

EDUCATIONAL PLANNING

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PROMOTING THE STUDY AND PRACTICE OF EDUCATIONAL PLANNING

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EDUCATIONAL PLANNING

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NUMBER 4

Notes on Contributors	2
Planning for Effective Mentoring in the Preparation of School Administrators <i>Ivan D. Muse, Gloria Jean Thomas, and F. Del Wasden</i>	3
Challenging the Traditional Economics of Education Planning Model: A Case Study <i>Richard H. Kraft and E. Warren Tyler</i>	9
School-Site Strategic Planning and Service Marketing in the 1990's: Implications for Educational Planners <i>John L. Keedy</i>	21
A Collaborative Model for Encouraging Black Students to Choose Careers in Education <i>Wilma J. Henry</i>	27

ANNOUNCEMENTS

Thank You Note — Dan Inbar	2
Secretary's Report	30
Invitation to Submit Manuscripts	31
Subscription Page	32

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Letter from the President

Dear fellow ISEP members:

It is an honor for me to write and thank you all for the trust placed in me. The ISEP presidency is an exciting challenge.

It seems that the International Society for Educational Planning can and should take a more central place in the thought, research and practice of education. As planners, we can hardly use the term "too soon" in beginning this change. This centrality in education would be assured if the field of educational planning would disengage itself from its prescriptive image and establish the terms under which a continuous dialogue can be developed. We should seek terms which formulate the extent of educational expectations and explore ways to attain them.

This is a good opportunity to express my recognition and appreciation to Bob Beach, Bill McInerney and Ron Lindahl, who carry, with great success, the everyday burden of ISEP and our *Journal*. Let me also express my appreciation to Glen Earthman and his staff who are working hard for a most interesting conference at Virginia Beach. We have some exciting new initiatives to discuss with the membership and I am looking forward to again meeting with you.

Dan Inbar

PLANNING FOR EFFECTIVE MENTORING IN THE PREPARATION OF SCHOOL ADMINISTRATORS

Mentoring. The word has taken on almost mystical, magical meaning as it is applied to the training of less experienced persons by those more knowledgeable. The first mentor (from whose name the term is derived) was the companion of King Odysseus some 3000 years ago. Mentor was charged with the care and education of Odysseus's son, Telemachus, while the king was away fighting the Trojans for 20 years. No mentoring relationship today, whether in business, art, science, or education, can take on the personal and professional long-term aspects of that original mythical experience between Mentor and Telemachus. Yet, the benefits that can accrue to a novice studying with a master are recognized, even though this training may be difficult to arrange.

Today mentoring is being adapted to the preparation and training of young professionals in many fields (Alleman, Cochran, Doverspike, & Newman, 1984; Galvez-Hjornevik, 1986; Hennecke, 1983; Krupp, 1985; Merriam, 1983; Roche, 1979; Zey, 1984). Due to the value of aspiring school principals learning the procedures of leadership by working with experienced principals, various types of internships and practical field experiences have been incorporated into training programs (Daresh, 1986; National Commission for the Principalship, 1990). In many programs, the person who supervises the student during these field experiences is called a *mentor*. The term *mentoring* has been loosely used to cover every situation from a student's spending a couple of hours interviewing a school administrator about principalship to a practicum student's hovering behind a principal for a few hours a day during a semester to an intern's spending a year full-time in an administrative assistant role under the tutelage of a selected, trained mentor principal.

If the mentoring relationship between the future administrator and the experienced principal is to be positive and beneficial, it must be long-term. The mentor must be recognized as an effective school leader and as an important member of the university training effort (Wasden, Muse & Ovard, 1987). The intern student must understand the mentoring process and be enthusiastic about establishing a close working relationship with a school leader. Both mentor principal and intern must benefit from the time together.

Yet, even when administrator preparation programs incorporate the best processes of mentoring into the training of aspiring school principals, some problems may occur. Mentoring is not a panacea for all the widely publicized problems with the training of school administrators; some hazards inherent to the mentoring relationship have prompted questions about the effectiveness of mentoring. The best mentoring programs include cooperation between school district and university personnel in the selection, training, and evaluation of mentor principals. Mentor principals in these programs are not left without guidance in how to structure internships that will be of value in the preparation of future school principals. A network of mentor principals, district superintendents, and university faculty will provide the resources and mutual support needed to make the program work (Wasden, et al., 1987).

Information from highly successful, university-based training programs that include mentoring as a key component have revealed 12 common pitfalls that can befall even the best programs. However, these problems can usually be resolved with patience and time taken to

build bridges of understanding between the mentor and the intern (Muse, Thomas, & Wasden, 1988).

1) GOOD PRINCIPALS MAY NOT BE GOOD MENTORS.

In the selection of mentor principals, the best educational leaders must be sought. Because of difficulty in establishing criteria to determine potential as a mentor, some excellent principals may be selected who are not effective as mentors. They may not be fully committed to the concept and value of mentoring, they may not have enough inservice training to understand their roles and responsibilities as mentors, they may lack the ability to express their philosophy of administration to young interns, or they may be so busy with other duties that they have no time or desire to nurture a mentoring relationship.

SOLUTION: School superintendents, district selection committees, and university personnel should work together to establish criteria for selection of mentor principals. Inservice meetings and workshops should be held regularly to inform mentors about their responsibilities. Some mentors may choose to discontinue their involvement when they realize that the role of mentor does not match their own professional goals and commitments. Principals who prove to be less successful as mentors should receive additional inservice about their responsibilities or be encouraged to serve aspiring administrators in other ways.

2) MENTORS MAY BE TOO PROTECTIVE AND CONTROLLING.

Mentor principals may protect their interns from making mistakes that would naturally be made in the course of learning administrative procedures. In their desire to appear to be helpful mentors, they may keep interns from making errors, cover for intern mistakes, or hold interns back from learning experiences. Some principals may feel that their reputations suffer if their interns do not do well.

SOLUTION: Mentors must be selected who are secure in their own positions, who realize that future school administrators learn from mistakes and that mentoring is a learning experience for interns. Analysis of intern activities, including any mistakes, should be encouraged. Frequent inservice meetings among mentor principals and university faculty provide an opportunity to discuss these problems. Mentoring assignments must be monitored so that over-protectiveness of the protege does not develop.

3) MENTORS MAY HAVE PERSONAL AGENDAS TO FULFILL.

Some mentor principals may appreciate the status that accompanies the role but fail to have interns' interests at heart because of personal agendas and responsibilities. In their desire to have an unpaid assistant principal, someone to supervise and control, or a hallway monitor or substitute teacher, mentors may exploit interns and the mentoring process. Other mentors may use the intern for needed but unfulfilling assignments, neglecting to recognize that the intern needs to experience the full scope of principalship duties, not merely the mundane.

SOLUTION: Mentor principals must be carefully selected for their altruistic desire to assist aspiring school administrators as well as for their ability to nurture and encourage. The mentoring process must be constantly monitored by program directors; mentors and interns must be given opportunities to evaluate the process and each other. Part of the inservice preparation for mentor principals should include instruction on assigning appropriate tasks to interns.

4) MENTORS MAY NOT ACKNOWLEDGE AN INTERN'S LIMITATIONS.

A mentoring relationship may become so close that the mentor principal loses objectivity regarding the intern and begins to believe the intern is ready for tasks or positions beyond the

intern's abilities. This halo effect hurts both intern and mentor when others see the intern's shortcomings or when the intern fails.

SOLUTION: Inservice preparation in appropriate assignments for interns may guide the mentor in determining when an intern is ready for new responsibilities. The mentoring process must include objective evaluation processes by which the mentor assesses the intern's progress. Evaluations by teachers, other school administrators and staff, university personnel, and students can add to the cumulative evaluation of the intern.

5) INTERNS MAY GET ONLY A LIMITED PERSPECTIVE FROM A MENTOR.

Each mentor principal has developed a certain administrative style or method of operation, and that is the only style the intern can learn from that mentor. If the mentor believes there is only one right way of managing a school operation, the intern will be prevented from questioning, learning, and discussing other methods. Dogmatic administrators who recognize only one way to administer are not effective as mentors.

