims to define what to accomplish and how to do so, in order to respond to a dynamic environment. Nonetheless, the formulation of a strategy, based on specific frameworks, differs among institutions (Tromp & Ruben, 2010).

Lewis (1983) specifies three separate and distinct types of planning: (1) problem-solving planning, often called crisis management; (2) operational planning, and (3) strategic planning.

Considerations for higher education leaders in using planning are:

1. Planning is not a single concept, procedure, or tool.
2. Planning emphasizes different aspects of a process.
3. Every process application is a hybrid adapted to the unique situation.
4. Planning processes for specific situations must be developed.

In discussing the need of planning because of the difficulty in predicting the future, Lewis (1983) stated three assumptions that can be made about the future:

1. It will differ from the past.
2. It will be difficult to predict.
3. The rate of change will be faster than ever before. (p. 3-4). How true about the development of the Corona virus pandemic.

Kaufman, Herman & Watters (1996) stated that "planning identifies where to go, it justifies why, and shows how we get there" (p.12). Strategic planning can be a major contributing factor for higher education institutions to achieve their goals and increase their productivity and performance. Therefore, planning should be designed to improve the environment of change and achievement in an era of uncertainty (Bennett & Kinney, 2018).

Planning gives direction and a sense of continuity and stability but does not imply rigidity or the inability to change (Albrechts, 2017). Events are always happening to higher education institutions, so the ability to plan for change is an essential skill because change is always present, but growth from change is optional. Growth occurs when individuals and/or groups cope with tough, intractable problems and overcome them (Allison & Kaye, 2015). Change and uncertainty make "optimum planning strategy" impossible because in the case of COVID-19, there was neither the time nor the information required for making plans once the pandemic arrived (Fernandez & Shaw, 2020b). How can higher education leaders make decisions so quickly about issues too complex to be fully understood, given the fact that actions initiated on the basis of inadequate planning may lead to significant regret?

PLANNING STRATEGY

Strategy has historically been considered as a plan of action and is commonly defined as a plan. Mintzberg (1994), defined strategy as an intended plan, realized pattern, perspective, position, and ploy. Thus, the meaning of strategy in the context of higher education institutions is in the form of plans, actions, and tactics to achieve goals. Strategy is the direction a higher education institution takes over the long-term, enabling it to cope with a changing environment (Grünig, & Kühn, 2015).

Strategic planning is the process of understanding the organization's direction while allocating its resources in the most efficient way (Bryson, 2011). However, strategic planning is neither static or predictive; strategic planning is rather a learning and flexible process that enables organizations to adapt in constantly changing environments (Elbanna, Andrews, & Pollanen, 2016). Strategic planning is one key factor of an organization's performance to enhance its adaptation to both external and internal changes.

Economic Considerations Due to the Pandemic

Higher education is increasingly viewed as a major engine of economic development (Elliot, 2020). Higher education operates in a continually fluid and uncertain environment where government is ultimately responsible for the development of higher education. The most obvious trends are those that support the hypothesis that the better the higher education system, the better the economy and the more productive the country (Avdeeva, Kulik, Kosareva, Zhilkina, & Belogurov, 2017). Both the social and economic future of countries depends heavily on the educational attainment of their population and the quality of their higher education institutions (Brandenburg, de Wit, Jones, & Leask, 2019).

The failure of undergraduate students to complete their studies is a cost to a government body which funds higher education institutions and where government appropriations support students through contributions to institutions in the form of tuition fees and/or maintenance. A government's concern is to keep public spending for higher education as low as possible means that the obvious aspect of its economic agenda is best served by minimizing non-completion and delayed completion, as these facets may be construed as inefficiencies in the use of public finances, and hence they become political issues (Kruss, McGrath, Peterson, & Gastrow, 2015). Therefore, one of the major considerations in the pandemic was to find a way to preserve the funding already received for the current semester by using remote online learning (Michie, 2020; Ozili & Arun, 2020).

Technology as a Key Factor

Technology develops the capability and capacity of learning rather than the accumulation of a set of skills. As technology is evolving, the world is changing, and higher education is

progressing toward a global platform of delivery and accommodation. As a result, higher education administrators now focus on technology application and utilization in a changing environment (Rahim, Burrell, & Duncan, 2020).

Higher education institutions are being transformed by technology, particularly in teaching and learning (Englund, Olofsson, & Price, 2017). Higher education institutions are now forced to use more technology to reach a more diverse clientele: older students, returning graduates, and professionals needing updating, to increase student enrollment and increase revenue (Arunasalam, 2016). Technology permits institutions to use technology in the form of primarily online learning, to reach both domestic and foreign students, often using contingent faculty without having to increase physical infrastructure (Dennis, 2018).

How an institution manages its virtual presence has become as important as how it manages its campus and physical presence. The confluence of technology, demographics, and personal requirements makes new instructional delivery systems, new learning activities, and new learning opportunities imperative for higher education survival (Gerybadze, 2020).

However, no one was ready for all instruction to take place online during a pandemic. Thus, the focus for higher education faculty demanded flexibility, learning and development of new knowledge, rather than specific solutions to their lack of preparation for totally online teaching (Chernikova & Varonis, 2016). The pandemic has also renewed attention to the importance of, and how little is known about, learning under stress and urgency in the middle of a crisis.

The problem was that the move to remote learning was abrupt, and not well-planned out. The subsequent implications for teaching, enrollment, faculty, staff, and operations with the rapid move challenged digital infrastructures the ideas of digital literacy; digital pedagogies were mostly unexplored, and rarely prompted any in-depth thought from the course directors or lecturing staff, who received minimal support in the haste to move online (Guthrie, Bond, Kurzweil, & Le, 2020).

Online Learning: The Need for Planning

The massive, disruptive shift to move all existing courses online in a matter of days had to incorporate traditional face-to-face classes, hybrid and partially online classes, as well as labs, practicums, and on campus program courses (Kornbluh, 2020). In general, a complete online course requires an elaborate lesson plan design, teaching materials such as audio and video contents, as well as technology support teams (Moore & Hodges, 2020). However, due to the sudden emergence of the COVID-19 virus, many faculty members faced the challenges of lacking online teaching experience, early preparation, or support from educational technology teams (Arora & Srinivasan, 2020).

Yet, it was also a demonstration of the impact of poorly resourced institutions and socially disadvantaged learners where limited access to technology and the internet impacted on organizational response or students' ability to engage in an online environment (Huang, Liu, Tlili, Yang, & Wang, 2020). Online education involves more than simply uploading educational content; rather, it is a learning process that provides learners agency, responsibility, flexibility and choice (Anwar, 2020). It is a complex process that requires careful planning, designing and determination of goals to create an effective learning environment (Houlden & Veletsianos, 2020).

To accommodate online learning, institutions needed to go beyond sharing simple tools, tips and tricks and instead focus on the learners' needs, learning contexts, and the availability and accessibility of the tools (Riggs, 2020). What is currently being done should be considered

a temporary solution to an immediate problem. For instance, in the US alone, about 2.4 million undergraduates, which is equivalent to 15% of the total undergraduate students in the US, studied entirely online in the fall of 2019, according to Eduventures. These figures reflected that, even before the outbreak, the use of online education was already low (Kumar, Kumar, Jain Palva, & Verma, 2017). Moreover, few institutions had the capacity to arrange a distance learning program for all their students (Crawford, Butler-Henderson, Rudolph, & Glowatz, 2020).

Other concerns for higher education institutions included multiple lawsuits filed in the US by students attempting to recover funds paid for housing, fees, and missed opportunities for learning. And some students claimed that their learning experiences in online education were not of the same quality as those experienced on campus (Richardson, Sheeks, Waller & Lemoine, 2020).

While moving instruction online enabled the flexibility of teaching and learning anywhere, anytime, the speed with which this transition happened was unprecedented and staggering (Bao, 2020). Although campus support personnel and teams were usually available to help faculty members implement online learning, these teams typically supported a small pool of faculty interested in teaching online, rather than the entire faculty of a higher education institution as well as students who had not previously participated in online learning (Golden, 2020).

