

EDUCATIONAL PLANNING

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PROMOTING THE STUDY AND PRACTICE OF EDUCATIONAL PLANNING

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FROM THE EDITOR

The Issue

With this issue of *Educational Planning*, we present three articles relating to a theme which, hopefully, will continue to provide an ongoing dialog between the Journal and the International Society for Educational Planning (ISEP). This theme is classic in planning and encompasses the very divergent opinions on how one proceeds in the study and conduct of planning, i.e., from a normative or from a positive (behavioral) perspective. These articles provide us with a generally normative (that is, how *should* one plan as opposed to how planning *is* carried forward) exploration process in the study of educational planning. There are certainly different opinions within the profession; we look forward to counterpoint!

Davis, in his article "Broad Trend Analysis: Toward Alternate Futures," calls for planners to understand those forces which shape an ultimately unknown future, or at least a future which is only perceived as murky. This article is based heavily on Chapter 14 in the limited edition (100 copies) of *Planning Education for Development Volume I*. We shall be publishing this manuscript in two parts: Part I is included in this issue and Part II will be published in the next issue of *Educational Planning*.

In "An Insight into Planning: Toward a Theory of Transformation," Inbar provides a view into the educational change process from a perspective which includes space, time and causality. His work closes some gaps in planning theory.

Tanner, in "Policy Planning and Analysis: Implications for Research," calls for comprehensive research in policy planning and analysis. He raises a question relative to the potential for blending theory and practice in promoting more lucid decisions.

The Future

The ISEP editorial board has expressed concern that we are receiving few manuscripts from planning practitioners—those who are school-based and those in overseas locations. It is our hope that we can avoid having a publication which is unbalanced—one taking a strictly academic orientation. While *Educational Planning* is a refereed and scholarly journal, we also are interested in practical, school-based planning manuscripts from both U.S. and overseas practitioners. Manuscript guidelines can be found in the Announcements Section. We hope that our membership will respond with articles aimed at a broad range of issues and interests.

Don't forget the annual conference in Kansas City!

PART I BROAD TREND ANALYSIS AND PLANNING: TOWARD ALTERNATE FUTURES

1.0 Introduction

Planners who deal with the near-term and futurists who deal with the distant future have their perspectives shaped by their values and ideology. Here we shall illustrate the issue by examining the values and the analytical framework of a group of scholars and commentators whose social perspectives are variously referred to under the terms "alternate futures," "counter economics," and "limited growth" This otherwise varied group has a central vision of a future of depleted resources, degraded environment, and declining quality of life, unless planners and policy makers escape from a narrow focus on economic growth and view development in a broader ecological framework.

The major theme of this chapter is that present values shape all views of the future by planners and futurists alike. There are a variety of frameworks or perspectives—economic, social, political, and ecological. No one perspective has the depth and comprehensiveness to serve as an exclusive guide for social planning. The future will be shaped by competing economic, political, and physical forces. There are appropriate systems of analysis for studying each of these different kinds of forces which will shape the future, but there is no over-arching system of thought or objective viewpoint for evaluating and judging among competing social forces. The ecological framework has the same lack of depth and comprehensiveness as economic, political, and social frameworks. In all frameworks, population is a central variable.

The task of the social analyst and planner is to identify and understand the forces which will shape the future. These forces will conflict. Planners and social analysts cannot control these future social conflicts. There is no universal system to guide arbitration among conflicting social demands on the future. Conflicting forces that will compete to shape the future are examined in the final section. The forces that are identified and the characterization of these forces and the conflicts among them are shaped by the value of this writer, and this is the theme of the article.

1.1 The Planner and the Futurist

Planning for the future, even for a near future of three to five years, presents theoretical, methodological, and practical difficulties that should worry any sensible analyst. Here we discuss the possibility of using somewhat speculative approaches and methods to track natural, social, economic, and political forces, and to trace out broadly their consequences in the future. We will range beyond the application of trend analysis for trace out broadly their consequences in the future. We will range beyond the application of trend analysis for forecasting the near future in plan documents, and intrude into the domain of the futureists who work with forecast horizons of ten to fifty years.

Our particular interest will center on the work of a group of economists, social commentators, and futurists. Members of this loosely defined group may be called "alternate futurists," "counter economists," and "limits of growth" analysts. They observe

a present condition of depleted resources, a degraded environment, and a declining quality of life. They attribute this to an exclusive preoccupation with economic growth without a broader concern for its ecological consequences. They foresee a future in which the quality of life continues to decline unless economic development policies are less centered on growth and more concerned with the preservation of the environment, the conservation of resources, and the maintenance of quality of life and ecological balance.

The group may also include ecologists, environmentalists, and resource analysts, although natural scientists more often furnish the base arguments for the forecasts of alternate futurists. Included among the counter-economists would be Boulding (1971). The social commentator Henderson (1978) envisions an alternative future. The model builders and forecasters, Forrester (1971) and Meadows (1972), analyze limited growth. The arguments of economists who are skeptical of the older models of growth and development—Schumacher (1973) for example—may be used as a basis for the critique and alternative vision. The work of environmentalists like Murdoch (1971) may also provide a basis for the critique by the alternate futurists. Our interest is not so much centered on the methods of the alternate futurists as it is in their frameworks for structuring the analysis of broad social and physical forces, and for identifying the variables that move within these structures to shape future events and plan outcomes.

It is not the complexity, elegance, or plausibility of the theory and methods of futurists that merit study, but the richness of their insights and intuitions, the creativity of their story line and the attractiveness of their future values when translated into present-value terms.

Futurists do not live by their methods, nor die by their predictions, as these are realized or unrealized through the passage of time. The worth of the futurists lies in the richness of their insights and the attractiveness of their values as these mirror present, not future, concerns and values. The alternate futurists offer a perspective for the future and a framework for planning. As with all future perspectives and planning approaches, the alternate vision of the future is grounded in a set of present values, embodied in a specific set of attitudes and coded into an ideology, which here is defined as a schema for interpreting life. The movement even has a distinctive life-style and morality, but our interest as planners is on the alternate future vision as a framework for planning education.

1.1.0 The Planner's Problem in Studying the Future

The employed planner, who must labor in an imperfect organization confronting the problems of a hectic world, will face a number of practical difficulties that intrude on his study of the future. Planner-analysts deal with the future in a present context of pressure for solution of problems which afflict policy and decision makers. The pressures of current events absorbs time, distract the analyst, and distort his perspective; *but most importantly the pressures of the day force the planner to be concerned with implementation.* Something must be done, even if it is no more than preparing a rationalization of why nothing can be done for the moment. In trying to help decision makers to do something, the planner must cope with individual behavior and the dynamics of organizations and social groups; and in this maelstrom, issues arise that are only moderately amenable to rational methods. The problems of planning and implementation in a real-world and real-time context are dealt with by specialists in the analysis of organizational behavior. McGinn and Warwick (1979) discuss these issues in the El Salvador case. The daily pressures do make it difficult for the planner to climb out of his present rut to search the sky for signs. But the same pressure helps root the search in reality. Pressure is the live part of the planner's job.

1.1.1 Imperfect Systems Structures and Sub-optimization

Pressure and imperfect knowledge may also limit planning analysis to dealing with only a sub-set of the issues and variables that characterize the problems. In some cases the planner cannot identify the full set of variables, or measure their values, or establish the range of their values; in other cases, the planner may identify the variables but be unable to control or influence them; and in the worst case, the planner may be unable to develop a framework for identifying and structuring variables which seem to be important and related. In these situations planning at best becomes an exercise in sub-optimization, where some goals may be attained, while other equally important goals are not addressed. Or the likelihood of attaining one goal may actually be diminished by the pursuit of another.

Sub-optimization is easy to criticize and deserves the criticism Henderson and the counter-economists (1978) muster against it, but behind the brilliance of the critique there still is only rudimentary development of an optional framework and perspective for rising above sub-optimization in situations where the goals of social groups are dimly perceived as conflicting. Whether the game is ultimately zero-sum does not matter so much as whether or not it is perceived as such by players in the short run. No person sits still for the unfolding of the future when the planner cannot demonstrate to the person that the future will be better (or worse) for him/her. Alternate futurists can only put up the signs and hope, and when the future signs indicate a growing scarcity of resources and a plundered and degraded earth, as in the limits of growth forecasts (Meadows 1972), then conservation is one possible reaction, but hoarding is another. Invention, innovation, and sacrifice are possibilities, but perhaps not the most likely outcomes.