SOLUTION: Mentor principals must be selected who themselves are open to questioning and learning. They must be encouraged to realize their own limitations and refer the intern to other mentors for advice and information when appropriate. Inservice workshops may facilitate mentors' learning of other administrative styles, approaches to decision making, and methods of problem solving. Occasionally, mentors may have to be dropped from a program if they prove to be inflexible or too authoritarian with interns.

6) INTERNS MAY BECOME TOO DEPENDENT ON MENTORS.

The interns often enter a mentoring relationship lacking self-confidence and administrative skill. They may consider the mentor to be a perfect model of an effective principal. Whether encouraged by the mentor or not, some interns become so dependent on their mentor principals that they become unable to handle responsibility independently or to separate themselves from their mentors. They may desire to become clones of their mentors. If the mentor is placed on too high a pedestal by the intern, he or she may become discouraged and may feel incapable of reaching such heights of perfect performance. Should the mentor fall off the pedestal, the intern may be so disillusioned that the mentoring relationship falls with the hero.

SOLUTION: Mature interns must be selected who are ready to learn from professional relationships with mentors. Mentors who see interns becoming dependent upon them must explain the problem, structure separate activities, and encourage them to consult with other mentor principals. Mentor principals must be selected who are genuine, sincere administrators able to admit failures as well as triumphs, and able to give credit to everyone involved with their successes. They may not always be charismatic, perfect, or ideal, but they should always be good administrators.

7) INTERNS MAY BECOME CARBON COPIES OF MENTORS IN THE EYES OF OTHERS.

If the mentor principal and intern work too closely together, the intern's style, attitudes, and opinions may be perceived to be indistinguishable from those of the mentor. People may conclude that the intern is able to speak for the mentor and vice versa. When the intern attempts to speak out independently of the mentor, to use different methods, or to make decisions different from those expected of the mentor, the mentor may object to losing a "rubber stamp" or others may question the intern's ability to act without the mentor's affirmation.

SOLUTION: Mentors must be encouraged to allow interns to develop their own administrative styles and methods and not just copy the mentor. Interns, while often admiring

a mentor, must concentrate on adapting, not adopting, the mentor's style or methods. Recognizing that long-term internships are most worthwhile, the intern could be assigned to a succession of full-time field experiences in more than one school.

8) SOCIETAL STEREOTYPES MAY INHIBIT CROSS-GENDER MENTORING RELATIONSHIPS.

In most organizations and professions, including education, stereotyped attitudes about male/female relationships and roles may keep mentors from fulfilling their roles and responsibilities as mentors. Male mentors may feel over-protective of female interns or, influenced by outdated views of female roles and abilities, give female interns fewer opportunities, thereby keeping them out of the network for career advancement. Female mentors may also rely on stereotypes of male administrators and neglect to provide learning opportunities for male interns, assuming they are part of the "good old boy network." Interns of either gender may feel that they can learn only from mentors of the same gender. Speculation about sexual or intimate improprieties may accompany a cross-gender mentoring assignment. National publicity about relationships between men and women that began as mentoring and evolved into romantic encounters may make cross-gender mentoring arrangements suspect.

SOLUTION: The easiest solution is to avoid all formal mentoring arrangements between men and women. However, the benefits of men and women working with mentors or interns of the opposite gender must be recognized because future educational leaders can gain perspectives unavailable in any other way and may learn about the fallacies of stereotyping administrators. Also, there are so few women in educational administration that women would seldom have opportunities to be involved in mentoring relationships if they never were able to work with men. Because of the possibilities of rumors of improprieties, greater social distance between mentor and intern or more formality in the mentoring relationship may be mandated. The mature mentor principal and intern can ensure that their relationship is strictly professional by being aware that innuendo and gossip can follow mentoring relationships. Mentoring activities should be limited to standard tasks performed during regular school hours at school.

9) WOMEN MENTORS MAY NOT BE AVAILABLE IN EDUCATIONAL ADMINISTRATION.

Research is inconclusive as to whether men can be role models or mentors for women. Yet, because top administrative positions in education remain almost the exclusive domain of men in many areas, women often have few opportunities to have female mentors or to develop any type of network to assist in career advancement. Some women in top positions develop "queen bee" attitudes, refusing to assist other women. With the problems inherent in cross-gender mentoring, women often fail to have beneficial mentoring relationships.

SOLUTION: Talented, ambitious women should be encouraged to seek positions as administrators, and women who are successful in educational administration must be encouraged to serve as mentor principals. Mentors and interns should benefit from inservice workshops that address issues of gender in educational leadership and work to break down stereotypes about men's and women's roles in education.

10) EVERYONE MAY EXPECT TOO MUCH OF A MENTORING RELATIONSHIP.

Publicity about the efficacy of mentoring as a learning vehicle may lead participants in such a program to expect to be given full administrative responsibilities as an intern, immediate placement in a school principalship upon completion of an internship, and instant success as a novice principal. On the other hand, a mentor principal may agree to serve in a program

expecting a bright, talented intern grateful for the opportunity to listen to the words of wisdom the mentor has to offer. Mentoring has so many connotations that everyone involved may have different expectations of what will result from the relationship.

SOLUTION: All mentor principals and interns must be informed of the goals of the relationship immediately upon beginning their involvement in the program. The results of mentoring as one phase of administrator preparation must be clearly stated so that the intern does not expect automatic success. The work and activities expected of interns and mentors must be outlined in detail. The intern and mentor then may discuss their expectations for their relationship, writing down goals and objectives as applicable. Mentors and interns must have confidence in each other and in mentoring as a preparation method so that their expectations are compatible.

11) INTERNS MAY NEVER ACHIEVE PEER STATUS.

Once a mentoring relationship is over and the former intern is a school administrator, the mentor principal and new administrator should view each as colleagues. However, after working under the supervision of a mentor, emulating a mentor, or knowing that one owes ability or position to a mentor, some interns may be unable to regard themselves as peers of their former mentors. Similarly, a mentor may never allow a former intern to forget that he or she was once dependent on the mentor and owes the mentor for position or status. The superior-subordinate relationship never ends, regardless of actual position or status in educational administration.

SOLUTION: Although gratitude and recognition of a mentor's contribution to an intern's career are important, the mentoring relationship should conclude with the mentor's recognizing the former intern as an equal, prepared to be a contributing colleague. Mentors unable to accept their former interns as equals may need assistance in understanding the role of mentor as an aide to those who will be their future partners and colleagues.

12) THE MENTOR RELATIONSHIP MAY JUST NOT WORK.

Because personalities and styles of performance differ, some mentoring relationships will be more successful than others. "Bad chemistry" between mentor principal and intern may result in so much friction that the relationship cannot be a learning situation and may damage the people and the program. An intern or a mentor may hurt the feelings of the other, betray the trust of the other, or otherwise damage the mentoring relationship.

SOLUTION: Careful selection and pairing of participants, guidelines for activities, clear criteria for evaluations, and discussion of mutual expectations for the mentoring relationship generally insure that the mentoring relationship will benefit both mentor and intern. However, no leadership preparation program will ever be 100 percent successful for all of the participants.

SUMMARY

Mentoring of aspiring school principals by experienced, caring, and competent principals has the potential to be one of the most effective ways of preparing future leaders for our schools. Yet, a mentoring program must be more than assigning a graduate student in educational administration to observe a local school principal for a few hours during a semester. A meaningful mentoring relationship relies on the careful selection, training, and evaluation of mentor principals as well as the careful selection of interns. Pitfalls may occur occasionally when the mentoring relationship fails to provide a valuable field experience for the aspiring administrator, but mentors and interns who are committed to mentoring will all benefit from the close professional relationship provided by such a preparation program.

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CHALLENGING THE TRADITIONAL ECONOMICS OF EDUCATION PLANNING MODEL: A CASE STUDY

INTRODUCTION

For over two decades human capital theory has dominated education assistance planning. Development assistance agencies, such as the World Bank, USAID, and UNESCO, have tied education assistance plans to the results of their macro- and micro-economic analyses conducted under the aegis of human capital theory. In this paper we challenge the validity and pertinence of human capital theory, with its attendant economic analyses, in justifying and planning education programs. In order to help clarify the issues, we have used a recent education assistance proposal for Swaziland to illustrate the various points we raise. Finally, we offer some financial analysis techniques that we believe are of real value to education planners.