Students were also impacted by the move to online (Cao, Fang, Hou, Han, Xu, Dong, & Zheng, 2020; Rohman, Marji, Sugandi, & Nurhadi, 2020; Yang, Bin & He, 2020). Additionally, many universities do not have enough infrastructure or resources to facilitate online teaching. Is it possible to teach practicums and labs, music and art courses online (Valachopoulos, 2020)? What will happen to those students whose courses cannot be taught online? The quality of online education is a critical issue that needs proper attention through planning and assessment (Manian, 2020).

Will the pandemic make online instruction go viral (Lau, Yang, & Dasgupta, 2020; Lederman, 2020a)? What will happen with fall enrollments if online is the only choice (Lederman, 2020b)? Is online learning the inevitable future (Naqvi, 2020; Tam & El-Azar, 2020)? If online learning is the future, more planning is necessary to make it efficient and effective for students, faculty and the institution (Coates, Kelly, & Naylor, 2017; Gewin, 2020).

Given the degree of uncertainty about future finance, future markets and future student behavior and online learning, leaders face a difficult challenge.

IMPLICATIONS FOR HOW TO PLAN FOR THE FUTURE

(1) All good future-focused thinking begins with a clear, unvarnished and realistic view of the current state of the institution. What are the 5 to 7 key descriptors of the current state in terms of: (a) financial position; (b) market position; (c) technology position; (d) staffing position; and (e) risks and failures? The core of this work is using data and evidence, not speculation.

(2) Before the COVID-19 lock-down, all higher education institutions had initiatives and plans. Plans need to be regularly reviewed against the known uncertainties and risks of the present and future.

(3) It will also be useful to ascertain the changing thinking of funders, especially governments for public colleges and universities: are they likely to use the precariousness of the current moment to change the systems, structures, funding and roles within the higher education eco-system over which they have leverage? Will they use the power of agency to reshape and reconfigure the system and its work? University decision-makers need to make both skillful and strategic decisions.

(4) There is a need to revisit the institutional mission statement asking the questions: what does it mean right now and for the foreseeable future to be the institution we are? What does the world expect of us?

(5) To what extent do we want to leverage technology-enabled learning as key to our future? One strategic move might focus on investments in the professional development of staff to improve and enhance technology-enabled learning and to deepen their understanding of the pedagogical and andragogical methods of online learning. Additionally, expand digital capabilities as there is a need to build resilience and agility to handle future issues that allow the institution to remain competitive.

(6) Being proactive is a better position to be in than being overly reactive.

(7) With concerns that students may not return to classes for extended periods of time, it will be important to consider technology as a form of risk mitigation, a method to continue to attract and retain students.

(8) Leaders and institutions must develop agility to respond to crisis.

(9) There is a need to review and consider the insight and abilities needed to respond to an evolving crisis.

(10) Planning is key to success. Scenario-planning exercises need to consider decisions that might be needed in the short-term, medium-term, and long-term to ensure differing responses from the university to a crisis that keeps changing.

(11) Flexibility in planning for student needs is critical. More emphasis should be placed on meeting actual student needs rather than prescriptive programs. Again, there is a need to plan with all stakeholders having input.

(12) To be successful in the post-pandemic world, higher education institutions have to plan to be much more flexible and adaptable.

(13) Actively plan for a second pandemic.

(14) Traditional universities have to offer something more than just online learning because institutions doing online learning for years were much better at online learning for students who only wanted an online approach to learning.

WHAT ARE THE AREAS WHERE PLANNING IS NEEDED?

(1) Financial
(2) Faculty use of online (Faculty development)
(3) Technology infrastructure
(4) Maintenance and operations (cleaning and sanitation in dorms and facilities)
(5) Student engagement (what areas are open, how are students to social distance)
(6) Information (students and faculty; what is happening and how)
(7) Stakeholders (continuous information)

CONCLUSIONS

(1)   Higher education institutions need to seize this opportunity to strengthen their evidence-based practices, including planning.

(2)   The global pandemic has demonstrated that the education system, in general, is unprepared and vulnerable to external threats.

(3)   Higher education institutions can expedite their response for continuous learning for faculty. This brings an opportunity for higher education institutions to scale up the training of faculty for online learning instruction which improves student learning.

(4)   Although institutions that normally teach face-to-face in classrooms or on campuses will likely return to that mode of instruction, special arrangements put in place during the COVID-19 crisis will leave a lasting and indelible trace.

(5)   The pandemic has the potential to be an enabler of more flexible and innovative digital methods of education but could also lead to less quality assurance activities while the focus is on revenue mitigation. Universities undergoing a rapid change period need to be conscious of their ability to continuously monitor the quality of the learning design.

(6)   The quality of the learning online needs further study. There was no time to get into details of quality assurance of online teaching as the main goal was to save the education process and continue it in any possible format.

(7)   Higher education institutions will need to rethink operations, financing, staffing and their role in rebuilding communities as a result of the pandemic.

(8)   While not all experiences of remote teaching were positive, many faculty and students now better understand online learning.

(9)   Many higher education institutions need to plan for refocusing of programs based on need and demand.

(10)   The pandemic has demonstrated that the internet, including social media, provides powerful communication channels for global higher education institutions.

(11)   Technology and globalization are sweeping higher education leaders towards a future dependent upon knowing *how* more than knowing *what*.

(12)   The pandemic has once again illustrated the strategic importance of planning for higher education institutions.

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ISEP 50 – THE ILLUSION OF PLANNING:
NOTES FROM MY DIARY

DAN INBAR
The Hebrew University 0f Jerusalem, Israel

"If we shadows have offended,
Think but this, and all is mended,
That you have but slumber' d here
While these visions did appear.
And this weak and idle theme,
No more yielding but a dream,
Gentles, do not reprehend:
if you pardon, we will mend:"
(Midsummer Night's Dream, Act V, Scene I)

1970 was indeed an unforgettable year. ISEP was established, and I completed my Ph.D. degree in education at the University of California, Berkeley. To be sure, there is   no connection between these two so important   events. But, this was the beginning of a long friendship.

My first close experience with ISEP took place at the 1978 conference in Toronto. It was an overwhelming experience. To try to explain why, let me compare it with the AERA annual meetings.

If names matter, then AERA is the **American** Educational Research Association, with thousands of international participants and members from all over the world. ISEP in those days was an **international** society in name, but with just a handful of international members and participants. AERA is an association, while ISEP is a society, two different orientations and two different social climates.

In ISEP, in general, the executive or the steering committee meetings are open to all members. Hence, at my first Toronto's ISEP conference I attended the steering committee meeting which dealt with establishing the constitution of ISEP. The issues discussed were on the election of the executive committee, the internationalization of ISEP, and the strategies to enlarge the membership. If I recall correctly, in the executive committee there were 12 members, divided into three classes serving three years. Very simple, each year class three goes home, class two becomes three, class one becomes class two, and a new class one is elected. If someone departs a replacement is elected, conditioned on that he or she was not in the last round of classes. Do you comprehend? It took me time to discover that there was a distinguished professor who had a small notebook through which he controlled the process, and if someone attended several conferences he or she had a real opportunity to serve on the committee, and, in time, as I learned, this is one of the warmest places in the society. You wouldn't get lost in the crowd, you are a part of a society.

I rigorously participated in numerous steering committees during the many conferences I have attended, and I found out that the issues of internationalization of ISEP and the strategies to enlarge the membership were always on the agenda. There was an ongoing inner drive to grow and to triple the number of participants in our conferences. But it did not work out. Why? Maybe we did not really want it. We enjoyed our comfort zone, keeping our society compact when each conference becomes an interesting, warm gathering of friends, which also opened the opportunity

for academic advancement. But, on the other hand, ISEP succeeded in its internationalizing goal. The change became evident toward the celebration of the new century. In 2000 we had the first conference outside the U.S. in Port-of-Spain, Trinidad. Since then, every third year ISEP has held its conferences outside the U.S.A. in Istanbul, Budapest, Bologna, North Cyprus Republic, and Lisbon.