Assessing the human future within the framework of ecological systems analysis—in Boulding's terms (1971) assessing the "goods and the bads," the "services and disservices" for everyone, everywhere and for all times—requires less emphasis on criticism and catch words, and more elaboration and application of analysis to social reality. The environmentalist message must be internalized by the massed poor who have not yet had the opportunity to get their licks in against the ecosystem. The alternate futurists, if their message is to be heeded and practically addressed, may have to deal more straightforwardly with individual and societal obtuseness and perversity, when they are much more comfortable in a utopia of participation and permissiveness. At best the world would have to be more as Mannheim (1949) envisaged it, where the views of the intellectual elite are made to matter through social guidance; and at worst there will have to be ecological salvation through power and coercion and regulatory enforcement. Liberals among the alternate futurists may hope that the enforcement apparatus will wither away, but regulation and enforcement may increase in the beginning.

So far, even the framework for encompassing and organizing ecological knowledge and awareness has not been worked through. To an even less degree is there a model for analyzing, understanding, and mediating competing social views, or methods for planning policy and programmatic responses to ecological problems that affect members of societies in opposite ways. We will expand on this unsupported assertion later.

The planning methods based on the application of the systematic forecasting techniques—cohort and time series analyses, and extrapolation and projection based on trend analysis and curve fitting—exemplify the problem of sub-optimization when planners must translate the broad goals for social systems into the narrow statements of objective functions. The result is the limited and sometimes purblind allocations frameworks within which development planners work. No sweeping solutions emerge, and limitations in the models and methods invite the criticisms that Boulding (1968) and

others have advanced. The alternative visions go beyond mere criticism. Alternative systems and forecasting frameworks are outlined in the work of Duncan (1969) and Forrester (1971), and, like all systems, they have limitations. Just as rational planning may be of limited use in developing a framework for addressing goals in the broadest and most optimal way, alternative approaches may be limited in the depth of their analysis of the dynamics of complex social systems. If sub-optimization is the better-than-nothing alternative for developing a comprehensive framework and goal statement, black-boxing is the response to the difficulty of penetrating and understanding opaque social contexts and phenomena.

1.2 Black-Box Models in Natural and Social Systems

Many of the systematic analyses which support the planning of economic systems, and the planning of ecosystems as well, are limited to black-box portrayals of the sociopsychological dynamics that underlie the process being modeled. This is true for the portrayals of the dynamics of a national economy modeled in the aggregate, the analysis of population dynamics, and the forecast of population growth. In educational planning it appears even more clearly in the forecasting of enrollment flows and systems throughput, and in education production function analysis, in which the central process of an education system, the myriad acts and reactions in teaching-learning, are summarized by a few numbers or analyzed as an input-output process with the limited models of regression and least-squares.

The observation, much favored by Henderson (1978), that a system cannot be managed if it cannot be modeled is attractive in a wistful way, but may be impossible of fulfillment, because no social system and few physical ones can be satisfactorily modeled; and yet within limits they must be managed. A central concern of analysts of both social and natural systems is population dynamics, but modeling the simplest dynamics of human population change is far from adequate. The population projections of the U.S. Bureau of Census are just that, projections. They are not forecasts, or even predictions, simply because many variables which affect population growth cannot even be identified, much less analyzed and predicted.

The United States census projections depend on sets of assumptions about changes in the major components of mortality, fertility, and migration without any precise attempt to model the variables which affect these components. Apropos of the analysis of ecosystems, Murdoch (1971) discusses the modeling of less complex and more easily observed populations: "The great proportion of the problems we face in managing ecosystems are population problems . . . The famous cyclic populations of small mammals have been studied for 40 years, and still there are several theories competing to explain the data." Discussing the population dynamics of the spruce bud worm (caterpillar), Murdoch states, "After 15 years of study the major causes of mortality have been found for most of the life stages in the insect, but after this enormous effort, it is still not known what normally limits their numbers . . ."

If those who work in the analysis of ecosystems are this modest about the limitations of their work, it behooves analysts and planners when structuring the analysis of human social systems to be wary of expecting ecology to afford a new framework for social planning. Murdoch states, "In the case of real ecological systems one does not try to describe every interaction and the relationships among all the variables . . . Indeed, the art, as in any science, is to draw a caricature of the system, etching in the really crucial lines . . ." This may have a familiar ring and resonance for social analysts.

It may be comforting to analysts and planners who deal with human social systems that

their colleagues engaged in analyzing physical and natural systems are forced into the same black-box approaches when dealing with the reality of their world.

The planner-analyst does the best he can when attempting to deal with the human social systems he must deal with, and there is no methodological salvation offered by ecological systems analysis. This should not suggest that those who criticize development economists and planners for being insensitive to ecological perspectives and frameworks are not correct in their concerns.

Here we will examine some of the broad forces that planners must track into an unknowable and intractable future, and many of these economic, social, and educational currents are bound into, or bounded by, physical and ecological variables and systems. The social planner must be aware of the potential future effects of energy and mineral resources, the effects of climate, the potential limits of food supply from land and water resources, and the limits of fresh water itself. Population growth and environmental degradation will affect economic growth and the quality of life; and, in turn, the quality of life will have effects on population dynamics and social and cultural development. It will be no easier for the planner to analyze relevant physical variables within an ecological framework than it is to deal with the limited economic and social variables that planners have traditionally attempted to analyze. Modeling the internal dynamics of complex natural systems is not markedly simpler than modeling social systems. The analyst will still make do with general variables, incomplete specification, systems caricature, and black-box analysis.

1.3.0 Knowing About the Future Versus Dealing With It

It is difficult to foresee the future, it is even more difficult to do anything about it; and yet presumably this is the purpose of planning when applied to tracing forces, events, and future consequences. The planner must deal with the future on the basis of present and past data and a set of methodologies that are limited when used for projecting, forecasting, or predicting the future. Even when planners are sufficiently skilled or lucky enough to glimpse something of the future, they are faulted because their plans, and the policies and programs they engender, cannot actually do much about the future.

Both critics and supporters may have expected more of rational planning than the approach could deliver. The warranty for this assertion will be advanced in this discussion, which examines the extent to which planners are able to analyze the interplay of important natural and man-made forces, to trace out their consequences in terms of social, economic and political trends, to incorporate this analysis into forecasts of probable future states of social systems, and to develop plans, policies, and programs that are relevant to those future states.

1.3.1 Planning and Doing

At the outset it will be stated that even the most accurate analysis and forecast may not lead to plans, policies, and programs that do anything about the future conditions traced.

In the process of planning, the foresight that informs plans, policies, and programs operates in three different modes according to context. The expectations of the outcome of planning should be scaled accordingly. First, there are the prudence and foresight that support planning in the managerial context, when the domain is small, the time horizon is short, and the control of assets, in the form of both material resources and social support, is strong. Here there may be a reasonable expectation that analysis and planning can influence future events in the short term.

Secondly, there is the foresight that is guided by analysis of a process embedded in a complex social surrounding. In this context not only is the control of assets weak, but also the process under study may only be caricatured through limited models and black box analysis. Hence, foresight may not hold true over any extensive domain of different circumstances or over any period of time; and the influence of policies on future events will be correspondingly weak.

Lastly, there is foresight based on the study of broad forces operating in a complex context, with consequences likely to influence events over a long-time horizon. The planners's purpose may be no more than to trace these forces in lineament. Analysis in this context may indeed increase present knowledge, but this knowledge may not be translated into policy and program instruments that will affect future events.