BACKGROUND

For the past 45 years, international development agencies have provided funding for education assistance projects and programs in Third World countries. While assistance to education has consistently remained around ten percent of the total annual assistance expenditures, the planning for educational assistance has undergone several changes. In 1964, for example, the effectiveness of education assistance programs was seriously questioned. Harold L. Enarson, then director of USAID's Division of Education Services, fairly summarized the situation when he reported:

We find new classrooms without trained teachers, teachers without books, outmoded curricula, whole programs of instruction without relevance to the society they purport to serve, and—almost always—a failure to plan. We have learned some lessons: that it is easier to buy things than to train people, easier to translate U.S. books than to assist in the writing of local texts, easier to provide assistance in select fields than to assist in modernizing an entire institution, easier to select plausible “targets of opportunity” than to develop a strategy for human resource development, and (when things go wrong) easier to blame the host country than ourselves! (Enarson, p. 47).

It was during this time of self-examination that the works of T.W. Schultz (1961), and Harbison and Myers (1964) convinced many educators and economists that there was a causal link between levels of education within a populace and rates of national economic growth. Subsequently, human capital theory and the development of human resources began to dominate education policy and program planning for development. Actually, as Joseph Farrell (1975) noted a decade later, this was the point where education planning was captured by economists, and it has remained captive to human capital economic theory until the present.

Tying education planning for development to an economic theory, even one as popular as human capital theory, has not produced the expected results. In an independent report, *Does Aid*

Work?, commissioned by the Joint Ministerial Committee of the Boards of Governors of the World Bank and International Monetary Fund, Robert Cassen and associates (1987) note that in terms of physical outputs, schools built, enrollment, and so on, education projects are quite successful. In terms of effects, however, education projects too often produce graduates for whom there are no employment prospects; these projects too often encourage rural to urban migration. Overall, it seems that there is little difference between the outcomes of the education assistance programs criticized by Enarson in 1964 and the outcomes of more recent education assistance programs reported by Cassen and associates in 1987.

HUMAN CAPITAL THEORY

It is important to note that economics is not a unified body of knowledge and methodology (Easton, 1989). Many recent works by economists, such as *The Crisis in Economic Theory* (Bell & Kristol, 1981), *Economics in Disarray* (Wiles & Ruth, 1984), and *Why Economics is Not Yet a Science* (Eichner, 1983), question the power and validity of current economic theory to explicate empirical phenomena or predict outcomes. More importantly, human capital theory was challenged from the outset for its methodological and explicator weaknesses. Even some early proponents later rejected human capital theory for these very reasons (Jencks, 1972; Carnoy, 1974; Blaug, 1976).

More recently, Mace (1984) and Klees (1989) expressed serious doubts about the usefulness and validity of *any* economic analysis in guiding education policy planning because concerns of education extend well beyond the bounds of purely economic issues. They were especially critical of the human capital theory for its methodological and theoretical shortcomings. A growing number of economists are concluding that education policies and plans based upon human capital theory are actually based upon dubious assumptions about the relationship between education and economics.

In his challenge to macro-economists and their reliance on econometric models, Nicholas Georgescu-Roegen (1971) said, "The idea that human propensities, which are the main vehicle of economic change, are not arithmomorphic concepts, therefore, is not a fancy of some unscientific school of thought." (336). He indicated that: 1) human behavior is not subject to linear modeling; 2) human propensities drive economic change and not vice versa; and 3) science encompasses more than simple measurement. Development assistance for education, however, has been tied to the linear similes of macro-economists and this, in part, may explain why education projects have produced mixed results, at best.

In their summary, Fagerlind and Saha (1983) write:

a basic fallacy in the reasoning [of human capital theory] is that the size of the residuals in linear models can be the result of many factors, not the least of which concerns the specifications of the model itself (including the underlying assumptions), as well as the adequate measurement of the variables in the model. In short, the strength of human capital theory rests upon theoretical assumptions and methodological procedures which, to say the least, are tenuous with the best of data. Given the dubious quality and inadequacy of the data available for most early human capital research, it is not surprising that policies based on the theory have failed to produce the expected results (p. 43).

Human capitalists assume that increasing the levels of education for individuals and raising the overall level of education within a country will cause increased personal income and national economic growth. However, the relationship that they assume exists between education and economic growth has never been unequivocally demonstrated. In a review of human capital theory, Fagerlind and Saha (1983) noted that they and other researchers found that individual income growth is at least as attributable to socioeconomic class and innate ability as to educational level. In fact, educational level was itself subordinate to factors of class and ability. Likewise, structural factors such as a nation's economic, political, and social systems, which tend to discriminate against some strata in the society, also affected income success more than did education.

THE CASE OF SWAZILAND

Swaziland was chosen for this analysis for three reasons: 1) the proposal for initiating an education assistance project was recent and typical of proposals for other developing nations; 2) Swaziland typifies the conditions to be found in most developing nations; and 3) the authors are intimately familiar with the proposal.

The government of Swaziland had three education goals: 1) to improve the quality of education, which had dropped during the most recent period of school expansion; 2) to expand further education to meet rising population growth; and 3) to accomplish all this within the planned budgetary increases.

Swaziland is a small, land-locked kingdom in the south of Africa. In 1980, it had a population of just over 500,000. At that time and since, it has sustained a population growth rate of 3.2% per year, one of the highest growth rates in the world. Its major products in order of economic importance are sugar, timber, coal, and asbestos. Swaziland also has a tourist industry based on the attraction of South Africans to Swaziland's legal gambling casinos. About 23,000 Swazi laborers work outside the country each year, usually in the mines and on the large farms of South Africa. Wages earned by these laborers are an important part of the overall national economy. In addition, over 50% of the government's revenues are payments from the South African Cooperative Union (SACU). SACU provides for the free passage of goods between South Africa, Lesotho, Botswana, and Swaziland; establishes a common tariff for exports out of SACU to the rest of the world market; and divides among the four countries revenues from customs, excise, and sales duties according to a specified formula.

Agriculture is the dominant employer in both the formal and traditional sectors of Swazi economy. Over half the population works in the traditional agriculture sector. Manufacturing is shown to contribute 24% of the nation's total Gross Domestic Product (GDP) but this figure is misleading because the major manufacturing activities are the processing of sugar cane into sugar and timber into lumber; therefore both activities should be reported under agriculture. More importantly, the national government is one of the largest employers in the country of educated and skilled workers; Education is one of the largest employers within the government.

The recent economic sanctions against the Republic of South Africa have benefited Swaziland because products from Swaziland are exempt from the sanctions. A Coca-Cola syrup company, a shoe manufacturer, a textile mill, and several other small firms have relocated their planned or actual production operations from South Africa to Swaziland in order to avoid the sanctions. These operations, however, are capital intensive rather than labor intensive. Consequently, they have not significantly raised the level of employment in Swaziland nor is there any assurance that these operations will stay once the sanctions are lifted from South Africa (Hood, 1989).

The chart on the next page shows the wage employment, by skill, of the nation's workforce for 1986.

The "traditional" economy consists mainly of family-based, unpaid household labor and inactive unskilled workers living on an estimated 40,000 rural homesteads and principally engaging in small farming with some non-farm handicraft work to supplement income. Little is known about human resources in this sector but surely the educational level is low.

The "informal" economy comprises less than four percent of eligible workers and consists mainly of full-time, self-employed workers in a shoe repair, wood work and construction trades, handicrafts, selling, and hair work occupations. These workers are considered in the monetary sector but incomes are considerably lower than in the above listed skill areas.

Source: Ministry of Education, Swaziland, Manpower, Education, and Training, Report of the National Manpower Survey; Mbabane. 1987)]

TABLE I

Skill	Private Sector	Public Sector	Total
Professional/Tech	777	7,834	8,611
Admin./Managerial	874	975	1,849
Clerical and related	3,583	4,627	8,210
Skilled manual	1,410	1,113	2,523
Semi-skilled manual	4,757	2,441	7,198
Unskilled manual	22,496	6,445	28,941
Agriculture	16,410		16,410
Totals:	50,307	23,435	73,742

Note: Those working in the traditional economy and informal economy are typically not accounted for in this or most other economic analyses because these data are not maintained.