1991 was the year of the First Gulf War. ISEP conference was held in Oklahoma. I enjoyed two days without any missiles' siren alerts. In one afternoon session, all the men came dressed "correctly" in suits and ties, except for me, as one of my friends said loudly, "Dan is OK, he can afford it. He has just been elected ISEP's president." I heard that and learned my lesson. In the next morning, when I prepared to open the last session, I of course appeared with my tie on. I was the only one in the room who wore a tie. When I asked why no one else was wearing a tie, the answer was "If our president doesn't have a tie on, why should we do?"

In the sixties and early seventies planning was blooming. Planning was considered to be a way of thinking, a basis for decision making, a symbol of rationality, a necessity for change and educational reforms, a way of controlling, and a prescription for formative evaluation. Managers, administrators, planners, and leaders basically followed the sentence attributed to Benjamin Franklin "If you **fail** to **plan**, you are **planning to fail**." Politically, planning became a legitimizing frame for budgeting, goal setting, and use of power. Consequently, it should not be surprising that the contra moves appeared in the article "If planning is everything, maybe it's nothing" (Wildavsky, 1973).

But the idea of planning was not given up. Practitioners and academicians developed contingency planning, distinguished among rational planning, incremental planning, and mixed scanning, recruited help from the term "improvisation". The idea of "goal free planning" came up. We discovered the cloudy side of planning: as a process which inherently leads to structuralization, echoing Dwight Eisenhower's words (1957), "planning is everything, the plan is nothing."

Then, the long-range planning, short-range and practical planning or, in other words, the distinction between strategic, tactical and operational planning came into use. Indeed, time is the hard core in planning. But time is quite illusive. It is relative, as Einstein stated. And in my long experience I realized that time is also relative to age. When you are young time seems to be short. For example, "So soon? I have just started to play and now I have to do my homework! No, I didn't waste my time by watching TV, I was doing it just for a couple of minutes," complained the 9-year-old child. But, on the other hand, the little child protests, "I am only in the fourth grade, and I still have eight years to graduation. It is endless. I will spend my whole life in school."

When I grew older, I discovered a new angle of time perspective. I get up in the morning and have all the time in the world. I eat a healthy breakfast, read the newspaper thoroughly, and slowly, slowly I go to the doctor. On the other hand, I meet a colleague and I say: "It can't be, just the other day when we met, your son was starting school and now he is being recruited into the army?"

It turns out that when you are young, the hours flow quickly and the years crawl slowly. And when you are old, the hours drift gently by, but the years pass swiftly. Hence, isn't time relative to age?

So, is planning only an illusion? An endless effort to close the gap between what should be done, what can be done, and what really is done?

Now, one more question remains unsolved: How could a small society like ISEP without a solid infrastructure accomplish 50 conferences, in 10 countries, about 20 states and about 35 different cities? The answer is simple: Good people and good planning.

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PERSONAL REFLECTIONS OF ISEP – 2020

GLEN I. EARTHMAN
Virginia Polytechnic Institute and State University, U.S.A.

The first conference of the Society for Educational Planning that I attended was in 1985. The conference was held in the Muhlenbach Hotel in Kansas City, Missouri. Dr. George Crawford planned and hosted the conference. There were approximately 60 individuals registered for the conference. On the second day of the conference I made a presentation on using Geo-referenced Data to project student populations. As usual there was a lively discussion based on the presentation. I particularly remember Ron Lindahl questioning me about the usability of the projection method. Nevertheless, the conference was a success. Ron became a very close friend and strong advocate for ISEP. The conference impressed me so that I wanted to begin attending regularly. I was seconded, however, to Wolverhampton Polytechnic Institute in England for the following year and could not attend the 1987 conference. Virginia Tech at the time had an exchange program with the Institute and I was selected to go to England for that year.

Although every conference that I attended since 1985 was an exciting and informative experience, there were some conferences that remain in my memory more so than others. These conferences were something that would remain with me over the years. In almost each instance of a conference referenced, I had some responsibility to discharge: hosting the conference, establishing a new activity, or helping with a memorable experience.

The 1990 conference was in Oklahoma City with John Fink and Meridyth McBee planning and hosting the meeting. The conference was held in the Waterford Hotel. John Fink at the time was the Secretary/Treasurer for The Society. At the conference Dan Inbar of The Hebrew University in Jerusalem was elected president of the Organization. This was the first time a member from overseas was elected president. Dan was a long-time member and worker in ISEP. His presentations were the high light of many conferences. I considered him a very close friend and colleague.

In 1992, I was assigned to plan and host the conference in Virginia Beach. I enlisted the assistance of two former students of mine to help on the planning. The students did such a great job of planning that we had record 120 individuals registered for the conference. The program had so many presentations that double presentations were in order. The attendance was fine, but the fact of two presentations at one time prevented members from hearing all of the presentation they wanted to hear as they had in every previous conference. The program also called for a river cruise on the historic James River. Dinner was served on board and everyone enjoyed the evening. This was the first time a cruise was included in the program and it turned out to be very rewarding.

The 1993 conference was held in the Lewiston-Porter School District in Niagara, New York. Walt Polka planned and hosted the conference. Although the conference was very enlightening and interesting, the highlight of the conference, however, was watching Walt Polka dance the polka. He did very well and there was even a German Band to provide the appropriate music. Walt scheduled a cruise on the Niagara River. The cruise boat went very close to the giant falls causing some to get a little wet, but it was very enjoyable.

At the 1993 conference I was elected President of The Society. My two-year term of office started that year. The 1994 conference was scheduled to be held in Nashville, Tennessee. I volunteered to plan and host the conference. The meetings were held in the Holiday Inn. Approximately 38 individuals registered and attended the conference. One memorable event, beside the

presentations, was a visit to the Grand Old Opry where we heard some very good country music. I cannot remember the exact musical stars who performed, but they were some of the best of the day. We also visited the guitar museum on the same site. The last day of the conference the group was taken on a river cruise on the Cumberland River. Again, dinner was served on board and everyone enjoyed the event. The river cruises became part of the conference program for the next few years.

The 25th Anniversary Conference of The Society was held in 1995 at the Pan Pacific Hotel in San Diego, California. K.C. Bibb and Milan Mueller planned and hosted the conference. This was the second time the ISEP conference was held on the West Coast. Attendance was good. Approximately 35 individuals registered for the conference. Although there was not a cruise scheduled for the program, the group was able to visit a Japanese Cruiser harbored in the bay just a few blocks from the conference hotel. That was a good excursion, but at times felt a little eerie – a Japanese ship in an American Harbor seemed rather strange. The sailors on the ship were very polite, at least those who could speak and understand English. Allen Guy, who was a long-standing member and worker, wrote a 25 year history of ISEP. The document was printed as an ISEP history and distributed to the members in attendance. The history detailed the work of the many individuals who worked in The Society and made it a better organization that lasted for 25 more years. Much gratitude should be given Allen for his work in writing a history of the organization.

David N. Wilson was a long-standing member and worker in The Society. He was also a world-renown expert in the field of Vocational Education. He advised foreign governments on various matters in Vocational Education. He was a member of the Board of Directors for many years. He unfortunately passed away in 2006. David was a very good friend of mine and I thought he should be honored for his work. Julie and I hosted the conference in Minneapolis, Minnesota. In memory of David, I initiated a lecture in his name in 2007 during the conference. That was the first time the lecture was given and the speaker was Dr. Thomas Gillaspy of the Minnesota State Department of Education. His lecture was titled "Using Demographic Tools in Educational Planning." During the 2009 conference the ISEP Board of Directors voted to permanently establish the David N. Wilson Lecture to be delivered each conference and provided for a stipend and plaque to be awarded to the speaker.