When it comes down to tracking broad forces and their probable effects, it is hard to analyze all the forces that impinge. The major ones may be difficult to identify or analyze in order to array the anticipated concatenation of events in the form of a prediction. It may be even more difficult to do anything to affect the outcome, even if it can be glimpsed. Most major social variables, which are driven by major individual choices, are not under control in the present, much less in the future. If present preferences cannot be added and expressed to the satisfaction of all, then choices projected into a future. If present preferences cannot be added and expressed to the satisfaction of all, then choices projected into a future in which the chooser cannot even know his own status, will be even less easily summed and expressed in a tractable objective function. *The objective function is a statement which relates goals, or objectives, to outcome levels as these are assessed by predetermined criteria and criteria levels.* The objective function shows the extent to which we accomplish what we set out to accomplish within the system as we define and model it. Yet, though it may be impossible to know the future, and useless to try to control it, generally it is considered prudent to give thought to the future; and some ways of thinking about the future are more productive than others. At issue is whether it is productive to think about the future, whether or not anything can be done about changing it.

1.4.0 Assessing the Quality of Thought About the Future

The planning literature, both the segment which deals with the near future and the segment which deals with the broader field of futurology, provides little guidance for developing criteria to evaluate the quality of thought about the future. In conventional appraisals the position seems to be that thought about the future has demonstrated its worth, or its uselessness, when things come out, or fail to come out, as foretold. This seems a limited standard by which to judge matters. It would seem that the value of thought about the future is best demonstrated by its relevance to both the present and the future. In terms of the present, thought about the future is productive when

- It clarifies thinking about present problems;
- It encourages confronting present problems;
- It aids in resolving present problems.

If thoughts about the future contributed only this much, it would pay its way, but it is also common to assess the productivity of "futures thought" in the light of future events:

- Good and bad future events come out as a foretold, without intervention, i.e. the forecast is fulfilled for better or worse. The forecast is accurate.
- Bad events are avoided because of intervention prompted by thought about the future. The forecast is effective.

- Good events are brought about because of intervention prompted by thought about the future. The forecast is constructive.

In tracing broad forces and their probable future consequences, it is rarely possible to prove the effectiveness and constructiveness of thought about the future, although it is possible to assess accuracy.

1.4.1 The Usefulness of the Alternative Vision of the Future

Alternate futures of reduced waste, through cutting away unnecessary consumption and husbanding diminishing resources, enhanced quality of life, through closer attention to ecological balance and environmental quality, and economic development, founded on self-actualizing models of production and equitable distribution, have all been conceptualized by Boulding (1968) and Schumacher (1973), and expounded and diffused by Henderson (1978). By the criteria proposed above, the work of the alternate futurists may be useful, whether or not future depletion of resources and degradation of the environment and reduced quality of life come to pass, or are avoided by changed policy and timely intervention. The preaching of the message is serving to clarify thinking about present problems; it is stimulating policy makers to confront these problems, and in a certain measure to resolve them; and, if not, at least to ameliorate or defer their consequences.

In the future, and especially in the near future for which the planner plans, some good and bad things he foresees will come to pass as he foresees them, and without policy intervention. Thus, his present thought on the future will prove accurate. Some of the bad outcomes will be avoided, and some of the good alternatives will be attained because of policy intervention, and thus thought about the future will turn out to be effective and constructive. The more probable consequence is a mixed result, rather than a perfect record; but even if there is no avoidance of bad or attainment of good, the future thought may serve to improve the present.

In the best of worlds the futures forecast would serve to alert constituencies and policy makers to take action to avoid future harmful consequences. The futurist and planner have served nonetheless when they have accurately charted broad currents of the future, even if no decisions and actions are based on the forecasts. Long before the views of the ecologists and alternate futures groups came into prominence, some energy specialists and some policy planners were asserting that petroleum resources were being depleted and future shortages would occur. Special studies, including one by a special presidential commission, predicted the United States energy crisis of the 1970s, twenty-five years before it happened, but no policies were developed or programs implemented until an emergency shortage forced Americans finally to realize that petroleum was a finite resource. Though the many forecasts of resource depletion did not prevent waste and promote conservation policies, the projections, and the continuing studies and reports of United States Geological Survey bulletins, were useful as a pre-vision of future problems. The studies provided a base for later policy analysis. *The point is that planning and forecasting serve a purpose whether or not policies and programs are developed to respond to the future states that are traced out.*

2.1 Systems Frameworks for Analyzing the Future and Planning

To analyze the broad forces that will shape the future, the planner requires:

- a systems structure or context to guide analysis;
- a means for identifying and assessing the status and change in major variables within the analytic framework;

- a set of methods for analyzing the variables and portraying the changes in them over time;
- and a policy context to shape inferences from analysis.

Clearly the planner works within a framework of his own individual and culturally determined knowledge, skills, attitudes, and values. These values not only orient the policy choices, they also guide election of a systems structure in addition to identification and characterization of specific variables. Arguments about culture-free, value-neutral, or objective frameworks or paradigms for analyzing social, or even physical systems, are made of straw, for even the choice of the basic analytic framework is value-founded and subjective. Much less are variables selected and characterized objectively; and to claim objectivity in the formulation of policy conclusions drawn from social analysis is preposterous. An argument might be made as to whether one framework and analysis mode is more objective than another but it cannot be resolved or even reasonably argued except within one or another framework of values.

2.2 Natural or Ecological Systems Framework

Natural or ecological systems models provide one framework for structuring analysis of the broad natural forces which will shape the future. The ecological framework with its tang of naturalness may suggest that it is the most basic and objective framework for analyzing social as well as natural systems; but it is neither more objective nor more basic than any other, as the arguments over environmentalist issues reveal. Still, the argument for structuring analysis within the broadest natural or ecological framework is persuasive, for if the environment is degraded, resources depleted, and food and energy wasted away, all man's social works and ways will come to naught.

As a framework for analyzing the future of mankind, even the ecological model is not wholly sufficient. First, there is no framework for tracing ecological consequences comprehensively; secondly, there is no framework for tracing consequences in depth. The masked model and black box are just as ubiquitous in the analysis of natural systems. Environmental exploitation and its consequences influence, and are influenced by, the political, cultural, and economic thoughts and deeds of human social behavior. These influences must be analyzed in detailed fashion within other systems frameworks and with other paradigms. Still, the ecological framework may provide the outer structure within which social systems are analyzed.

As Murdoch (1971) has explained, there is no serviceable model that spans the major ecological systems of the earth, or even a model that delineates in any complete way the ecology of limited field environments, or the dynamics of natural populations. When ecologists, environmentalists, and counter-economists advocate an ecological framework for analysis, they are not suggesting that a full-fledged model is available for the analysis, but merely that an ecological framework provides guidance for avoiding the restricted views imposed by economic or political systems frameworks. The tracing of future consequences must be broadened from the limited perspectives provided within economic and political frameworks in order to include wider effects in the surrounding environment. The ecological systems context provides this framework, but it does not provide an all-purpose method for probing inside all economic, cultural, and political systems problems, or for tracing their consequences into the future.

2.3 Social Systems Frameworks

Economics does provide a framework or systems structure for tracing broad consequences of interest to planners. Despite criticisms of its limitations, the paradigms

of neoclassical economics enable the analyst and planner to deal with an important class of societal variables. Decisions reached within a framework of economic systems analysis, as Henderson (1978) claims, may be sub-optimal, but the same limitation may be true of perspectives supplied by any framework. The environmental consequences of economic development may be identically destructive and wasteful whether worked out under neoclassical economics and private profits structures or under Marxist theory and state structures. An ecological framework might treat the two as indistinguishable, but a political economic framework would distinguish between the two.

Planners working within the framework of either one of the two economic systems must still deal with differences that are meaningful to the policy and decision-makers served by the analysis. Under one system a market of buyers and sellers is assumed as fundamental, while participants, who can, do their best to destroy its untrammelled operation in the future; under the other system, a cooperative of producers and consumers is assumed to be fundamental, and participants with privileges do their best to escape it. The way in which these conflicts are worked out differently in their respective systems is of considerable interest and importance for planners attempting to track the future of their political and economical systems. Analysts with a broad ecological perspective may find the political and economic differences of minor significance, but analysts within the different systems must deal with the future using appropriately different social modes of the economic and political systems.

2.4 Political Systems Frameworks

Political systems frameworks provide planners with a basis and a structure for tracing the future dynamics of power, control, and compliance. In this paper we will not dwell on political forces and structures as they are manifested in the organization of government bureaucracies and administrative machinery. Centralized and bureaucratic control and administration, as contrasted with decentralized administration and local participation, influence the substantive and formal character of planning and future thought. The transactional context in which plans are formulated and implemented and the different systems and administrative structures will condition the way analysts and planners work out the future. Our interest here, however, is in the analysis of broad social currents and political forces that influence the future.