Although the preceding description of the economic activity within the country is brief, several points are apparent. First, the small size of the population practically eliminates any substantial opportunity for the local manufacture of substitutes for imported products because the internal market is too small to offset the capital costs of most manufacturing ventures. Second, the larger nations neighboring Swaziland are in an equal, if not better, position to attract foreign industry and are highly motivated to do so. Finally, the mineral and timber resources of the country are already being exploited to the fullest extent possible and the mineral resources will eventually be depleted. In fact, Japan was a major buyer of Swaziland iron ore until it ran out in 1977. Essentially, Swaziland has a single product economy based on sugar production. To expand further sugar cane production would require an extensive and costly irrigation system. Given the volatile world market for sugar, there is little to suggest that expansion of sugar production would, in any case, provide stable long-term economic growth.

SWAZILAND AND HUMAN CAPITAL THEORY

A basic premise of human capital theory, or (as it is sometimes called) human resource development, is that raising levels of education within a population is tantamount to raising levels of personal income and increasing national economic growth. This premise sounds like

a theorem from applied mechanics in which the variables are clearly identifiable and precisely measurable rather than an hypothesis from a social science in which the variables are not always identifiable or measurable with any certainty. Nevertheless, development agencies continue to use the rhetoric of human capital theory to justify development projects. The written justification for the project under discussion reiterates the typical human resource development rationale that has been required by these agencies for the past two decades. Consider the following:

The long term goal of the project is to establish an efficient and high quality *human resource base for sustainable development and economic growth. Human capital formation* through education and training is vital to *long term economic and development prospects* and it is expected that project-related outcomes will have a profound effect upon the children's educational experience, affecting the number of years of education they receive, the subjects they study, and the way they are evaluated and promoted through the system. Consequently, these reforms will determine how well schools prepare *the future workforce* to participate in and promote the nation's *economic development*. ...the major benefits [from the reforms] are an improved internal efficiency (measured in *real net economic benefits*) and an increase in *external productivity* (as measured in *greater wage and salary differentials* and *higher expected life time earnings*). (USAID, 1989, p. 6) [emphasis ours].

Like other education assistance proposals, nothing in the Swaziland proposal explains how this educational project is to foster economic growth. This omission reflects the continuing uncertainty about the link between a project's expected educational outcomes and a nation's future economic growth. In other words, the claim that this project will foster economic growth is little more than an article of faith, the validity of which is extremely questionable. As Mace (1984) pointed out, there is no evidence that spending on education has ever brought about the equalization of incomes within nations or that it has ever produced the expected economic growth in Third World countries that human capitalists have predicted all along.

In the case at hand, the predicted "increase in external productivity (as measured in greater wage and salary differentials and higher life time earnings)" (USAID, 19989) is extremely unlikely to come about. Ironically, this conclusion is supported by a study contained in the project proposal itself. "Manpower, Education and Training," a report of the results of an investigation conducted by the International Labour Office (ILO) for the government of Swaziland in 1987, analyzes the relationship between educational output and employment within each sector of Swazi economy and throughout the total economy. The report made projections for levels of future employment within each sector for the years 1988 through 1993. These projections were made for both high and low estimates of future sectoral growth by 1993. Table II shows the projected total increase in jobs by 1993 over 1986 levels of employment.

The project proposal does not state the GDP growth rates used by the ILO for their high and low estimates of economic growth. It should be noted, however, that the only difference in job growth areas between these high and low estimates is the increase in jobs for the unskilled, unschooled workers. The report does not give the actual GDP growth rates used by the ILO but even the higher of the two economic growth rates forecasted does not show a corresponding increase in demand for skilled labor. Plainly, the ILO report shows, at least in the short-term, a limit to skilled labor needs in Swaziland.

TABLE II
Projected Increase in Employment by Skill

	Professional Tech/Nontech		Sub-professional Tech/Nontech		Clerical/Manual Skild/Semi-skild		Unskilled
<i>1986 Employment Level:</i>	815	5998	2666	6119	18575	16849	44759
Total: 95,781							
<i>Low Economic Growth:</i>	303	2121	980	2075	7345	6593	-1692
Total Increase: 19,417 skilled - 1,692 unskilled = 17,725							
<i>High Economic Growth:</i>	303	2121	980	2075	7345	6593	4307
Total Increase: 19,417 skilled + 4,307 unskilled = 23,724							

Source: International Labor Office. *Manpower, Education, and Training*. P. 26.

Table III shows the expected educational output for the years 1986 through 1993.

TABLE III
Projected Output of the Education System 1986-1993

Educational Level (Job qualifications)	Total
Univ. degree math/science (Professional-technical)	644
Univ. degree humanities/liberal arts (Professional-non-technical)	1,712
Post-secondary math/science/vocational (Sub-professional-technical)	4,449
Post-secondary (Sub-professional—non-technical)	10,901
General secondary completion (Clerical and skilled labor)	26,886
Intermediate to literacy level (Semi-skilled clerical and labor)	52,418
Total:	97,020

Source: International Labour Office. *Manpower, Education and Training*. p. 28.

When totals from Tables II (19,417) and III (97,020) are compared, the results show that Swaziland's educational system, as it is currently being planned, will produce five times more skilled workers than needed by 1993. Even in the best of circumstances, the streams of future earnings of the few who do obtain the higher paying skilled labor jobs will not offset the cost of educating the many who do not obtain such jobs. From an economic perspective, producing more skilled workers than the labor market needs is a waste of scarce resources. This is not to say that the education of these workers might not be fully justified but such justification cannot be made on the basis of human capital theory. The promise of the project's written rationale—that education will play a key role in raising incomes and worker productivity, broadening the distribution of incomes, and fostering economic growth—is negated even by economic data provided in the Swaziland report itself. A simple, cursory analysis of these data clearly shows that, in economic terms, the Swaziland project cannot possibly be cost effective by the proposal's own definitions.

The analysis can be taken a step further. Given Swaziland's current birth rate, even if their economy were to grow at the phenomenal rate of ten percent per year, and the demand for skilled labor were to increase correspondingly, the streams of increased future earnings that human capital theory credits to education would still only apply to less than half of the individuals receiving an education.

Further, national fortunes, like those of corporations, are just as apt to go down as they are to go up. For example, in the early 1980s, Swaziland suffered a major economic recession, followed by the bankruptcy of a long-standing major employer, a large manufacturer of fertilizers. If a national economic recession were to occur again during the life of this project, then none of the economic values assigned to future returns from the investment in education would materialize. The point is that human capital theory ascribes many economic benefits to education and training that do not necessarily occur in national economies all the time or in any one single economy at some predictable time.

Swaziland is not an isolated instance of the errors inherent in human capital theory. There are numerous similar examples (Mabogunje, 1981; Harrison, 1987; Easton, 1989). For education planners, the pitfalls of tying education projects to macro-economic objectives are numerous. First, there is no real evidence to support economists' assumption that for a given amount of investment in education there is always a corresponding amount of economic benefit to either the national economy or to the individuals receiving the education.

Second, economic predictions, like weather predictions, are extremely time sensitive; the farther out in time they go, the less reliable they are. Education takes a great deal of time—it is measured in years not months.

Third, the vulnerability of Third World economies to changes in world economic conditions combined with the lack of reliable data within these countries makes even short-term economic forecasts suspect.

Fourth, economists cannot account for the informal economy, which in many Third World countries forms a very high percentage of the total economic activity within these countries.

Finally, from an evaluation perspective, regardless of the effectiveness of a program in attaining its education or training objectives, that program must be rated a failure if its announced economic objectives do not occur. Consequently, tying education planning to specific economic ends is counterproductive from the planner's perspective. By predicating his definition of success on faulty grounds, he creates in advance the perception of failure no matter how successful the project may actually turn out to be.

AN ALTERNATIVE PROPOSAL

We all acknowledge that education serves some political, social, cultural, and individual goals, as well as some economic ones, but in our education assistance planning we have tended to overemphasize the economic goals. Of course, it is imperative that a government know how, when, and where to obtain the resources to support education, but it is not necessary to justify the use of these resources in terms of economic returns and benefits. In the case of Swaziland, as with most other developing nations, there was much that demonstrated that Swaziland's educational objectives were worthwhile and appropriate for assistance from an outside agency.