Bob Beach has been a member of ISEP longer that I can remember. He was active in the organization for quite some time before I started to attend conferences. He served as the Editor of *Educational Planning* for many years and did a very creditable job. Bob Beach and Ron Lindahl were long-standing friends and in the latter part of their careers were able to both be employed by the same university – Alabama State University located in Montgomery, Alabama. They were tasked to develop a doctoral program in Educational Leadership for the university. They did a masterful job in planning the program and the program is still in operation. They would cooperate in making thoughtful presentations at conferences each year. The two of them could be considered experts in the theory and practice of educational planning. Unfortunately Ron passed away in September 2017, but Bob is still an active member of The Society.

The first publication ISEP issued was a newsletter edited and printed by Cicely Watson of the University of Toronto. After a few years of publication (1970-1973), the newsletter was no longer printed and in 1974 the present journal was started and has since been the official publication of The Society. Bill McInerney and Bob Beach were early editors of the journal and did a splendid job. *Educational Planning* has had at best a rocky existence since first published. There have been times when the editor simply did not publish the journal, apparently because of other vocational pressures. There have been several excellent editors, however, who have kept the journal going.

The two most recently were Dr. Linda Lemasters and Dr. Tak C. Chan. Dr. Lemasters took over the editor's position in 1989 and brought the journal back to its original excellence after a hiatus of several years. She was responsible for the journal to be listed in several publication organizations that enhanced the distribution of the journal. Dr. Chan took over the positon of editor following Linda Lemasters and has kept the journal published since. Dr. Chan also has done an excellent piece of work in editing the journal. He has been assisted by several associate and assistant editors. Most notably have been Walt Polka, Peter Litchka, and Holly Catalfamo.

In 2010, Mark Yulich began the publication of a newsletter to keep the members informed of the activity of the membership. Mark printed the newsletter on line for several years. Needless to say the newsletter was a success. After Mark retired for the Kansas City Public Schools he stopped publishing the newsletter, much to the regret of the membership.

The history of ISEP has had its starts and retrenchment, but has always been a positive organization in the field of educational planning contributing to the development and implementation of good planning. Membership in the organization has varied from conference to conference, but the faithful members have maintained the organization in much the same fashion as before. There seems to be a central core of members who always step forward to make certain ISEP never falters.

Sometimes the question of where will ISEP be in the next 25 years arises in discussions about the future directions of ISEP. I suspect every viable organization comes across this question at some time or the other. Most certainly ISEP has changed since the first few conferences of The Society. The nature of ISEP has changed over the years. At the beginning of the organization the percentage of articles in Educational Planning devoted to the subject of planning in educational organizations was very high. In the most recent issues of the journal, the percentage of articles devoted solely to the practice and examination of planning in educational organizations has decreased measurably. More and more the Journal contains articles devoted to topics other than educational planning as such. For instance, in one of the 1980 issues of the Journal all four of the articles addressed planning in educational organizations. This is in contrast to the contents of the Journal in 2020. This shift is also reflected in the type and number of presentations at the annual conference in the last few years that do not deal directly with educational planning. This shift in journal and conference content is not inconsistent with the way in which the field of planning has changed in educational organizations. Educational Planning today is very different from the type of planning that was practiced back in 1990. Yet, ISEP is a very vibrant organization that serves the needs of publication and presentation for researchers both in the United States and in various foreign countries.

Over the course of the years that I have been associated with The Society I have met and worked with many individuals. Some of these individuals were well established professors and others were just beginning their careers. In every instance the person was interesting and informative to me and I enjoyed the association. Everyone who has ever attended a ISEP conference has been a definite asset to the organization. Association with these individuals has been both enlightening and enjoyable for both Julie and me. Julie served as registrar for several conferences before retiring and knew most of the members.

Needless to say, my life has been so enriched by meeting and working with the people mentioned above and all of the other individuals with whom I came in contact with that I could never repay ISEP in any way for this great experience. My life has been much better and more productive because of ISEP.

A SUCCESSFUL LEADERSHIP CAREER THAT BECAME
EVEN MORE REWARDING THE LAST 30 YEARS WITH ISEP

WALTER S. POLKA
Niagara University, U.S.A.

One of the most profound and significant years in my career trajectory was 1990. In May, I was appointed as Superintendent of Schools of the Lewiston-Porter Central Schools, Youngstown, N.Y. where I eventually served for 13 years until my retirement from public school administration. In October of 1990, I became a member of the International Society for Educational Planning (ISEP). The following are my three decades reflections of my very meaningful experiences with members of my ISEP family since October, 1990, to present:

1990 – 1999 MY FIRST ISEP DECADE:
THE EARLY YEARS GETTING TO KNOW MY NEW FAMILY

At my first ISEP Conference in Atlanta, I had an awesome experience of meeting outstanding internationally recognized educational leaders who exerted a profound influence upon me. Ken Ducote from the New Orleans Public Schools was the conference chair of that ISEP Atlanta Conference and warmly welcomed me into the ISEP family. Bill McInerney of Purdue University and both Bob Beach and Ron Lindahl of East Tennessee State immediately became valued colleagues and close confidents. I enthusiastically attended conference presentations by George Crawford of the University of Kansas and Dan Inbar of Hebrew University in Jerusalem, Israel, both of whom impressed me with their creative presentations and continued to do so for the next two decades.

In 1991 the ISEP Conference was held in Oklahoma City, Oklahoma, where I enjoyed the growing camaraderie of interacting with my ISEP family members and enjoying the company of such ISEP luminaries as: Glen Earthman from Virginia Tech and two of my favorite Canadian members of ISEP: David Wilson of the Ontario Institute for the Study of Education (OISE) and Allan Guy from the University of Saskatchewan.

The 1992 ISEP Conference was held in Virginia Beach and was a well-organized meeting. Glen Earthman was the Chair and provided me with acute insight into ISEP Conference operations since I volunteered to chair the 1993 Conference in Niagara Falls, N.Y. In Niagara Falls we had several presentations that included local educators who were summarily impressed with my ISEP family members. Chairing this ISEP conference was very gratifying for me both personally and professionally as I was able to show my ISEP family members my hometown and my Western New York colleagues were able to meet my impressive ISEP family members.

The 1994 ISEP Conference was held in Nashville, Tennessee and was another professionally enlivening experience as I began work with Allan Guy on a theoretical framework related to the American school as an open-social system that has resulted in several publications and presentations. Also, personally, Nashville was refreshing as my ISEP family enjoyed the country music capital, danced in a few of the main street establishments as well as on a Riverboat on the Cumberland River. Several of us went to a performance at the Grand Old Opry and saw Mini Pearl and Junior Samples perform. But, a very memorable experience of that conference for me was the day after the conference when Allan Guy and I traveled to both the Home of Old Hickory and the Jack Daniels Distillery where we learned interesting facts about not only Andrew Jackson but also how Jack Daniels was distilled and how the sour mash initially tastes!

I reflected about my first few years as a member of the ISEP family and marveled at the intelligence of the members, their professional commitments, and their adventuresome spirit. I felt very lucky not only to be a member of such an audacious family but also to be selected as a Board of Directors member in such a short time.

The excitement of my ISEP involvement continued in 1995 as the ISEP Conference was held in San Diego, California. This was another personally and professionally exciting conference as most of our ISEP family went to see the Los Angeles Dodgers play the San Diego Padres in a key baseball game with playoff implications. Also, some of us traveled into Tijuana, Mexico, to shop. The shopping experiences with Donna Ferrara of Long Island University and Ken Tanner of the University of Georgia were incredibly interesting while Allan Guy and his spouse, May, added "reserve" to our shopping spree. In addition, at this conference, I was elected President of ISEP. What an honor to be so recognized by my ISEP family members.