Again from the ecological perspective, particular configurations of power and control may be of little significance if the future brings a world of environmental chaos; but the ecological future will be shaped by differences in political forces and dynamics. Depleted resources and environmental degradation are the consequence of greed and power operating in a context of social and political ignorance or indifference, and only through the exercise of countervailing power and control over this will be resolved. Etzioni (1968) defines power as the capacity to overcome resistance, to introduce changes in the face of opposition, and to draw on and energize assets. In few systems is power absolute and coercive, nor is control complete. Hence, the effective exercise of control depends on the social structuring of compliance. In Etzioni's scheme, power applied in the system may be coercive when it attempts to gain compliance through force of sanctions; remunerative when it attempts to secure compliance through material rewards; or normative, when it aims to evoke moral compliance through the symbols of esteem.

Different forms of power evoke different forms of involvement, commitment, and compliance, but to attain any set of ecological or economic goals will require organizing political forces for the broadest form of social action. Depleted resources or degraded environments result from the sum total of individual and group values and actions, and

only organized political efforts to change values and actions can reverse the damage. The alternate futurists prefer that this be accomplished by promoting the internalization of changed attitudes in millions of individuals, through education and information circulated through participant networks. They prefer the exercise of normative power leading to compliance through moral involvement. However, if the pressure for changing the course of the world is as exigent as portrayed, and the state of ignorance, outside of a few islands of affluence, as vast as it seems, time may run out on the preferred alternative, and the future may require direct application of coercive power and control. The alternate futurist may be forced to choose whether the social or the natural environment is to be polluted.

The author once observed a young man trying to promote change, through education and tribal cooperation, in the environmentally harmful slash-and-burn agriculture practiced by mountain tribesmen in Southeast Asia. An alternative approach to the same policy was also enforced by punishment at gunpoint meted out by area police. Assessment of the results of the two approaches did not wholly support the view that Etzioni's alternative of normative power, and moral involvement will be the way of the future. Coercion sometimes changes practices when moral persuasion does not.

The value preference of those who advocate an alternative future of ecological harmony and environmental quality is for normative power evoking a moral response through participation, shared concern, and internalization of political and economic goals that do not harm the environment. This is the only one possible power/compliance configuration. Whatever the form of power exercised or compliance attained, the planner must deal with political systems and the key variables that operate within them. Ecological harmony may have to be attained through the exercise of coercive power. The planner cannot assume that harmony will come through the exercise of normative power and social participation.

Murdoch (1971) speaks to the point of ecological harmony and social disharmony. He points out that it is the sum of individual decisions which leads to unchecked economic growth, and the consequences of this which degrade the environment. He states, "the problem is quite simple: Whatever the collective good may require, it is almost always to the individual's benefit to increase his personal wealth." It is also this avid individual who in the natural order of things increases and multiplies his kind. Apropos of "genetic altruism" he states, "Thus natural selection, by definition, ensures that those genotypes survive and increase that produce more reproductive offspring than do competing genotypes" (Murdoch 1971, p. 427).

The ecologist's case-of-cases on man's exploitative potential is Hardin's (1968) "tragedy of the commons." Each shepherd added sheep to graze on the common land, because it was in his short-term interest to add to marginal over-grazing, even if in the long run the common resource was destroyed. Future problems which may require resolution through power and even coercion are not all founded on lack of knowledge, as in the tribal slash and burn example, or on individual profit motives, as in the "common's" case. Very often two highly valued rights and goods clash. An example is the development of solar energy in the Northeast, which was reported (*Boston Globe* 12 July 1975) to be slowed by unrealistic warranty standards imposed on equipment makers in a new field to protect consumers. Subsidies to encourage homeowners to invest in solar energy actually encouraged them to wait for more subsidies. The environmental good, solar energy, clashed with the social good, consumer protection. The good does not simply clash with the bad; the good conflicts with the good. In the future these conflicts may become even

more tortured than the present ones that environmentalists have learned to handle: environmental protection versus jobs for workers, cheaper power, or economic growth.

Ecological damage, vastly increased in potential danger for all, because of more effectively destructive technology, must be approached by the planner as a future problem which can perhaps most clearly be appreciated from an ecological perspective. The framework of the ecologists provides a basis for analysis. On the other hand, there are social, political, and economic dimensions of the problem best analyzed by the models and methods appropriate to these fields. The structure for analyzing the problem and synthesizing a solution through policies and programs is not provided by ecology. Resolution, if it is to be effected, must come through social systems analysis, and economic, political, and social policies and programs. There is a question as to whether the alternate futures forecasters are shying away from possible—some might think likely—political alternatives, preservation of the environment and its resources through social control and, where necessary, implemented through political coercion. This is by no means an unlikely response if the survival of large groups, or even the species, is perceived as endangered in the future.

One shudders to think what political powers could, or would do, in the name of world survival, when so much destruction has been wrought in the name of mere national survival. There was a trace of power and coercion, the domestic big stick, to the efforts of one of America's more effective conservationists, Theodore Roosevelt, as this in the days when the issue was more one of aesthetics and recreation than survival.

A future in which the issue is the survival of the human species is not often raised even by the most fervid ecologists. Wheeler accuses some ecologists and environmentalists and alternate future advocates of proposing mere tinkering when the issue is much more serious. He states, "But it is time, past time, that we looked up to confront full-face the long-term prospects of our survival as a species . . . Our survival is by no means assured . . ." (Wheeler, 1978, p. 32).

Charles Sanders Peirce (1923) examined the alternative of individual immortality long ago, and after finding it unappetizing, concluded—and it is possible to read a sense of relief into his final words—"In place of this we have death." This may also be an alternative for mankind, though few planners or futurists have been bold enough to face it. Their faith is still rooted in social controls of a more benign form. Mannheim (1949) advocates this form of societal control through planning. His words have relevance to a future where the natural environment must be preserved without destroying the political and social systems many of us now value.

2.5 Social Systems Frameworks: Mannheim's Conception

For Mannheim (1949), planning requires the analysis of the conflicts between competing social forces. The conflicts arise from different values which create opposing goals and social perspectives. His theories could apply to a potential conflict between goals for the natural systems and goals for social systems, although in Mannheim's hour the world seemed more likely to perish by catastrophe in the social and political system than through decline in the natural environment. Mannheim viewed planning as future-oriented: planning was for him foresight deliberately applied to human affairs, so that the social process was no longer the chance product of conflict and competition. Mannheim did not quibble about the limitations of rational thought as applied to human social affairs through planning. Planned thought was the highest stage of rational development, and for him rationality was concerned with synthesis as an end beyond analysis. The planner searched through factors to arrive at regularities and formulate

them as principles. Mannheim did not charge planning with the responsibility of guaranteeing success in controlling whatever future might be foreseen. There was, for him, no option to planning; it was an inescapable task. Planning analysis had to deal with reality and its interdependent problems. It was not purely a theoretical exercise, but was concerned with influencing social control, even when that implied the existence of power, control, and coercion in social and political systems. The moral objective of planning was to preserve and enhance freedom, subject to democratic control.

Mannheim, more clearly than others, perceived the importance of planning's attempt to identify the broad forces that shaped present and future social systems. The prime task was to describe these forces, called Principia Media, after terminology in Mill's *System of Logic*. The Principia Media were the regularities sought in the rational exercise of planning. They were interconnections that defined the particular character of a social pattern; they were universal forces in a concrete setting, the basis for viewing present reality; but because they were regularly recurring special laws, they could be used for tracking the future. Planning was a predictive strategy which attempted to bring under control the as yet uncoordinated Principia Media of the social process. The quest for the planner was the discovery of these Principia Media, which in combination were the forces which dominated a social epoch. The task was not to discover them post-mortem through history, which assumed that what happened was the most important or only possible play of forces that could have happened. Inquiry into the current play of social forces was required.