The Government of Swaziland (GOS) currently spends about 23% of the national budget on education and has been increasing expenditures in capital outlay and operations for education over the past eight years. As yet, the Swazis have not been able to build and staff enough schools to keep up with population growth but their intent is to provide primary education for all their young people. In a recent study conducted by the GOS, researchers identified a number of problems within the current educational system. Resolving these problems would improve the quality of education and reduce the cost per student. The problems identified by the GOS (Ministry of Education, 1987) were:

1. The school curriculum overemphasized academic subjects while ignoring technical, agricultural, and home economics courses more appropriate to current realities in Swaziland.
2. Student scores on standard tests had steadily declined over the past eight or more years.
3. School drop-out rates and grade-repetition rates were unacceptably high.
4. Headmasters were not adequately prepared to manage and lead school programs.
5. The information necessary to manage the education system, to plan improvements and program expansions, and to prepare annual school budgets was not readily available.

These are ubiquitous problems that seem to plague the educational systems of the less developed and more developed countries alike. Certainly, making the curriculum relevant, improving school management, having access to pertinent data, and reducing schooling costs by reducing grade-repetition rates are necessary and worthy objectives. The donor agency's response was to propose a project having the following objectives:

1. To produce high quality and appropriately trained students and school leavers as indicated by the study of practical subjects and mastery of basic skills and fluency in English.
2. To improve logistics management in schools as indicated by an increase in the timely availability of a standard set of commodities.
3. To improve the effectiveness of instruction as indicated by student test scores.
4. To improve the instructional leadership of headmasters as indicated by improved student test scores and an increase in the number of primary schools offering home economics and agriculture courses.
5. To have teachers actively engaged in instructional activities at least 90% of their classroom time.
6. To provide the Ministry of Education with empirically generated data to make policy and planning decisions.
7. To increase cooperation among teachers, headmasters, and communities.
8. To reduce repetition and drop-out rates.

In order to accomplish these objectives, the agency initially proposed to install a management information system, set up a continuous assessment and guidance program, and install an interactive radio instruction system (USAID, 1989). Whether the agency's response

was appropriate to Swaziland's needs could not be determined from the information contained in the project proposal. Moreover, the agency's response is not at issue in this study. What is more important is to construct a model of financial analysis that would be infinitely more valuable to policy makers, project planners, and evaluators.

Financial analysis, an approach used by corporations and banks, uses the analytical techniques of economics, but confines analysis to the immediate arena of operation. In education, for example, economists try to capture the possible costs and benefits, both public and private, that accrue to a course of action. Financial analysts, on the other hand, examine costs in terms of budgetary or revenue expenditures and benefits in terms of the educational outcomes of a policy or program. Simple cost feasibility studies, cost-benefit analyses, cost-utility analyses, and cost-effectiveness comparisons are some of the analytical techniques used in financial analysis.

There are numerous examples in which school policymakers have, usually, through some type of grant funding, instituted a successful pilot project such as say, computer assisted instruction, only to find that they cannot afford to implement the program district-wide as intended. If they had analyzed the cost of a district-wide program beforehand, they would have seen that the program was too expensive and could have avoided the cost of the pilot program as well. In the Swaziland case, a cost feasibility study eliminated the agency's initial proposal to provide radio-based interactive instruction to the country's rural population. Since the rural areas did not have electricity, the agency would have had to distribute battery powered transistor radios. The initial cost of individual transistor radios coupled with the recurring costs of supplying batteries and maintaining the radios was shown to be prohibitive and logistically impractical. In this particular detail, the application of a financial analysis tool—cost feasibility—helped agency planners to avoid a pitfall common to many educational projects.

Another tool of education finance, cost-benefit analysis allows planners to compare effectively two or more like programs that differ in costs and benefits. By *benefits* we do not mean future income benefits that those completing the program may obtain, but rather the relative ease and degree of effectiveness with which participants in the program acquire the skills and knowledge intended. For example, a cost-benefit analysis revealing that Y program will raise individual student math scores an average of five points at an estimated cost of one dollar per point per student as compared to X program that will raise student math scores an average of ten points at an estimated cost of one and a half dollars per point per student clearly provides pertinent information that decision makers can use with a reasonable degree of confidence. The choice of program may depend on factors other than economic ones, but the relative costs and benefits are known beforehand.

In the Swaziland proposal, however, the major cost-benefit analysis was tied to the macro-economic projections. The proposed program benefits were the estimated future streams of student earnings that would eventually offset the present cost of implementing the proposed program. While such optimistic estimates of future benefits may help sell a program, they are of little immediate value to those who must plan and operate programs within fixed annual budgets. Moreover, in these future-oriented projections, there is no attempt to provide a worst case scenario such as an economic recession or an extended period of slow economic growth. A worst case scenario would probably reveal beforehand the flaws and shortcomings of a planned policy or its real value.

In the Swaziland proposal there was, however, one excellent example of cost-benefit analysis of the type we are advocating. Because of grade repetitions and school dropouts, Swazi schools required an average of twelve years of schooling to produce one graduate from a seven-year primary education program. If the agency's proposed actions were to reduce the

average time it took students to complete primary education by ten percent, the net present value of costs savings to Swaziland, just during the period of the project, would exceed the agency's planned investment in the whole project. Based on previous experience, the agency conservatively projected that, by the end of the five-year program, the average time for student completion of elementary education would be reduced almost 30%. Thus, regardless of future earnings the proposed project would be cost beneficial in the short term. In this case there was no need for the agency to bear the heavy expense of conducting an economic analysis when a financial analysis would have served.

Cost-utility and cost-effectiveness analysis are two additional tools of financial analysis useful to educational planners. They were not included in the initial Swaziland project proposal but they could be easily applied within any education system. For example, during the detailed planning phase of the Swaziland project, planners will be trying to choose between a variety of school and management development curricula and between management information systems, each of which is designed to achieve one or more specific project goals. Since all of these are competing for the same resources, it is imperative to select the combination of programs and curricula that will produce the best results with the resources available now and in the foreseeable future. Both cost-effectiveness and cost-utility analyses can be of real value in this situation.

Cost-utility analysis attempts to quantify a subjective decision or preference. In economics, *utility* refers to the supposed satisfaction that a consumer obtains from his purchases, assuming that everyone wants to maximize utility (satisfaction). In the school setting, utility can be viewed as the need students have for the learning provided by a given course or program. On a scale of one to nine, with nine indicating the greatest utility, basic math skills and even consumer math would rank very high. Geometry, trigonometry, and calculus would rank much lower than basic math on the utility scale. To determine the utility of a course of study, one must consider its value not in terms of the individual students but in terms of the student body or of the society as a whole. Using this perspective of utility, most educators and administrators could derive a figure for the utility of a given subject or given level of learning in a subject.

Following up the math example, suppose that a group of experienced elementary teachers are asked to apply utility scaling to three different math programs being considered for implementation. The instructional effectiveness of any of these programs is not known, so the teachers must place a value (utility to the students) on the intended outcomes of each of the three programs. For program A they assign a utility rating of seven, for program B they assign a utility rating of eight, and for program C they assign a utility rating of five. Then by taking the cost of each program and dividing its cost by its assigned utility rating, they would arrive at a very simple utility-cost ratio for each of the programs which would allow them to make some comparison among the programs.

Suppose, however, that all three programs had almost identical intended learning outcomes and so were given identical utility ratings. Suppose also that there were no significant cost differences among the programs. In this instance the teachers would be asked to examine the instructional materials and assign each program a probability rating that indicates the likelihood students would acquire the learning intended by the program. If the probabilities differ, then the product of each program probability times its assigned utility rating is divided into its cost to produce a cost-utility ratio. Although the result is nothing more than another set of cost-utility ratios, these ratios do provide some distinctions among seemingly identical programs and allow planners to quantify and compare their relative judgments of each program considered.

Whereas cost-utility analysis is simply an attempt to compare similar programs when the only *real* information available is their relative costs, cost effectiveness considers real costs and real effects. Cost effectiveness is a way to analyze programs or courses of action in order to determine which produces the desired outcome at the least cost. To most managers, cost effectiveness is simply viewed as getting the biggest bang for the buck.