In 1996 we journeyed to New Orleans for our annual conference and had excellent session presentations organized by Ken Ducote as well as enjoying the food, jazz, and ambiance of the French Quarter. At this conference two very significant ISEP family members joined our family: T. C. Chan of Georgia Southern University, and Selahattin Turan of Istanbul, Turkey. I co-chaired the 1997 ISEP conference with Betty Goins of the Newark Public School System. Our sessions were quite stimulating and the experiences at Independence Hall, Liberty Bell Museum, and the ISEP Dinner at the Colonial Tavern were very enjoyable but running up the steps (Rocky Style) at the Philadelphia Library pushed some of us to the limit! But, how about that memorable Southern New Jersey (Yes, Southern New Jersey) barbecue at Betty and Bobby's house! A delicious treat for all. In 1997 I was elected as Treasurer of ISEP and served the organization in that capacity for the next six years. David Wilson was the chair of the 1998 conference in Toronto, Canada. The presentations were again very insightful and the memories of experiencing the world's most multi-cultural city are still resonating with ISEP family members who attended. Bill McInerney was chair of our 1999 annual conference in Indianapolis, Indiana. The conference presentations that he arranged were as vibrant as the sights and sounds this Mid-West metropolis.

My first decade with my ISEP family was truly rewarding, inspiring, and very gratifying as my ISEP family continued to provide me with much support and guidance as I dealt with the trials and tribulations of being a practicing superintendent of schools. Those ISEP Conferences were "safe havens" for me and every year, I anxiously looked forward to going to my "ISEP Home" to reconnect with my caring ISEP family members.

2000 – 2009 MY SECOND ISEP DECADE:
THE MIDDLE YEARS – ENJOYING MY NEW FAMILY EVEN MORE

My second decade as a member of this incredibly caring international group of scholars started with a very unique conference held in Port-Of-Spain, Trinidad, West Indies. This 2000 conference, organized by Rudy Mattai of Buffalo State College, and Ganga Persud and Trevor Turner of Clark Atlanta University, was the first ISEP conference held outside of the US or Canada. It was an amazing international adventure and reinforced for our family members the need for us to schedule more conferences in other countries of the world. The 2001 conference was held in Atlanta, Georgia and chaired by Ganga Persud assisted by T. C. Chan from Georgia Southern University. T. C. has become a close ISEP relative of mine and professional confident. Unfortunately, this conference was held a month after the horrific 911 tragic event and the attendance was limited. However, this was also a significant ISEP Conference for me because my very dear family members including T. C. and others like: Rudy Mattai, Bill McInerney, Bob Beach, and Ron Lindahl provided

me with acute insights about my post-retirement higher education opportunities. Actually, T. C. encouraged me to apply at Georgia Southern University which I did. Subsequently, I entered my full-time higher education career in 2002 as an Associate Professor immediately after retiring as superintendent of schools. That is what a professional caring family can do for you!

I did not attend the 2002 ISEP Conference in Istanbul, Turkey, as I was transitioning at that time from my public school superintendency to Georgia Southern University. The 2003 ISEP Conference was held in Seattle, Washington with Rudy Mattai serving as Conference Chair. This was another fine ISEP family gathering. The 2004 ISEP Conference was held in Washington, D.C. and Linda LeMasters and Virginia Roach joined our ISEP family as very active members. In 2005 our ISEP family travelled to Bologna, Italy, for another international conference conducted outside of the USA and Canada. Donna Ferarra developed an excellent conference location for us and the short walk to historical Bologna University added a unique scholastic dimension to our conference.

In 2006 we held our annual conference in Pittsburgh, Pennsylvania where not only did we enjoy riveting conference sessions but also the uniqueness of this historical industrial American city that effectively transitioned into the post-industrial "high-tech" era. At this conference we welcomed two of my dearest colleagues into our ISEP family as Peter Litchka of Loyola Univeristy Maryland and Abebayehu Tekleselassie, currently of George Washington University, joined the family. Both have become key leaders of ISEP since that time. In 2007, Glen Earthman served as Chair of our annual conference in Minneapolis and again did a superb job of organizing interesting sessions for us. Our 2008 conference was held in Istanbul, Turkey and again, Selahattin Turan, chaired a truly wonderful international event. Obviously, ISEP family members are committed to our organization and are willing to provide their leadership over and over again for the good of our global family. At this time, Adam Nir, Hebrew University of Israel, and Ronit Bogler, Open University of Israel, joined our family and became very active members. In 2009 we journeyed to Savannah, Georgia, for Southern Hospitality and Low Country Cuisine as well as an enjoyable dinner-dance cruise on the Savannah River. Several stimulating conference sessions were held at this conference. Mary Chandler joined our family and we all were immediately impressed with her acute leadership skills and extraordinary caring presence.

My second decade with my ISEP family continued to be a professionally and personally rewarding series of annual anticipated experiences for me and I was pleased that our society continued to grow with the addition of more highly motivated and highly committed individuals who genuinely care about one another. I also continued to grow as a scholar during this time period supported by my ISEP family members.

2010 – 2020 MY THIRD ISEP DECADE:
TRULY APPRECIATING MY ISEP FAMILY

During my third decade in ISEP, I specifically called upon my ISEP family members, Bill McInerney and Bob Beach to assist my efforts to commence a new PhD Program in Leadership and Policy at Niagara University. I returned to Niagara University in 2008 and one of my goals was to develop such a PhD program. Of course, who do you call when you need expert help but your family members? Bill and Bob spearheaded the initial committee charged with designing the program and returned the following year to evaluate its implementation. They performed excellently as consultants and the new program grew in size and stature in Western New York and Southern Ontario. Currently, over 75 leaders have received their PhDs in the program with about 25% of them Canadian and several from other countries such as: China, Ghana, Indonesia, Nigeria, and Saudi

Arabia. The international flavor that Drs. McInerney and Beach instilled in the program is a key ingredient of its success.

The 2010 ISEP Conference was held in Alexandria, Virginia and Linda LeMasters and Virginia Roach orchestrated an excellent conference that included opportunities for our foreign family members to explore our Nation's Capital. We welcomed Glenn Koonce into our family. In 2011, we travelled to Budapest, Hungary, and enjoyed the history and beauty of the country under the superb conference leadership of Mary Chandler who enthusiastically provided us all with insights about her early life and the 1956 frightening escape that she and her family had from the Communist authorities. Mary was so proud that our ISEP family not only were with her on this journey but that we were also there when she received a Hungarian University Honor for her father who was the target of the communist in the 1950s. On the bus rides through the countryside and in Budapest cafes the "Singing Italians" became a new ISEP Legend as Peter Litchka, Robert Johnson, Joe Procochinni, and I sang some Italian Songs---actually we only knew most of one song, "That's Amore" but of course, Joe was the only real Italian in the group so our family did not expect much and even got much less. But we had much intellectual stimuli and enjoyed the culture, sights, and some of the sounds of Hungary!

The 2012 annual conference was held in Kansas City, Missouri and we all enjoyed some middle American cuisine and excellent presentations. ISEP returned to Niagara Falls, New York in 2013 and again I had the privilege of showing off my ISEP family to my regional colleagues and giving my ISEP family members opportunities to enjoy the grandeur of Niagara Falls and the scenery of Western New York. Jerry Wolfgang, Niagara University; Rafal Piworowski, Maria Grzegorzewska University, Warsaw Poland; John Hunt from Southern Illinois University and his spouse, Karen; as well as Terrell Peace, Huntington College, Indiana; were key ISEP family members involved in making this second ISEP Conference in Niagara Falls a meaningful experience for all. In 2014 we travelled to Kyrenia, Cyprus, for our annual meeting and stayed at a wonderful oceanfront resort. We were all entertained one night by Adam Nir and his son who played their instruments with some of the local Cypriot educators. We all had an amazing culturally inclusive experience! Our ISEP family has rediscovered its international roots and our members are becoming "academic globe trotters" and diversity promoters.