For Mannheim the planner's task was to investigate and identify Principia Media as they emerged, in *statu nascendi*, and to describe them as multiple possibilities, not as single predictions. He faulted futurists, as he faulted historians, because in the "prophetic error," futurists described what will happen from a welter of possibilities, selecting according to their own wishes. Planning for Mannheim was social vigilance, an attitude of watching over the factors at work in a society in order to detect new possibilities which were coming to the surface at the proper moment. The purpose of monitoring society, of the ceaseless inquiry and research into social dynamics, was to reinforce those possibilities which had been identified at those points where vital decisions had to be made. The planner sought knowledge of broad forces in order to shape decisions and social action. His task was not "establishing" social institutions, which Mannheim equated with "colonizing"; nor was the planner's work mere administration. "Administering" came after the Principia Media had emerged and the forces had been charted, brought under control, and stabilized.

Mannheim described the process of inquiry into the Principia Media as proceeding through exact description, comparison, causal explanation, the search for regularities, and the formalization of principles. He gave examples of planning for key social objectives: full employment, social security, economic and educational opportunity, world order, and peace. Yet for Mannheim the centerpiece and safeguard of all social development was the formation of the "democratic personality." The purpose of planning was always freedom. Freedom was to be insured through the constitution of "the democratic personality." This was to be accomplished through education broadly conceived.

Through education and communication the society was informed and guided, and intellectual elites, the personalities of high social disinterest, emerged to identify the Principia Media to guide social planning. Perhaps Mannheim in his day was foreseeing elites of the alternate futures and ecology groups who have identified the Principia Media of this era as the conflict between the finite resources of the earth and the profligacy of

man's use of these resources. From this conflict a host of physical, economic, political, and social consequences will follow in the future. Mannheim would recognize the legitimacy of elites identifying and communicating their Principia Media, but he would be less likely to understand the discomfort some of these elites express about their own elite status. This may be yet another Principia Media—the emergence of a social conscience so tortured and refined that it shrinks from contemplation of undemocratic means for social preservation. Mannheim might have understood this dilemma. He struggled to accommodate his idea of the necessity of planning and social guidance with his idea of the primacy of unlimited freedom.

Mannheim never gives clear examples of Principia Media for his time and place. One might infer that they included: the conflict between the mobilized powers of totalitarian systems and the latent power of democratic states; the intrusive and expansive outreach of technology; urbanization, and social complexity; the aging of industrialization; the power of mass communication over public opinion; the rise of mass education; the breakdown of moral and religious authority; and the loss of philosophical coherence.

The concerns of the environmentalist, ecologist, and alternate futurists would not have been central for Mannheim. Concerns about environmental degradation, ecological damage resulting from population growth, technology and resource depletion, did not appear as Principia Media for him. But his basic concept of Principia Media, and his objective of harmonizing social guidance and freedom, would have provided a framework for addressing such problems.

Ecological, economic, political, and social perspectives provide the futurist and planner with a variety of systematic frameworks for analyzing the broad forces, or Principia Media, that will affect the future. Within these frameworks analysts can identify the key variables that indicate the emerging Principia Media that presage the future. We will examine some of these key variables.

To be continued in next issue.

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AN INSIGHT INTO PLANNING: TOWARD A THEORY OF TRANSFORMATION

"Chronology disguises a strictly logical order of deducibility"

(Sartre, 1964, p. 100)

"All known structures are, without exception, systems of transformation"

(Piaget, 1971, p. 11)

Dror's (1966) definition of planning, followed by Anderson and Bowman (1964) and Adams and Bjock (1969) who elaborated it to education, emphasized planning as a "process of preparing a set of decisions for the future action pertaining to education." Indeed, planning is defined in many ways, each emphasizing different aspects, approaches or roles. Rather than summarize again all or most of these definitions, as has been done extensively elsewhere (Lynch and Tason, 1984), a different approach will be pursued here. The focus will be on revealing the planning "process" itself. Elsewhere (Inbar, 1976) we viewed planning as a part of a process of communication, a message stating the process of change and plans as the message's formal utterance. From this viewpoint the process of perception can be seen as an essential intermediary process between planning as a message for change and change itself, i.e., the decision to accept the plan and to implement it.

The starting argument is that planning as a process and plans as its explicit and formalized outcome are both engaged in a continuous act of developing a *planning frame of reference*. Planning can be viewed as a process which reshapes existing frames of reference or develops new ones, in light of the understanding that a frame of reference is a connected set of "facts," "axioms" in reference to which one perceives problems, defines situations, compares alternatives, makes decisions and communicates thoughts and attitudes.

Changes in the frame of reference will imply changes in perception and changes in contextual meaning. What does it mean to change a frame of reference? What are the dimensions of a frame of reference? How do changes in certain dimensions affect the change in the frame of reference and, consequently, how do these changes relate to the transfer of contextual meaning? The argument is that problems are perceptually bounded. The definition of a problem is mainly a matter of perception. Perception itself is derived from a certain frame of reference. Decision-making, choice, evaluation, setting of priorities, and essentially any other cognitive process can be better understood in terms of a frame of reference. Political struggle, tension, and shifting of power make better sense in relation to a certain frame of reference. Since it is assumed here that planning is an intentional process which might reshape a frame of reference or might establish a new one, it makes planning potentially a most powerful cognitive and social process. Indeed, we are dealing here with the cognitive meaning of planning. The understanding of the process in which planning reshapes a frame of reference thus turns out to be essential.

The Planning Frame of Reference

A frame of reference is an articulated whole consisting of interdependent dimensions. The dimensions are interlocked in a configurative way; thus each one is a member of the whole and its full meaning is characterized by the whole. But a frame of reference will possess characteristics not to be directly discovered by separate examination of its parts; in interaction the dimensions will take on meanings not inherent in their separate compositions.

Now, by changing the dimensions, all or part of them, the frame is changed, which means that perception is changed and different references can be made. We will refer to this process of changing a frame of reference as a process of transformation, i.e., a process in which one or more dimensions are changed in such a way that the frame of reference is changed. It is clear that frames of reference are relative to man's society and culture, since any frame is relative to its bounding dimensions. The question is what are some of the basic dimensions contained in a frame of reference, and how do these dimensions influence, singly or interactively, a frame of reference?

Three basic dimensions are identified here: *time*, *space* and *causality*. All of man's thinking involves a process of dividing perceptions, feelings, and responses, and storing them into categories in a web of time and space. Without going deeper into the Kantian categories of the temporal and the spatial, these become the basic tools with which to deal with perception and transformation of frames of reference. Practically, time and space could be enough to recognize movement and change. However, since our main concern is planning, a conscious and deliberate process of change, understanding the meaning of change, its mechanisms and its possible outcomes imposes causality as the third dimension. Similarly, since causality can be viewed as a perceptual characteristic of planning, it is possible to base the planning frame of reference mainly on it. However, in considering the risk of overlapping, it seems that each of the three dimensions makes its unique contribution to the understanding of the planning frame of reference, and by employing all three a better insight will be obtained.

Let us now proceed in the following steps: First, elaborating each dimension; second, developing a combined analysis of all dimensions; and third, suggesting some basic transformative characteristics which will in fact exemplify and focus on planning as a vehicle for transformation.

Time

Any perception is bounded by time, and the image of time is inherent in any perception (Polak, 1973). For our purposes we will emphasize mainly the latter. Let us first distinguish between two perspectives of time, the diachronic and the synchronic. In a *diachronic* perception of time the longitudinal aspects are emphasized. The issue is held constant and time is changed. We perceive the same issue through time. These time durations can, of course be long or short; they might be decided according to the inherent change cycle of the issue concerned, or be arbitrarily decided upon from political, practical, or economic reasons. For instance, a three-year plan of vineyard development is based on the inherent time cycle needed for a vine to yield grapes. However, a five-year transportation plan is more a matter of political preference and economic restrictions.

The second time perspective is *synchronic*. Here, time is held constant and the context is changed. In the diachronic perspective the questions will tend to focus on few variables, perceiving them during time. For example, how has the teacher body changed in the last twenty-five years? In the synchronic perception, the question will tend to combine many variables, interrelated in a defined span of time. What are the interrelationships among

the social, psychological, political and economic variables which affect the teacher body today? Diachronic perception will tend to be related to change, where the synchronic will tend to relate to interactions.