In our setting, determining cost effectiveness is a simple, straightforward analytical procedure. Suppose, for example, that schools need to improve their scores on a national or state-wide exam, as in the Swaziland case. In their search for ways to raise student scores, educators find four well-documented instructional strategies that in the past have successfully raised student scores on the test in question. Suppose that reducing class size would raise individual student scores an average of eight points at a total cost of \$20,000. Computer assisted instruction (CAI) would raise individual student scores an average of 23 points at a total cost of \$142,000. Individualized student instruction would raise individual student scores an average of 13 points at a total cost of \$38,000. Peer tutoring would raise individual student scores an average of four points at a total cost of \$9,000. Since the numbers of students affected does not vary among the strategies, then simply dividing the total cost of each strategy by its score increase provides a relative measure of cost effectiveness. Thus, the measure of cost effectiveness for reducing class size is \$2500, the measure of cost effectiveness for CAI is \$6174, the measure of cost effectiveness for peer tutoring is \$2250, and the measure of cost effectiveness for individualized instruction is \$2923. In the present example, peer tutoring is the most cost effective method to raise student scores.

Depending on available funds, decision makers could consider combining the two most cost effective methods. If, by combining the two strategies, there happens to be an additive or synergistic effect, they will have achieved an even more cost effective resolution of their immediate problem.

SUMMARY

The relationship between education and future earnings or national economic growth remain speculative and anecdotal at best. Moreover, economists' predictions about future economic growth within the developing countries have seldom proven reliable. Finally, the real reasons countries provide education are, for the most part, external to economic consideration. Consequently, education planners should proceed with planning education to meet the articulated political, social, and cultural demands of the present and near future rather than bend the education system to satisfy economic objectives.

While we have been critical of the economic theories and analytical techniques used in past education assistance program planning, we are not advocating to throw out the baby with the bath water. With the case study of Swaziland, we have tried to show that some economic information is necessary to any sound planning. We have also tried to show that most of this information can be captured at less cost by using financial analysis rather than by using the macro- and micro-economic analyses of the past.

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SCHOOL-SITE STRATEGIC PLANNING AND SERVICE MARKETING IN THE 1990s: IMPLICATIONS FOR EDUCATIONAL PLANNERS

Within the next decade, much of the strategic planning traditionally done by state education agencies (SEAs) and district offices may be done at the school level. In the traditional organization paradigm, two rules have been: 1) “centralize the organization” and 2) “make the hierarchy complex” (Barker, 1989, p. 15). Taylor’s scientific management and Weber’s bureaucratic efficiency were major contributions to this paradigm. The new rules will emphasize competition among smaller units and decentralization. Adaptability to changes in the school environment will replace organization efficiency (Organ, 1971) as a key operations construct.

This paradigm shift has significant implications for public education where the power of the marketplace and a growing pressure for a national assessment system will translate into ever-increasing autonomy for school units. Strategic planning may become a crucial management tool as school unit personnel scan their environment and link up resources to implement their institutional missions. Organ (1971) called this process the service-market relationship. In this article we will: 1) sketch our scenario for market-driven schools; 2) contend that more strategic planning will devolve from the states and districts to school sites; and 3) discuss implications for educational planning and for state policymakers. *Educational planning* is viewed not as a series of sequential, logically associated procedures but as a continual process of interaction, interpretation, decision, and further interaction (Adams, 1987). We define *strategic planning* both as a subset of educational planning and a complement to organization management; strategic planning and management focus on the relationships among the organization, its stockholders, and the environment in ways to achieve an institutional mission (Steiner, 1979; cited by O’Brien, 1991). *Educational policy* is defined as “a specified course of action, resulting from a decision or choice, to be followed by people at any level of government in solving public problems” (Tanner, 1991, p. 95).

Schooling and the Phenomenon of Flatter Organizations

Within the next decade public school sites may become major decision-making units as they compete with other service-providers for students and public funds. Superintendents, central offices, and local boards will lose some decision-making authority to school sites. School-site autonomy (often referred to as site-based management under the heading of *restructuring*) will be the product of the twin engines of market-driven schools and a national assessment system.

Public Schooling and the Marketplace

More autonomy and accountability could be precursors of the open market system of education. Finn (1990) predicted that we would have an array of delivery systems for education (from proprietary and chartered schools to electronic linkages among distant locations). Davies (1988) envisioned the merit badge system. Neighborhood schools comprised of several students each, could meet in homes of state-certified teachers issuing merit badges to students demonstrating appropriate knowledge and skills. Chubb and Moe (1990) called for open competition in which schools compete in the open market for students. Any school unit, including independent schools meeting state criteria, would be eligible to accept students and receive public funds.

Across- and within-district vouchers and parental choice would add extra competition to the education marketplace, since parents would have, in effect, their own tax money to spend on the schools of their choice. Parental choice extending into the private and parochial sectors is being proposed at all levels of government (Olson, 1991). Under President Bush's New American Schools Plan, 535 new schools with innovative concepts of schooling will each receive \$1 million in federal start-up funds. Personnel at these schools are encouraged to set aside all assumptions about schooling (Rothman, 1991). These units may also compete for public monies. Within the private sector the Golden Rule Insurance Company in Indiana has provided 686 students with up to \$800 per student for tuition at private and parochial schools of their parents' choice (Weisman, 1991).

If open competition and the marketplace are new watchwords for the 1990s, how can consumers be convinced that competing units are measuring up to their public school counterparts? The answer may lie in some form of a national assessment system. It is unclear whether this system will take the form of national standards, a national curriculum, or national examinations. However, any set of uniform measurement imposed on all education providers could add fuel to the fire of this market-driven concept of education.

A National Assessment System May Not Be That Far Off

Traditionally, public education has been a local responsibility and the responsibility of the fifty state governments as declared by the Constitution's Tenth Amendment (i.e., public education as a state, not a national responsibility). However, we may be closer than we realize to setting national standards through a uniform assessment system or even a national curriculum. Three ingredients in the national assessment formula are: 1) growing public pressure for a national dimension to school reform; 2) standardization of core curricula; and 3) business pressure on the federal government to assume a school improvement role.

Public Receptivity Toward Standardizing Student Performance on the National Level

Traditional local control of education and our Constitution have been perceived as major obstacles to some form of a national education system. Local school boards, so the reasoning goes, have protected local interests in doing what is best for each district's students. Results from the 1987 Gallup Poll, however, indicated that our citizenry might be less enamored with local and state control than had been presumed. Eighty-four percent of the citizens polled favored having the *federal government require* local districts to meet minimal educational standards (Hawley, 1988, p. 23).

The National Assessment of Educational Progress (NAEP), financed by Congress, already delivers annual national report cards on students' skills. The NAEP governing board unanimously approved a plan to set the first national standards for student achievement. In 1991 the governing board provided national-level 1990 data on student performance in eighth-grade mathematics. In 1992, this pilot assessment is also expected to include fourth-grade mathematics and reading and state-by-state comparisons (Rothman, 1990).

Some national leaders go beyond national assessment and advocate a national curriculum. In *Reporter's Notebook* (1990), Marshall Smith, Dean of Stanford's Graduate School of Education, suggested that the trend is toward a national curriculum. He cited the recent expansion of the NAEP and national curricula recommendations by subject-area groups (e.g., National Council of Teachers of Mathematics and the National Board of Professional Teaching Standards). Smith speculated that if the federal government did not coordinate this curriculum, such an effort would lead to chaos. With growing public awareness of our students' low academic performance on international tests, more of our citizenry may consider a national role

increasingly palatable. Despite being the only Western nation without a national curriculum, we may be, at the very least, lurching toward a national assessment.

Standardization of Core Curricula

Arguably, a blueprint of a national curriculum already exists as 50 similar sets of state-level core curricula. The major players in the state-mandated reform efforts have been textbook publishers, test publishers, and SEAs. Textbooks are correlated to broadly-formulated core curricula objectives mandated for local districts by SEAs. Test publishers coordinate test items with text objectives and core curricula. Educators on the local level align their curricula to demonstrate to the ever-watchful public what they hope will be higher standardized test scores. Thus, we already may have a national curriculum without realizing it.

Growing Pressure on the Federal Government

The federal government may be forced to take a more active role in public education, if only because of growing pressure from business. Many business leaders are concerned about the abilities of high school students entering the workplace. Can the United States corporations produce quality products competitive in the international marketplace without quality school systems? Businesses spend millions of dollars annually to train their workers in skills they claim the public schools should be providing before their students enter the workplace. In one survey, 77 percent of top-level business executives rated public schools as fair or poor (Bradley, 1989).