In 2015, Peter Litchka co-chaired the ISEP Conference in Baltimore, Maryland, and we had a fine array of presenters who provoked our thinking about the gaps that still exist in the US education system and those of other nations between the "haves" and the "have nots" based on the emerging digital divide. In 2016 we were back to New Orleans, Louisiana again and Ken Ducote again hosted our annual conference. The thrill of Bourbon Street and Café DuMonde were only surpassed by the elegance of our conference setting in the Monteleone Hotel with its famous Carousel Lounge and the robust presentations that Ken scheduled for us. In 2017, Jerry Wolfgang co-chaired the annual conference in Toronto, Ontario. The conference was successful as several local and regional presenters added to our usual family scholarship. The venue of our 2018 ISEP conference, originally scheduled for Kingston, Jamaica, was changed to Charleston, South Carolina due to complications with the Jamaica site. The historical setting for the conference in Charleston was unique in that our lodgings and conference meals as well as all session presentations were held in a 200 years old facility that once was the original site of the famous Citadel Military College. That refurbished Hilton Hotel was a delightful experience for our family's annual reunion but, unfortunately, a hurricane came blowing through the region and the conference schedule was abbreviated so that our family members could return home safely.

My ISEP family again ventured overseas for our annual conference in Lisbon, Portugal, but I was not able to attend this conference due to a health condition. This was only the second time in my 30 years with ISEP that I did not attend ISEP family's annual gathering. I missed everyone but I know that our ISEP family traditions were alive and well conducted. The ISEP caring family culture continues because it is a team like culture that is always evolving and including new family members. Currently, the ISEP culture has been further enhanced under the astute focused leadership of recent ISEP Presidents: Peter Litchka and Abebayehu Tekleselassie, as well as by the guidance of Board of Directors: Abdourahmane Barry, Ronit Bogler, Jodie Brinkman, Carol Cash, Angela Ford, Afra Hersi, Robert Johnson, Glenn Koonce, Adam Nir and Canute Thompson. Also, several longtime extremely dedicated ISEP members such as: T. C. Chan, Glen Earthman, and Linda LeMasters are always available for individual and organizational support. Other family members exude the caring personal approaches that are hallmarks of our family. Julie Earthman is one of those remarkable family members whose "behind the scenes" commitment to ISEP is legendary. Julie has served as the key conference registration person at most of the conferences of the past 30 years. She has been a very reliable family member whose unbridled selfless dedication truly exemplifies our ISEP family!

ISEP continues to bring caring and highly motivated international scholars together annually for quintessential intellectual discourses, research presentations, and comprehensive personal and professional collaborations. What a great family! I am so proud to have been adopted by such an illustrious family that has provided me with so many meaningful and robust personal and professional life experiences during the past 30 years.

In 1990 I composed the following poem that has been referenced several times in my ISEP publications and presentations as well as others:

Our Quest for Understanding

Several individuals have searched diligently for
Similar
patterns, structures, and expressions among
Diverse
people, things, and ideas,
In their quest for simple understanding.

Numerous others have made substantial plans to
Standardize
access, activities, and incentives among
Diverse
people, things, and ideas,
In their quest for simple understanding.

Many others have implemented forcibly with
Precision
programs, models, and assessments among
Diverse
people, things, and ideas,
In their quest for simple understanding.

Some others have evaluated wrongly, and
Rigidly
Knowledge, attitudes, and skills among
Diverse
people, things, and ideas,
In their quest for simple understanding.

Others have self-righteously worked to
Homogenize
languages, cultures and beliefs among
Diverse
people, things, and ideas,
In their quest for simple understanding.

Thus, all of us must begin now to
Humanize
histories, realities, and futures among
Diverse
people, things, and ideas,
In our quest for enriched understanding.

And, each of us must genuinely try to
Appreciate
difference, uniqueness, and individuality among
Diverse
people, things, and ideas,
In our grand quest for enlightened understanding.

I often reflect about the significance of the above composition to me as a manifestation of my ISEP family experiences. As a result of my 30 years of being a member of the ISEP family and travelling around the world to reunite with family members annually, I have genuinely satisfied my quest to appreciate the values of diversity and inclusion. And, I have developed an enlightened understanding of the beauty of humanity in our global village. In 2020 there are various international crises including: economic and political disruptions, a ubiquitous global health pandemic, and persistent issues of institutional and personal discrimination and bias. We all need to find solace in the humanity of each other, especially our dear family members and continue our personal and organizational quests for better understandings. The International Society for Educational Planning provides a global family unit with an annual "safe haven" reunion of caring scholarly people who nurture and sustain each other. I have truly been blessed to be a member of this family!

And, I know that You have as well! Thank You to all past, current, and future members of the ISEP Family. Very Sincerely Yours!

Editors' Note:
Dr. Polka has served the International Society for Educational Planning (ISEP) since he joined in 1990 including: President, 1995-97; ISEP Treasurer, 1997-2003; Board of Directors member 2005-2011 and 2015-2021 as well as Associate Editor of *Educational Planning* 2012-Present. He also Chaired or Co-Chaired the following ISEP Annual Conferences: 2018 (Charleston, S.C.); 2, 017 (Toronto, Canada); 2015 (Baltimore, MD); 2013 (Niagara Falls, NY); 2009 (Savannah, GA); 2006 (Pittsburgh, PA); 1997 (Philadelphia, PA); 1993 (Niagara Falls, NY).

MY MEMORIES OF ISEP

DONNA L. FERRARA
Long Island University, U.S.A.

I joined ISEP in 1992 not because, quite frankly, I knew anything about the group and its work but because my dissertation chair at New York University encouraged me to submit my dissertation, *Teacher Perceptions of Participation in Shared Decision Making in New York State: Actual and Desired Participation, Deviations Between Actual and Desired Participation, and Domains Identified from Participation Measures,* to ISEP for consideration for its Glen Earthman Outstanding Dissertation Award. That year two dissertations won awards. My dissertation won an award in the category of Research Design.

At the conference, that year in Virginia Beach, Virginia, I made two presentations: "Teacher Perceptions of Participation in Shared Decision Making in New York State" and "Planning for Shared Decision Making Via Quantitative Assessment: Methodology and Implications."

I found the members to be hospitable, welcoming, and passionate, not only about their own work but the work of others in their group. There was a wide spectrum represented in the group across many areas of educational planning, from facilities planning to strategic planning and curriculum planning, among other areas of interest to educational planners.

I continued my association with ISEP until two years after my retirement from my university. To say we had adventures across the globe is a bit of an understatement. I attended conferences between 1992 and 2005 in such various places as Virginia Beach, Niagara Falls, Nashville, San Diego, New Orleans, Philadelphia, Toronto, Indianapolis, Port-of-Spain, Trinidad, Atlanta, Istanbul, Seattle, Washington, D.C. and Bologna, Italy.

During this time, in addition to conducting research in the U.S., I also conducted a study in Belarus after the break-up of the Soviet Union (thanks to a connection through my doctoral chair at NYU, Dr. Theodore Repa) and two studies in Italy (through a connection I had established with Dr. Cesare Scurati at Catholic University in Milan after I had read his article in Educational Leadership on Italian reform efforts), as politicians and educators prepared for the introduction of autonomous practices in Italian schools in the late 1990s. Several years later, I returned to Italy to study conditions at the point of initiation of the school reforms. The latter piece of research in Italy was conducted during my sabbatical in 2000-2001.

This Society exemplified for me people, places, and things. Since the annual conference comprised a small group of educators, there was much interaction and there were many friendships formed. The people that we met left, for me, indelible impressions for life. The places for our annual conferences were "on-shore" and "off-shore," that is, every attempt was made to rotate between U.S. venues and foreign venues. We were exposed to various cultures, landscapes, languages, and cuisines. "Things" were exemplified by all the tidbits and "big" bits of ideas and information that we carried away with us each year; they inspired us, added to our treasure trove of knowledge, and sometimes coaxed us to paradigm shifts in our thinking, expanding our horizons and world view.