Space

Complementary to time, any perception is bounded by a certain space and space is inherent in any perception, though we will largely emphasize the latter. Space can be characterized contextually by two main domains: *physical* space and *social* space. Although for all practical purposes the two aspects are highly interrelated, a distinction might clarify the space dimension. The physical domain of space mainly concentrates on objects such as school buildings, with physical boundaries, organizations, localities territories, or even countries. Social space orientation focuses itself on the people, such as individuals or groups. These plans will mainly be devoted to the human aspects, such as manpower development, leadership, or student learning. Organizational climate, a nation's culture, or achievement in a certain school are examples of interactions between the two domains. Space can be perceived through two main perspectives—the *vertical* and the *horizontal*. Obviously, space consists of three dimensions, including depth. But our emphasis here is on the way space is “sliced”, holding depth constant, for the time being. The question of how “deep” is one looking into the planning space, and to what degree planning is not retained in the surface structure, are those which distinguish between taxonomic and transformative approaches of planning (Inbar, 1976). The vertical perception focuses on a spatial unit, looking at all the echelons of its hierarchy; in other words, perceiving all its different sub-systems. This can be done in a whole educational system, a whole organization, or a whole country. The vertical boundaries of the perceived system are a matter of definition. We are dealing here with a vertical slice of the system.

The horizontal perspective focuses on similar sub-systems across various systems, for instance, all tenth grade classes of the educational system, or all teachers of mathematics in the secondary schools in a country. Here we have a horizontal slice of the system.

Causality

Knowledge of possible consequences, of cause-effect relationships, is a major dimension in any frame of reference and a major underlying assumption in planning particularly (Wildavsky, 1973). Any planning exercise implies some type of causality; the very basic idea of planning is based on the assumption that doing something in time A will probably result in anticipated outcomes in time B. The difference will be in the causal types and probability (Dahl, 1965).

In order to systemize the discussion, let us now consider three elements through which different types of causality can be distinguished. All three elements should be perceived as a continuum. The first continuum is based on the distinction between a *deterministic* approach and a *probabilistic* approach, when, on the one end, doing A *must* and will lead to B, on the other end, doing A *might* bring about B in various degrees of probabilities. As important as this element is, it is rare that planning processes disclose the probability assumptions they are based on. It is almost a convention that social space plans are based on a probability orientation, but the plan itself implies rather a deterministic approach.

The second element of causality refers to the question of the number of participants, variables or factors taking place either at the cause or the effect end of the continuum. Practically we can distinguish between a single factor and multiple factors. The two extremes will thus be on the one end, a single cause factor associated with a single effect

factor, and at the other end, multiple cause factors associated with multiple effect factors. In between are different variations, single cause with multiple effects, multiple causes with a single effect and, of course, variations in the number of the factors.

The third element is based on the distinction between a *one-way* relationship and a *two-way* relationship, i.e., between non-interactive and interactive relationships. In the first case, there is no assumption that the effect B will have any return effect on cause A. The second case clearly assumes it. For instance, the type of student clearly affects the level of school achievements, and these achievements will affect the type of student enrolling in the future.

The combination of the three elements of causality might configure into various causal perceptions. The two extreme cases are: first, a single factor is perceived to have a *one-way* determined effect on a single result, for example, the old, quite naive, assumption that student desegregation will result in the increase in disadvantaged students' achievements. The second extreme consists of the combination of multiple factors which might, in certain levels of productivity, have multiple outcomes, which themselves will probably affect the cause factors. In other words, we are perceiving associations without clear causal implications between two sets of factors. In using the same example, it means that desegregation, with high teacher motivation, new curriculum and special teaching methods might have certain impact on student achievement, which in turn might affect teacher motivation to develop new teaching methods. In between, various relationships can be observed as the combination of a single cause factor, relating in a one-way probability effect on multiple outcome factors. This is the case when planning focuses on one major factor, such as the introduction of a new school principal with the hope of changing the whole school course of action.

To sum up the description of the various dimensions and elements, a frame of reference is a unique contextual configuration, a map consisting of the time dimension, the space dimension and a certain causality perspective, when time as well as space might be conceived with variations—chromatic or synchronic, vertical or horizontal, respectively. Furthermore, and this is one of the main arguments, such differences in time, space and causality will develop different frames of reference in similar contextual situations which will yield different perceptions of events, problems and phenomena. We can now redefine planning as a process of constructing maps of time, space and causality in new settings.

Changes in the Time Dimension

Within a single frame, perhaps the most important dimension in carrying out a planning process is how we assign time to events. The answer we give in practice is controlled almost entirely by considerations of convenience. But the time on which orientation planning is based will have direct bearing on the way space is perceived and causality is treated. Let us discuss some of the time change implications.

One of the essential properties of time is its directionality. From this feature it derives that time is a basic dimension of the causal chain upon which the whole process of planning is based. By relating a chain of events to time, one tends to generalize the property of directionality and often to jump to premature conclusions of causality. In other words, the diachronic perspective of time leads us to a stronger emphasis of causality, often to an illusion of causality.

However, most complex plans, such as in education, are based on both orientations of time, the diachronic and the synchronic. By a synchronic perspective we mean two or more events which are indeterminate as to their time order, for example, simultaneous

events. The interdependence of events at one corresponding point of time cannot be interpreted as ordinary causality. They might, of course, be the effect of a common cause, but among them causality cannot be assumed. Simultaneity means the exclusion of ordinary causal connection. But, since the time intervals which are the basis of our synchronized perspective—minutes, days, or even years—are in many cases arbitrary, simultaneity may be more arbitrary than inherent. Furthermore, in many cases if we assume that things happened simultaneously, we design the proper time intervals to support such assumptions. Consequently, the question of the time interval in a synchronized time perception becomes crucial. This implies that in many cases causality is not a matter of knowledge but of definition.

This leads us to two other important questions of time: the time boundaries of the plan and its pace. Once plans are presented, they tend to establish their own time boundaries and are conceived to be inherently logical and, therefore, the amount of what has to be accomplished during these times, i.e., the pace, is set.

The time dimension of planning has a dual implication. On the one hand, it frames the planning process into bounded time, stabilizing our perception. On the other hand, time (diachronic) implies change, simultaneity (synchronic), and interaction (diachronic/synchronic), which brings us to the basic argument of the dialectic feature of planning. To what degree either one of these orientations dominates our frame of reference is a question for further study. One thing can be assumed with relative confidence. Different people will be influenced differently by the time dimension which in turn implies communication problems as well as different implementational interpretations.

Changes in the Space Dimension

Planning is a process in which spaces to be involved in the process of change are defined. Any space definition implies coordinates. But coordinates themselves are not so much characteristics of a problem, rather they are a matter of definition. Furthermore, the more complex the problem, the more “wicked” it is (Rittel and Webber, 1973), the more arbitrary we are in defining the plan space coordinates. Space, social as well as physical, is not an absolute datum of experience, but depends on a preceding coordinate definition. The space coordinates are not true or false, but arbitrary statements. Indeed, previous experience is, in many cases, the main drive for defining the relevant space, which makes the decision of the planning boundaries more realistic. But, the danger is that planning might turn into a process of *preserving coincidence*.

One thing is certain—whoever defines the planning space determines the boundaries of the alternatives, the boundaries of choice and, in the last analysis, the types of solutions.

If we imagine moving a planning frame of reference around its social space vector, we can conceive the dynamics of the changing perceptions to the problem or the planning specific content. The broader the social space of the planning process, the more heterogeneous its content perceptions. Similarly, by moving this frame of reference around its physical space vector, different angles of the same content at the same time will be revealed. Time and space are coupled, and determination of either one of them will reduce the degrees of freedom available in determining the other. Every choice of time will tend to influence a corresponding space coordinate, and vice versa. But, still, this correlation leaves enough room for variation. Although diachronic time perspective will tend to be related to vertical space orientation—the movement of children from K-1 to K-12 for instance—a synchronic-vertical perspective means a system view of a whole school, such as the concept of school climate.

Social and physical space can be introduced into planning directly through concrete

organizations, structures and places, and through specified role holders. But space can be symbolized through mathematical signs such as econometric equations, for instance. In this case, we have a conceptual structure of space and, as such, an ideal image. Planning has thus the task of transforming these conceptual spaces into reality.