Various alliances have made education the highest priority on their agendas. The National Alliance of Business is developing performance-based tests designed to measure proficiency in specific high school subjects (Pipho, 1990). The National Governors' Association may have finally persuaded President Bush to lure the federal government back into the education arena, as signaled by the Charlottesville summit and Bush's six national goals.

The New Deal: Accountability in Exchange for Autonomy

Measuring student performance at the national level is gaining momentum as consumer and business dissatisfaction with public education builds. An injection of the marketplace into public education would fit hand-in-glove with the student outcomes paradigm. Public school units, called "government schools" by Chubb and Moe, would compete for the same students in the open marketplace with state-approved parochial, independent, and charter schools. Service providers with the highest student performance presumably would attract the most customers.

Some public schools, such as those in Dade County, Florida, contract some services out to private agencies. Just how this bold move is going to be accepted is unclear as of this writing. However, if private organizations operate public schools, the word *accountability* will take on a strict business management definition. Long-forgotten practices, such as cost benefit, may become a buzzword of the 1990s. With technology a permanent item in the school-improvement agenda, we may see the resurgence of what Callagan called "Cult of Efficiency" (1962).

Given the present trend, the cornerstone of public education will be the individual schools—not school systems—since public school units will compete with other service providers. School units may be given autonomy (flexibility from district and local board mandates, regulations and guidelines) in exchange for accountability. Lamar Alexander—then chair of the National Governors Association—summarized this exchange: "We'll regulate less, if schools and school districts will produce better results" (Alexander, 1986). This may happen with the new privately operated public schools (private-public). The more productive school units will have commensurate autonomy to make school-based decisions. Even Shanker (1990)

of the American Federation of Teachers advocated both incentives for successful schools and school autonomy; schools consistently failing to meet student needs would be shut down.

Policymakers and education, business, and community leaders have all recognized the need for a fundamentally different education system. According to Pipho (1990), "The new emphasis ... would provide flexibility but would also hold the system accountable; it would engage students and give power to students. For the most part, it shifts the emphasis away from how the system works to how it serves the needs of students" (p. 24).

More School Autonomy Translates to a Need for Strategic Planning

School critics, (e.g., Finn; Chubb and Moe) are sending a chilling message to public school personnel: schools will be given the autonomy necessary to compete with other service providers in the marketplace (the business model).

School advocates, on the other hand, believe that school-site autonomy is necessary for authorizing administrators and teachers to decide how best to meet student needs (the professional model). Darling-Hammond (1991) advocates decentralizing resources so investments can be made where they are needed. Sizer (cited by Darling-Hammond, 1991) argues that if students are to use their minds well, education will have to be highly personalized with smaller school units. Administrators and teachers at each school must first determine the needs of their students. Then school-site personnel should redesign their schools around these needs.

Both the marketplace and student-advocacy perspectives share a client-centered mission and a need for strategic planning. Halal (1984) concluded that strategic planning and management involved defining an organization's mission and devising strategies to align resources with environmental opportunities to achieve its mission. This process emphasizes a *service-market relationship*.

Implications for Educational Planning for the 1990s

Starting with the mid-1970s, "The federal role in policy making has been substantially reduced, the state role has increased, and the primary goal has shifted from equity to excellence" (Karper & Boyd, 1988, p. 21). State decision making may have peaked with the state-mandated reforms following *A Nation at Risk* (1983). These "top-down" reforms have not worked; student achievement remains at mediocre levels (Applebee, Langer, & Mullis, 1989). Both school critics and school advocates are pressuring the education establishment for considerable school autonomy. With more decision making perhaps inevitable at the site level, what are some policy implications for strategic planning at the site and state levels? What will be the interplay between "top-down" planners using rational planning models and school-site personnel?

First, the field of educational planning will become even more interactive and interpretive as school-site planners compete and collaborate with their state and district counterparts. The absence of a broad consensus about the purpose of schooling has created a patchwork of programs meeting conflicting and often competing demands (Timar, 1989). Second, SEAs will become far less regulatory and more service-oriented. (e.g., Virginia's SEA). Third, school accountability increasingly will be defined through the value system of businesses. More private public schools funded by both public and private monies will appear. Fourth, top-down planning will yield to client-based planning at the school site as opposed to state-mandated procedures. Is top-down, rational decision making, with its sophisticated quantitative planning techniques, truly dead and buried?

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A COLLABORATIVE MODEL FOR ENCOURAGING BLACK STUDENTS TO CHOOSE CAREERS IN EDUCATION

A crisis facing American society is the sharp decrease in the number of black students enrolling in colleges and universities. Data provided by the American Council on Education, Office of Minority Affairs (1986), show that between 1980 and 1984 black undergraduate enrollment declined four percent and graduate enrollment declined 12%. The data show that, for the 1984-85 school year, blacks received only 11.7% of all bachelor's degrees, 10.4% of all master's degrees, and 9.5% of all first professional degrees awarded (Wilson and Justin, 1988). These data strongly indicate that there is a decline in the percentage of black student representation at each level of higher education. Based on these data, demographers predict that, by the year 2000, one-third of the nation's K-12 students will be black (Sadker and Sadker, 1988) and in 1990 black educators constituted only five percent of the nation's teaching force (Baratz, 1986).

Teacher education as a career no longer has the appeal among blacks that it once had. Many blacks in college are now opting for the higher paying, more prestigious degree areas of business, engineering, and the sciences, rather than teacher education (Smith, Miller and Joy, 1988). A greater number of blacks enrolled in colleges remain undecided and express a preference for mathematics and computer sciences instead of teaching (ACT, 1986).

A large number of urban teachers are leaving the profession for higher status, higher paying non-education jobs. Of those minority teachers who remain, as many as one-fourth are uncertified in the subjects they are teaching; many of them do not have the educational background necessary to become certified in the subjects they teach (Hodgkinson, 1986). During the past five years, the percentage of black teachers has decreased from 7.8% to the present 6.9%. Changing demographics demand an increase in the number of blacks at all levels of education in order to prepare additional educational leaders to serve the growing multicultural, multiracial, multiethnic and multilingual student populations. There must be an increase in educators, representing all minority groups, to serve as role models and to address the specific needs of minorities. Without such an increase, the next generation of minority students will be less equipped to function within our changing, increasingly technological world.

The decline in black participation in higher education has prompted many colleges and universities to develop programs in collaboration with public school systems. These programs are developed to identify black students, to attract them to the field of education, and to develop their potential for college success. One such collaborative model has been implemented at Wright State University, Dayton, Ohio.

THE MODEL

One of the strategic goals of Wright State University (WSU) has been "to increase access and success for individuals representative of culturally, racially, and socioeconomically diverse backgrounds" (WSU Strategic Plan, 1988). A preliminary effort toward accomplishing this goal was the establishment of the Office of Pre-College Programs. The office collaborates with university, public school, and corporate officials to develop programs that will provide black students the opportunity to gain access to programs at WSU. This office's programs, Horizons in Business, Horizons in Education and Human Services, Horizons in Engineering, Horizons in Nursing, Horizons in Medicine, and Wright-Step, have targeted black students as early as the seventh grade.

The Horizons in Education and Human Services Program

Begun in the summer, 1989, the purpose of the Horizons in Education and Human Services (HEHS) Program is to provide the junior high and high school students with a precollegiate experience which focuses on the reinforcement of academic skills, cultural/social enhancement, career development, and meaningful work experiences. The underlying purpose is to encourage black students to choose teaching as a career and to encourage them to major in under-represented teaching fields.

Students are recruited for the program from local high schools, through the Office of Pre-College Programs, and through direct contact with parents, prospective students, and high school counselors. Student selection is based on academic potential for college success and leadership skill. Each student is required to submit an application, biographical statement, high school transcript, and letters of recommendation from a high school counselor and teacher. Parental consent is also required. Finally, students are interviewed to determine their leadership ability and personality characteristics.

HEHS students are involved in a six-week summer program on the campus of WSU. During the morning hours, Monday through Thursday, the students take classes in mathematics and computer enrichment, and participate in a variety of education and human service modules that include: Self as Teacher, Teaching, Learning and Self, Careers in Education and Human Services, and College Survival Skills. On Friday mornings, the students go on cultural field trips. In the afternoon, they are placed in work assignments in several offices within the college. Through these assignments, students have the opportunity to interact with professors in completing various tasks and are paid for their work.