I was fortunate enough to host the conference in Bologna, Italy, in October of 2005, and the year I was President, 2002, the conference was in Istanbul, Turkey – so for me personally, two of the more memorable conferences were hosted on foreign soil. If there is such a thing as a Turkish princess, I felt like one that year, especially considering the gifts that were bestowed upon me by

our Turkish hosts as President of the organization that year. My son, who was living in London at the time of the Bologna and Istanbul conferences, was able to join us as was my husband who came from the States.

The Bologna Conference is also a sad memory for me. I got a call on late Wednesday of the conference from my sister's nurse. My sister had terminal pancreatic cancer; the nurse told me that if I did not get back to the States by late Friday, I would no longer be able to talk to her as her death was imminent. My husband and I acquired tickets to Providence, Rhode Island – three flights from Bologna to Frankfurt, Frankfurt to Philadelphia, Philadelphia to Providence. My son was due to fly to Bologna from London on Friday to join us at the conference as he and I both speak Italian. He changed his flight to late Thursday, and at close to midnight Thursday night, I handed all conference materials over to him so that he could take over my duties. My husband and I left the hotel at 5:00 am Friday morning for the airport in Bologna.

We arrived at my sister's house in Portsmouth, Rhode Island, at 7:30 pm Eastern time – an 18½ hour trip…but we made it! She could still talk, but by Saturday she was in a hospitable bed in her living room comatose. She died at 11:30 am Sunday morning – at which point I called my son on his cell phone in Italy. For Sunday, after the formal part of the conference had concluded, he had arranged a day trip with our ISEPers to Florence to provide a "guided tour" – he is quite the tour guide – with a luncheon break – and was returning to Bologna on the train with my dear colleagues at 5:30 pm Italian time when he got the news. I also believe that the Bologna Conference was the last time I saw David Wilson and Ron Lindahl alive. These two were stalwarts in our group, and the fact that David died at age 68 and Ron at age 69 was an incalculable loss to all of us in ISEP, especially as I think about turning 74 in August and as I recall how I idolized those two gentlemen who were my mentors. They left us too soon.

There are two more recollections that I would like to share about David Wilson. He and I would normally arrive early to conferences. In Bologna, before the conference had begun, David, my husband, and I went out to dinner together, not far from the Zanhotel Europa where we were holding the conference. Who would have thought at the time that this intimate dinner would have resulted in such a monumental memory for me…the three of us bonding alone for the last time before David's untimely death. I recall that when I got the phone call about my sister, my husband and I had to walk up to Via Ugo Bassi (the road that leads to Piazza Maggiore, the main square in Bologna) to buy our tickets for our imminent departure from Bologna. David kindly offered to run a meeting for me – without question. I had always had such respect for him. As those who knew him know, he was a tough cookie with a heart of gold, always speaking with unabated wry humor. I had been his vice-president when he was president, and when I became president, he was, of course, the immediate past-president. I felt during those years as if I had been invited into his bubble of greatness.

People have come and gone from our group over the years, largely after their retirements, and sadly, we have lost members to the heavens. But what I will always remember about my years of participation, 1992-2005, is the absolute delight with which we greeted each other annually, traditionally in the month of October. It always felt like a "same time next year" meeting, picking up where we left off and catching up on events of the intervening time.

I returned to ISEP in October of 2019, almost by accident. I had received an invitation to submit a proposal from an organization that was hosting its conference in Florida. I started thinking…I wonder what ISEP is up to…do I want to join a new group or is the opportunity to go back in time to revisit an important organization from my past irresistible? I looked up where the

conference was going to be. Oh…Lisbon. Lisbon was on my bucket list. My husband and I had already spent 36 days in Europe in the spring. I was already just about beyond – or truly beyond – the deadline for submission of a paper, the subject of which I had been yearning to share with colleagues – challenges of educational evaluators.

Contact was made, in one week I put together a proposal and in two weeks a paper… and off to Lisbon I went. This was a decision I will never regret, as after the conference was over, my husband and I headed out to Fátima and Sobral, where a close U.S. friend had moved after living for the previous six years in Italy. While there in Fátima, we made friends with a family that runs a restaurant…thanks to all of our electronic devices and their applications, we continue to communicate and will "drop in" on Fátima the next time we are in Europe. I have become a mentor to the son in the family who is now applying to graduate school in Lisbon. Our trip this spring (2020) was cancelled for reasons we all know – COVID19 – and we hope next spring we will find ourselves in Lisbon and Fátima once again where I can give proper hugs to my new Portuguese family, as well as sip Licor Beirão in their restaurant.

I know I will forget some of the people who were important to me during my years in ISEP – but still, I do want to mention some who have left indelible memories – Glen Earthman, the late David Wilson, Walt Polka, Bill McInerney, the late Ron Lindahl, Bob Beach, T.C. Chan, Rudy Mattai, Ganga Persaud, Trevor Turner, Mark Barron, Ken Ducote, Betty Goins, Selahattin Turan, Hasan Simsek, Adam Nir, Ronit Bogler, Aimee and Craig Howley, Perry Johnston and Annette Liggett (whom we visited many years ago after their move from Iowa to Key West, Florida). This year, in addition to reuniting with Glen and Julie in Lisbon, we reunited with Dan and Edna Inbar, Adam Nir, and Ronit Bogler.

Just to illustrate the small number of degrees of separation in life, I received an email in April of this year several months ago from Sarah Bardwell, a doctoral student at the University of Southern Mississippi, requesting to use instrumentation that I had expanded on from my doctoral work. The working title of her dissertation is The Relationship Between Shared Decision-Making and School Climate. In the very first paragraph of her Chapter I: Introduction was a reference: Bogler & Nir, 2012, "The importance of teachers' perceived organizational support to job satisfaction: What's empowerment got to do with it?" in the Journal of Educational Administration, 50(3), 287-306. Meanwhile, I discovered more recently (perhaps I had forgotten as I did find in my computer the letter of permission to use my instrumentation) that Don Leech, also associated with ISEP, had used my instrumentation in his doctoral study at the University of North Florida (1999). Several of Ron Lindahl's students had used my instrumentation, as well as students of Hasan Simsek. Recently, Hassan asked me to write a review of his latest book. Additionally, while I was at the ISEP conference in Lisbon last October, I received a request via email to utilize my instrumentation from a young lady at Valdosta State University in Valdosta, Georgia, who is doing her doctoral study under the supervision of Dr. Don Leech! So now we have a third generation researcher…Donna to Don to Ms. Lacey Lamb Wynn!

ISEP has been a muse of sorts for me…the honor of one of their dissertation awards when I was fresh out of my doctoral studies led to many of the cross-currents that came my way after that.

I believe that I have ISEP in large measure to thank for whatever success came my way in my post-doctoral life. To this day, 35 studies (including my own), have been done using instrumentation originally designed for my doctoral work and then later revised to reflect growth in the field of shared/decentralized decision making. I have traveled the world thanks to ISEP, and my research has been advanced around the world. Thanks to ISEP.

I am honored to have served ISEP as your President, and I am honored to have met such fine people over the years who have had such an abiding interest in and a passion for educational planning. The passion ISEP inspired in me still lives within me to this day. Thank you, ISEP.

Happy, Happy 50th ISEP! May you be around for another 50 and more…or as they say in Italian, "Cent'anni," 100 years!!!

ON DOORS OPENING

MAARTJE VAN DEN BOGAARD
Delft University of Technology, The Netherlands

In early 2015, I defended my dissertation in a full auditorium in Delft University of Technology in the Netherlands, where I had also worked as an administrator and teacher for a number of years. When I graduated from the University of Groningen with a MSc degree in education 12 years before, I knew I wanted to earn a PhD degree at some point in my life, yet I felt I did not have enough understanding of educational practice to be able to contribute in a meaningful way to the field. When I started my PhD program, I had come to realise that there is so much research out there that could add to the knowledge base without informing practice. I knew I wanted to make an impact on both.