Structuring Causality

Any planned change in education is derived from the uncertainties inherent in the educational domain and is thus probabilistic in nature. One of the differences between plans is the degree to which probability is explicitly introduced and expressed. But probabilities are seldom explicated in educational plans. The determination of the time and space boundary coordinates, the organization of space in time so that the stream of events can be controlled, is a rational process of reducing uncertainties. This structuring aspect of planning dominates educational planning to a great degree, thus implicitly applying an unrealistic notion of causality. From this viewpoint, planning has the added virtue of artificially reducing uncertainty. Planning turns out to have a "magical" property. It does more than we asked of it: it begins to determine our own perception about the subject. However, it has to be remembered that from a pragmatic viewpoint, planning is a process which attempts to increase the perception of causality to the level which acquires enough confidence in accomplishing its promised results. It is not the immediate perception of the plan, but the concatenation of the logical progression of its components that compels us to comprehend causality and accept its validity. Paradoxically as it sounds, the sometimes illusive notion of causality has an important and central function in the process of decision-making.

The interrelationships between time, space and causality are almost self-explanatory. Diachronic time, with very narrow boundaries of space, will be associated with one-way causality, single cause and single effect. On the other extreme, synchronic time, with broad boundaries in space, will be associated with a more probabilistic view of interactive relations between multiple "causes" and multiple "effects". However, time and space coordinates and perspectives are, in most planning exercises, not coincidental results. They are decided upon according to predetermined views of causality. Hence a vicious circle can be observed. The relevant time and space is determined according to previous perceptions of causality based on experience, knowledge, or even belief. But once they are determined they tend to impose a much stronger feeling of causality. In other words, our "probabilistic" frame of reference is transformed into a more "casual" frame of reference.

In reality the problem is worse. It is a well-known fact that in many cases time and space coordinates are decided according to political considerations, such as a plan whose duration fits a presidential period or a coming election. Similarly, social space is determined according to socio-political considerations of satisfying interest groups or including sub-projects by broadening the physical space boundaries to compensate groups which feel hurt that other groups or sectors were in the planning focus. In many cases those political considerations are indeed an integral part of the plan. They are part of the relevant factors, part of the chain of causality. But the question is, to what degree do these considerations overlap the inherent characteristics of the subject being planned. Too often the political (maybe unavoidable) time-space considerations impose an irrelevant causal perception. The plan may be successfully implemented without any

Frame of Reference Transformation

As was stated above, the various dimension measurements of time and space and the assumptions about causality determine to a great extent one's planning frame of

reference. Hence, when we deal with two or more frames of reference we are essentially perceiving problems with different sets of dimensional measurements. The question of the nature of the planning frame of reference forces itself upon us when the same problem is perceived differently, based on different frames of reference.

We can redefine one of the major aspects of planning at this juncture: the intentional process of transforming the dimensions of time, space and causality. However, once transformation takes place unintended results are unavoidable. There is no plan which is immune to human intrusion.

In practice, transformation means that a frame of reference is put into motion, i.e., it changes its dimensions through interaction, producing a new perception. As a result, some elements might change their relative position or change their perceived relationships with other components. This is as yet on a quite general level.

At this point some preliminary distinctions and process explanation can be offered. First, in applying some basic mathematical concepts (Pettofrezzo, 1966), it is possible to distinguish between *homogeneous* and *nonhomogeneous* transformations. In the first case, all variables are changed in the same manner and take part in the new frame. Such transformation will yield a frame of reference with the same holistic properties, but with quite different implications. In the non-homogeneous transformation, through dilation, addition, or magnification, new variables are disclosed and old ones disappear.

The second distinction is in applying empirical findings and theoretical discussions treating perceptions as problem solving, i.e., the analysis of preferences for certain solutions (Rock, 1983). Here the question is raised as to whether the manifestation of a perceptual preference implies selection from among alternatives. The assumption is that "the perceptual system prefers wherever possible to account for all co-occurring changes on the basis of (such) a *common cause*" (emphasis added, Rock, 1983, p.135). The common cause idea suggests that there is a preference to relate changes to one another on a basis of a common cause in rejection of the coincidence principle. A further elaboration would be able to relate the common cause idea to homogeneous and non-homogeneous types of transformations. This takes into account that "temporal continuity alone is a powerful determinant of perceived causation" (Rock, 1983, p.137).

Third, an attempt has to be made to apply the huge amount of empirical studies and theoretical development in understanding the phenomena of biases of judgment under uncertainty (Kahneman et al., 1982), to planning, using the planning frame of reference as an intermediary variable. The main argument in these studies is that perception of decision problems, the evaluation of probability and outcomes produce predictable biases and fallacies in preferences when the same problem is framed in different ways (Tversky and Kahneman, 1981). For instance, in dealing with the concept of conjunction error, it was found that people tend to perceive the whole as more probable than each of its constituents (Tversky and Kahneman, 1983). Similarly, explanations, use of motive analysis, or the suggestion of linking relationship, such as in scenarios, are vulnerable to conjunction errors. "A detailed scenario consisting of causally linked and representative events may appear more probable than a subset of these events" (Tversky and Kahneman, 1983, p. 308). Furthermore, conjunction errors are only a symptom of a more general phenomenon, where people tend to overestimate the probabilities of representative events and underestimate the probabilities of less representative events. Might we not connect the representative and conjunctive effect with the perceptual common cause effect in order to have a better clarification of the fallacy phenomenon?

Summary

The main purpose of this essay has been to close some of the gaps in the usual presentation of planning without, however, anything in mind as pretentious as a self-contained theory. We began our analysis by disclosing the basic dimensions which build a frame of reference—time, space and causality—dealing then with how planning frames of reference are transformed. Some of the basic problems and processes of transformation have been expounded, focusing on the causal manipulative power of time transformation which is one of the basic factors in planning.

Planning problems and issues do not exist in a timeless, empty space. Once problems are perceived, they start to be shaped. But if we consider that the frame dimensions which determine our perceptions are themselves a product of a frame of reference, we might reach the conclusion that we may never have direct and objective knowledge of things in and from themselves. However, the transformation idea by no means implies that we have to accept the positivistic contention that the world is nothing but a transformed system of sense impressions. There is a logic to the construction of time, space and causality. They are not merely an arbitrary set of dimensions. Since planning is an intentional process of transformation, constant effort must be made to overcome the difficulty of distinguishing between the dimensions and the object.

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POLICY PLANNING AND ANALYSIS: IMPLICATIONS FOR RESEARCH

The planning and developmental processes of policies are complex, and from the vantage point of researchers the view is often nebulous. Perhaps this is true because policies often result from issues that generate controversial public problems. Public policies, according to Lindbloom (1968), may evolve from new opportunities, not necessarily from problems, and they may just happen. Policies unfold from problems through phases categorized by Jones (1984) as "getting the problem to government" and "obtaining governmental action on the problem." Within these generic levels, the processes for conducting research on public policy are in their early, developmental stages, where many methodologies lack the guidance of policy-relevant theories.

One significant constraint on public policy research efforts is the range of policy definitions. The term "policy" is frequently used in reference to highly diverse public actions and decisions. Policy today, like systems analysis in the 1960s, is a very dynamic and overused term. Its misuse may be avoided if something is known about the problem to which it is addressed. The literature offers terms such as energy policy, defense policy, legislative policy, etc. Yet policy may be misinterpreted as rules, regulations, or programs. Policy is, indeed, a comprehensive descriptor. Hecllo (1972) defined policy as a course of action or inaction instead of a set of specific decisions, directions, regulations, or rules to be followed.

If policy is a course of action, it is necessary, but not sufficient for the policy researcher to possess knowledge concerning the environmental conditions and activities of persons associated with policy planning, development, and implementation. The analyst or policy researcher should know the orientation of the policy makers, the context, and the sources of influence and pressure applied to people who formulate policy decisions.

The role of the policy researcher is to support the policy maker in complex tasks of solving problems affecting people. This function can be enhanced through the use of monitoring techniques, situational analysis, evaluation methods and futuristic technology that are integrated with contour research strategies.