The math enrichment and computer enrichment classes are taught by WSU undergraduate majors in math and computer science. The participants are given a pre-test to determine their levels of math skills and are taught on the basis of the identified-skill levels. At the conclusion of the math course, the students are tested to determine their level of math competency.

Education and human service topics are taught by the college's faculty and staff. The module, Self as Teacher, was developed to address self-exploration and human relations skills. During this class the Edwards Personal Preference Schedule, High School Personality Questionnaire and Myers-Briggs Type Indicator are administered. This class is also used to explore culturally diverse activities and to process the students' experiences on field trips.

Writing a research paper is the major focus of the module Teaching, Learning and Self. The publication, *Teaching as Learning: The Personal Dimensions of Teacher Growth*, (Ohio Department of Education, 1987), is provided to each student and used in class discussion. Test scores obtained from personality tests taken during this phase are interpreted and students participate in self-development activities.

Careers in Education introduces students to various career options available in educational fields. The instructional modes are lectures, discussion, and special presentations. Job hunting strategies and job maintenance skills are a part of the careers portion of this module.

College Survival Skills is presented by staff from the University Division, the university library, and the Division of Student Affairs. During this module, students are taught how to use the library, shown study skills, and introduced to the admissions process and financial aid opportunities.

Six field trips are a part of the students' HEHS experience. Students visit such places as the National Afro-American Museum, Dayton Natural History Museum, Sunwatch Twelfth-Century Indian Village, Dunbar House State Memorial, other cultural and historic sites, and a local bookstore. As part of the trip to the bookstore, students are allowed \$10 toward the purchase of a book and a 10 percent discount on the purchase of books relating to teaching.

The program concludes with a weekend stay in the residence hall on campus, during which students are involved in various social and recreational activities and hear many presentations concerning college life. A banquet honoring students who have completed the HEHS program is also held at the conclusion of the program. During the banquet, one outstanding student is awarded a Challenge Scholarship consisting of full tuition, room and board, and books for four years at WSU.

Additionally, two deserving students are awarded a four year scholarship, consisting of full tuition to Wright State University. Each student who successfully completes the program receives a one-year, full-tuition, scholarship to WSU upon graduation from high school.

Follow-up activities to the HEHS summer program include three meetings during the following academic year. One meeting per quarter is held to discuss students' academic progress in high school and any personal, academic, or career concerns. Members of the college's Student Services staff and faculty who participate in the summer program serve as mentors and collaborate with the students' high school counselors to intervene when needed. Students who complete the initial summer program are invited to participate in a Horizons experience each summer until they graduate from high school.

Although the program is relatively new, assessment and follow-up techniques have revealed positive results. For example, all students who have completed the HEHS program to date have been promoted to the the next grade level or have graduated from high school. All of the students who graduated from high school returned to the HEHS summer program in 1990 and successfully completed a college—level course for three credit hours. Ninety percent of these students have gone on to enroll at WSU, majoring in education, and are progressing well in their course work. Additionally, students' responses to a questionnaire at the end of each HEHS program indicate that it is effective in all areas.

Does the program work? Evidence gathered thus far and cited above suggest that it does. The ultimate success of this program will be realized when HEHS students become professionals in the field.

Conclusion

There is a significant decline in participation by black students in higher education. The dwindling black enrollment in specific degree programs has prompted many colleges and universities to adopt the concept of "growing their own students." The Office of Pre-College Programs at WSU is providing a link between area high schools and local industry in a combined effort to support black student access to opportunities in higher education. Once students are identified, programs such as Horizons in Education and Human Services reinforce participants' academic skills, expose them to various career options, and enhance their cultural and social experiences. Financial support for various program activities is provided by local businesses. This collaboration is an important ingredient in successfully implementing the Horizons Model. However, greater commitments are needed to recruit and retain blacks in teacher education. Six weeks of nurturing and support each summer is not enough to keep these students on the right track. It is imperative that these students be involved in a program of continued nurturing and support throughout their high school years. Finally, assessment, follow-up, intervention, and evaluation are critically important to identify and retain students with potential.

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Secretary's Report 1991-1992

The 22nd annual conference of the International Society for Educational Planning was held October 10-13, 1991, at the Waterford Hotel, Oklahoma City, Oklahoma. Hosted by the Oklahoma City Public Schools, the conference was structured around the theme, Planning for Educational Reform. Thanks are due to the conference planning committee members: Maridyth McBee, John Fink, Susan Purser, Kim Apel-Morrow, Kay Banks, Randy Brown, Linda Carter, Pat Elam, Regina High, Bridgette Kimbro, Vicki Land, Khanh Nguyen, Bernard Schafstall, Thomas Sinegal, Jo Stucker, Tonya Terrell, Richard Weeter, and Letha Woodruff. Special thanks are owed to Maridyth and John, who had the idea of going to Oklahoma City in the first place, and who were indefatigable in seeing to the needs of conference attendees.

President Ken Ducote offered the thanks of the organization to the hosts, and to Superintendent Art Steller of the Oklahoma City Public Schools. Ken also thanked the presenters for their contributions to an excellent conference.

Our officers for 1991-1992 are:

President	Dan Inbar
Vice President	Ron Lindahl
Secretary/Treasurer	Bill McInerney

We elected five persons to the Board of Directors:

Kathryn Gerbino	two year term (completing Ron Lindahl's term)
Glen Earthman	three year term
John Fink	three year term
Bob Legrone	three year term
Herb Sheathelm	three year term

Bob Beach, editor of *Educational Planning*, noted that the journal, which is refereed, is abstracted in ERIC and in Educational Administration Abstracts, and urged conference attendees to submit articles, and to call the journal to the attention of colleagues and students. He noted that articles by and about practitioners are especially welcome, as they are often difficult to find in other sources of planning literature. Bob reported that the journal is now into the production of the volume eight series.

Herb Sheathelm commended President Ken Ducote for his many years of service and his many contributions to the organization, including the Exemplary Local School District Planning Award. The attendees signalled approval with a warm round of applause.

Again, I would call to the attention of the membership the book of readings in educational planning which Bob Carlson and Gary Awkerman edited and produced. The book is *Educational Planning: Concepts, Strategies, and Practices* (1991), published by Longman (ISBN 0-8013-0434-2). Many professors are using it with their classes, and finding it a very valuable resource.

INVITATION TO SUBMIT MANUSCRIPTS

The editors of *Educational Planning*, a refereed journal of educational planning issues, invite the submission of original manuscripts for publication consideration. *Educational Planning* is the official journal of the International Society for Educational Planning.

The journal's audience includes national and provincial/state planners, university faculty, members of educational administration, school district administrators and planners, and other practitioners.

The publication's purpose is to serve as a meeting ground for the 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.

Articles preferred for inclusion are manuscripts from practitioners, reports of empirical research, expository writings including analyses of topical problems, or anecdotal accounts. Unsolicited manuscripts are welcomed. The following criteria have been established for the submission of manuscripts:

1. Each manuscript submission must be accompanied by a letter signed by the author.
2. The length of the manuscript should not exceed 20 double-spaced, typewritten pages (including reference lists, tables, charts, and/or graphs).
3. Two copies of each manuscript should be submitted.
4. Lengthy tables, drawings, and charts should be scaled to an *Educational Planning* page and camera-ready.
5. A biographical sketch of each author should be attached to each manuscript.
6. The Editors prefer APA style.

All manuscripts will be evaluated on the basis of relevancy, substance, style and syntax, and ease of comprehension. Submission conveys permission to edit and publish as required. Authors are responsible for copyright clearance and accuracy of information presented.

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<p>ORGANIZATION</p>	<p>The Society was founded on December 10, 1970, in Washington, D.C. Over 50 local, state, national, and international planners attended the first organizational meeting.</p> <p>Since then its growth has demonstrated that there is need for a professional organization with educational planning as its exclusive concern.</p>
<p>PURPOSE</p>	<p>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.</p>
<p>MEMBERSHIP IN THE SOCIETY</p>	<p>Membership in the Society is open to any person active or interested in educational planning and the purposes of the Society. To join the Society or renew a membership, please submit and complete the enclosed form.</p> <p>Please forward check and membership form to:</p> <p>ISEP Dr. William D. McInerney, Sec.-Treas. Educational Administration Purdue University G-10 South Campus Courts West Lafayette, IN 47907 USA</p>

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