The topic of my dissertation was student success in my own university. I set out to interview many students and I did a survey that allowed me to contrast the qualitative findings with a mathematical model. The contrast I found could not have been any larger: most of the qualitative findings I could not substantiate with the quantitative data. At a conference, I met another researcher who was developing a model for student success based on complexity theory and he did not have any data to validate his model. We decided to collaborate in our research projects and this collaboration ended up elevating both of our projects. In my case, I got a whole different understanding of my own model and data through the application of complexity theory. It allowed me to understand where the gap in my research data came from. It allowed me to draw meaningful conclusions and outline implications. Then, I challenged administrators to move away from linear thinking about student success into learning to understand it as a complex phenomenon, which implies a deviation from long standing practice.

A friend suggested me to submit my work to the International Society for Educational Planning (ISEP) to be considered for the Glen Earthman Outstanding Dissertation Award as it was a solid piece of scholarly work. A few months later, I received an email saying I won! To be honest, before my friend introduced me to ISEP, I had not heard of the organisation. However, it was a wonderful way to get introduced to a wonderful organisation. ISEP bridges the gap between practice and theory of administration and planning of education. I was very honoured to have my work recognised by this organisation for academic rigour and practical relevance!

Once at home, the Glen Earthman Outstanding Dissertation Award from ISEP helped me get my research work exposed. The introduction of complexity thinking in student success discourse was challenging for many administrators and practitioners, yet the international recognition of my work made people more interested and persistent in trying to learn how they could apply the recommendations in my dissertation to their educational settings. I ended up giving many talks throughout my (small) country and this allowed me to communicate with administrators and teachers in secondary and higher education, and with policy makers in many institutions. In addition, I have also served as a referent in research colloquia on success, policy and data use in education. In short, it has opened up many doors for me, some of which I did not even know existed. I find it fascinating how this award that I received partly for its practical relevance for the field, helped me become so much more aware of what the field actually looks like. The dissertation award has served as external validation of the quality of my work. This has proven to be incredibly valuable in starting conversations about my work with other scholars and engaging with the wider research

community. In turn, this has also opened doors to opportunities for service. I have been serving as an editor for the European Journal of Engineering Education and a reviewer for Educational Planning for almost three years now and I feel honoured about being able to support scholars and teachers (and everyone in between) to get their work out there in the field. I have been serving as head of programme of a teacher training programme for two years, where I am back as boots on the ground doing administration work again. With the team, we turned around our curriculum to make it student-centered, to create more opportunities for students to collaborate and to forge stronger connections between theory and practice.

I did not have many opportunities to engage with the ISEP community shortly after receiving my award in Baltimore, but I was able to attend the ISEP annual conference last year in Lisbon. I absolutely loved it, again, because ISEP allows us to bridge theory and practice of administration and offers a supportive environment to meet like-minded professionals. I find ISEP offers something unique to those of us who are interested in advancing educational planning and administration in a systematic way. I congratulate ISEP on its 50th anniversary and I would like to thank this community once again for recognising my work and helping me in opening up so many great opportunities as a result.

REFLECTIONS ON THE CONTRIBUTIONS OF ISEP
IN THE PAST 50 YEARS

JAMES M. WRIGHT
Kennesaw State University, U.S.A.

What an honor it is to celebrate the 50th anniversary of the International Society of Educational Planning (ISEP). The important work of ISEP has a lasting impact on teaching and learning in schools worldwide, and more importantly, continues to build a strong legacy that will influence the future.

ISEP has always been forward thinking. As the 2013 Glen Earthman Outstanding Dissertation Award winner, I am grateful for the recognition which served as a professional springboard into my career as a scholar. My dissertation titled *Planning and Implementing Online Instruction* described the importance of supporting and implementing effective teaching online. ISEP understands the importance of educational technology as a vital part of the strategic mission. For example, just seven years later online learning is now the expected norm. The current realities of the COVID-19 crisis require the use of effective online learning. Moreover, COVID-19 magnified the gaps in the quality of the technical delivery as well as the instructional effectiveness of virtual learning. Addressing these shortfalls takes keen analysis and planning for student success. Once again, ISEP serves as a platform for thoughtful and strategic conversations about facilitating school success.

Over the years, ISEP members have discovered, cataloged, and disseminated a wealth of knowledge. This knowledge has served as a guide to help schools across the globe to improve and flourish. One of the most powerful contributions of ISEP is mentoring the next generation of scholars. The work of people like Glen Earthman, Walter Polka, Ken Ducote, Ron Lindahl, Mary Chandler, Peter Litchka, Robert Beach, and Donna Ferrara (this is not an exhausted list) have had a powerful tradition of helping emerging scholars like myself. For example, I am lucky to have our friend and editor, T.C. Chan as a mentor to help me hone my skills as a researcher. The core group of scholars of ISEP have built a tremendous legacy of colleagues who are influencing the direction of schools all over the world. Mentoring is one of the vital contributions of the International Society of Educational Planning.

It was a great honor for my dissertation to be recognized by ISEP because it provided me with the confidence to be successful in other research projects. I achieved tenure and was promoted based on the mentoring I received from Dr. Chan, and now pursue an active research agenda. For example, my latest publication is a longitudinal study using a robust mixed-method design examining the impact of advanced academic degrees on teaching (Chang, Jorrin-Abellan, Wright, Kim, & Gaines, 2020). ISEP's official journal, *Educational Planning,* has published many strong studies that have made valuable contributions to advance the field. This is the value, significance, and more importantly, the legacy of ISEP.

Acknowledging the existing contributions of ISEP, it is important to keep an eye on emerging areas of research including the design and delivery of high-quality online instruction. The complexities of planning for an ever-changing learning environment will require new empirical research. I would like to extend a call to researchers and scholars studying the field of educational planning to try to close the digital divide through the integration of educational

technology in teaching and learning. This pandemic has exposed gaps in our educational technology systems making it difficult to learn online. Some families only have one computer or just a cell phone. In addition to access issues, some teachers are not equipped to teach online and require more support. Therefore, one solution is to use technology coaches as a vital part of the instructional team. Planners must consider a technology coach, or peer mentor, as a powerful way to develop teachers' own tech skills, confidence, and pedagogy.

So, can educational planners contribute to filling the gap of integrating technology to impact instruction? ISEP has a long tradition of mentoring professionals towards research and discovery. Similarly, the technology coach is a learning support professional who has a broad range of technical and personal skills to assist the general education teacher. Teachers need coaches whom they can go to for questions and issues. Using a technology coach is one method to address the impact of technology and deserves future research.

Regardless of the direction in the future, the International Society of Educational Planning has made a powerful contribution over the last 50 years. Well done ISEP!

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INVITATION TO SUBMIT MANUSCRIPTS

The editor of *Educational Planning,* a refereed journal of educational planning issues, invites the submission of original manuscripts for publication consideration. *Educational Planning* is the official journal of the International Society for Educational Planning. The audience of the journal includes national and provincial/state planners, university faculty, school district administrators and planners, and other practitioners associated with educational planning.

The purpose of the publication is to serve as a meeting place for scholar-researcher and the practitioner-educator through the presentation of articles that have practical relevance to current issues and that broaden the knowledge base of the discipline. *Educational Planning* disseminates the results of pertinent educational research, presents contemporary ideas for consideration, and provides general information to assist subscribers with their professional responsibilities.

Manuscripts preferred for inclusion are those from practitioners, reports of empirical research, expository writings including analyses of topical problems, or case studies. Unsolicited manuscripts are welcomed.

The following criteria have been established for the submission of manuscripts.

STYLE: All formatting should adhere strictly to the current guidelines set in the Publication Manual of the American Psychological Association.

LENGTH: The manuscript, including all references, figures or illustrations, charts, and/or graphs, should not exceed 20 pages. In addition, an Abstract (between 150-500 words on a separate sheet of paper) describing the focus of the manuscript should be included at the beginning of the manuscript.

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