McAdams (1984) offers two characteristics of policy research (analysis) that may assist us in perceptions about policy actions. First, he notes an attempt to sort out the costs and benefits of alternative policies. Second, policy analysis does not impose the values of the researcher on the cost-benefit calculation, but simply defers to the values of others. That is, the policy researcher should remain unbiased.

If policy makers do act according to principles or a typology of theories, the unbiased researcher should strive to understand the dimensions of the typological doctrines. The limits of research concerning this principle extend to the initial actions of getting the attention of people who can activate plans for the generation of solutions to policy arguments.

Activities of policy planning and analysis are multi-faceted, and there are three suggested divisions which serve as complementary guides for research. Evaluative research and evaluation discussed by Suchman (1967) are components of all three

divisions. These techniques allow the researcher to assess the degree to which conditions have or will become better or worse according to a given set of standards and judgments. The first division is historical, where the researcher may investigate the linear context and formative actions that generated a certain policy. Coplin and O'Leary (1981) defined this descriptive methodology as monitoring. Research activities that ameliorate monitoring involve acquisition of information pertaining to the policy makers' theoretical base or bases—a framework which guides actions.

The second division is oriented toward the present and may be described as situational. Thus, monitoring is complemented by defining the present. Situational or descriptive research may be performed on a policy that has existed for a long time or it may be applied to issues and policy arguments used in the formulation of a new policy.

Futuristic technology is the foundation of the third division. Futuristic techniques are employed primarily in research prior to the implementation of a new policy, answering the question "what if." The generation of alternative futures in policy research is frequently neglected because of time and financial constraints, leaving researchers in the restricted area of evaluating programs only after implementation. Program evaluation is the most common form of policy research.

Policy research strategies of the past have been described by Hall and Loucks (1982) as "vacuum cleaner" approaches with a broad focus and uncertain designs. This is perhaps a result of the many disciplines that lay claim to being oriented toward policy research. These writers favor the "contour research" approach which focuses upon multiple variable clusters as opposed to a broad spectrum of variables. The validity element of the contour strategy is research based and practitioner reviewed—a collaborative approach. By adding these elements of the contour research strategy to the three divisions of research outlined above, concept formulation may be facilitated. For example, as theories of planning and analysis are gradually defined and interrelated with the role of the policy maker, the gap between policy and practice has a higher probability of being decreased.

Facets of Policy Processes

Getting the attention of governmental officials often takes the route of popular controversial issues which unfold through policy arguments. Thus, getting a public problem to government requires a group of persons with knowledge of a human need for which a solution is sought. For example, people must become aware or perceive the need. How many people are going to be affected if the need persists and who are they? Are those in need organized for results? Are they aggressive and do they have the leadership required to attract the attention of persons in government? These questions bring us to an early phase in policy development described as agenda building (Bresnick, 1982).

Agenda building involves information dissemination, issue awareness, and the sensitizing of people in government to the need for response. Recent examples of policy arguments and agenda building are the activities of the National Commission on Excellence in Education (1983). According to Cobb and Elder (1982) there are many types of agenda setting activities such as estimating the scope of an issue, bargaining for support and seeking classification and support for alternative solutions. Although there are numerous routes for getting a problem to government, well-organized groups with and without established access have the best record (Jones, 1977). Radical groups, without established access, in the past two decades, however, have been successful in gaining entrance to the portals of government.

Gaining governmental action on a problem often requires pressure from some well-defined, legitimate group. With respect to group affiliation, Jones (1984) suggests

that the American system is biased toward the affluent, and even the problems of the poor groups eventually get acted on by the affluent. The process of proposing alternative impacts and bargaining for solutions are effected by the elite groups in politics. Specifically, public policy and action in government may be regarded as authoritative preferences of the governing elite (Anderson, 1979). Governmental action, especially at implementation and operation phases, is simply a means of deciding which groups get what, when, and how (Bresnick, 1982).

House (1982) views governmental action on policy planning and development as an art, but acknowledges that officials in the policy making arena are inept and rely on guesses. He admits that practitioners of policy planning and development should move aside and allow specialists with methods and models to show governmental officials how "it" should be done. He indicates support for minimizing the construction of more abstract and rhetorical arguments for systems analysis and operations research models in policy studies.

There exists enough technological methodologies and gimmicks to carry policy research into the twenty-first century. However, more work should be completed on the scrutiny of theoretical classifications for analyzing public policy processes and working with policy makers. Research quality should be enhanced when the theoretical bases of policy makers and researchers are defined. The constraint "lack of theoretical framework" (framework for the researcher plus framework for understanding the policy maker) can be minimized by gaining access to policy-relevant theoretical classifications. Policy-relevant in the context used here means theories that clearly describe actions (behaviors) of the policy maker and methodology to be used by the policy researcher in assisting the policy maker with the design of policy. A theoretical passageway would most certainly be of value in preparing future analysts and in the reorientation of those that are trapped between technology and the "muddling through" processes of policy development.

As a case against "muddling through" Cunningham (1980) notes that the improvement of policy should be through a more rational process. He supports the belief that policy development needs to be a disciplined and organized process. He was asking for the policy process to be systematic in order to simplify the job of research. Because policy development processes are often perceived by researchers as non-disciplined, does not lend support for the policy research process to also be without form or theory. In the context of this article, theory is defined as a belief that can be described or procedure followed as a basis for action. Our colleagues who deal with operations research models are supportive of certain theories such as rational or synoptic. But a unification typology between the traditional "vacuum cleaner" policy research and rational systems theory is missing—researchers apply a gimmick here and there, evaluate a program and then proclaim that policy analysis has been accomplished. All that may have happened, however, was to "muddle through" with technology as a crutch. Nothing in policy studies is to one extreme, rational, or to the opposite, radical.

For policy analysts to conduct first-rate research, they are compelled to employ formalized and systematic frameworks (Hy, 1978). This structure commands a comprehensive view, where recognition of a wide spectrum of theory and technology is vital. Research by Mitchell (1981) indicated the need for scientifically sophisticated analyses and theoretical frameworks in policy development. Scioli and Cook (1979) also favor a methodological approach to policy analysis with a substantive focus on policy demands, formulation, enactment, output, implementation, and impact. They support the assumption that policy studies can best be undertaken when relevant to the guidance of empirically validated policy-relevant theory.

C. Kenneth Tanner

As we look toward theories of policy analysis and planning, some significant questions should be confronted. For example, which sets of theories should be pursued? Can the accepted methods of analysis be merged with a certain typology of theories for the practitioner and researcher to yield lucid directions? What are some feasible, basic theories from which to commence?

We might begin with proposing a taxonomy of theories for practicing policy planners and academia. Whether these two groups will agree is an issue that shall be decided in the future. Next, these theories must be tested in some systematic manner. This will be a tough activity, indeed, because the world of policy studies is littered with fragments of many disciplines. The job is not impossible, however. Once the initial testing is completed both practitioners and scholars may work together to create clear directives for policy planning and analysis. The results will be more feasible solutions to educational, social, human, and economic problems.

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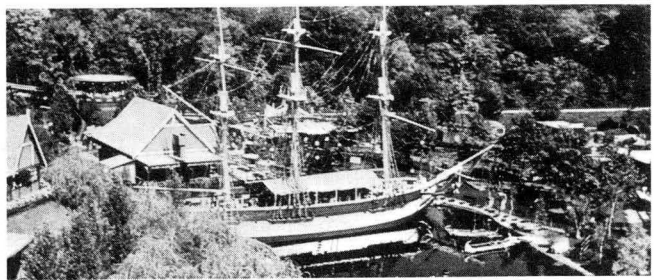
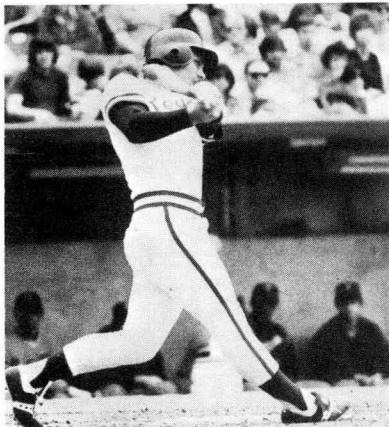
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