

THE ESTABLISHMENT OF A CONCEPTUAL FRAMEWORK
TO ENHANCE EDUCATORS' UNDERSTANDING
OF COMPREHENSIVE PLANNING

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ABSTRACT

THE ESTABLISHMENT OF A CONCEPTUAL FRAMEWORK TO ENHANCE EDUCATORS' UNDERSTANDING OF COMPREHENSIVE PLANNING

By

George William Stansbury, Jr.

The major objective of this study was to establish a conceptual framework to enhance educators' understanding and awareness of the comprehensive planning process. The increased understanding and awareness that educators may acquire from this framework should aid in efforts at coordinating comprehensive planning and educational planning activities.

This study was divided into two parts. First: the planning literature was reviewed to identify the contemporary trends and focus of comprehensive planning. This review also identified certain factors and their meanings utilized by the planning profession.

Second: these identified factors were used to establish a conceptual framework of the comprehensive planning process. Together, these parts provide the basics needed by educators to better understand the present conditions and future projections of a given area.

The significant need and educational implications for this study is that presently both planning and education are in transitional phases moving from ad hoc planning activities to those more comprehensive in nature. Education is affected by the social, economic, physical and political activities and changes in society. As the demands of society become more socially oriented, education, being one of the most prominent and dominant of society's sub-systems, has both much to contribute and much to gain from cooperative intersystem approaches to comprehensive planning. This is especially true today, for planning, in becoming comprehensive, is focusing upon social needs and desires and is incorporating them into the general context of the comprehensive plan. Thus, the sub-system of education is at this time becoming directly involved within the comprehensive planning process. However, before education or any other part of the "total system" can either contribute to or gain from it, an understanding of what this new comprehensiveness means is necessary. The framework established in this study should help develop this understanding.

Today, planning is that activity which attempts to coordinate and synthesize all the sub-systems of society's larger whole within the context of a comprehensive plan. However, this activity has not yet reached the level of sophistication needed to coordinate and synthesize all

the social, economic and physical variables within the existing legal-political framework. This may best be accomplished by involving the various sub-systems of the larger whole within the comprehensive planning process.

The framework established in this study should enable educators to become both more accountable and more responsible for fiscal and physical educational planning activities by involving themselves within the comprehensive planning process. Involvement within this process will also give the educational leaders of an area added time for pursuits of an educational nature. This study indicates that education has much to gain from the process of planning. It also emphasizes that the process of planning can never be complete unless the needs, desires, goals and objectives of education are included within the comprehensive planning process. This may best be accomplished through the efforts of educators working with comprehensive planners so that educational needs and desires may be incorporated into the comprehensive planning process in a practical, realistic and humanistic manner.

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By

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1971

DEDICATION

This thesis and all my graduate work and future pursuits are dedicated to my wife, Jan, for years of love, encouragement and help.

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The writer expresses his deepest gratitude to Dr. Charles A. Blackman, major advisor, for his understanding and advice during the preparation of this Thesis, and for making my graduate program at Michigan State University a stimulating and rewarding experience. The writer is also most appreciative to the members of his guidance committee: Dr. Louise M. Sause, Dr. Dale V. Alam, and Professor Charles W. Barr, for their guidance, encouragement, and helpful criticism.

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CHAPTER I

INTRODUCTION

The Need

As society enters the decade of the 70's, the certainty exists that the complexity of our social institutions will become unmanageable unless steps are taken to guide their growth and direction. In the past, these attempts have been rather laissez-faire, looking at each of our institutions as rather a unique, independent social sub-system. With an estimated population of 230 million by 1980 and an increasing demand on our social institutions, these permissive tactics of the past will no longer suffice.

The 70's will initiate new procedures in planning, with a comprehensiveness that previously has been looked upon with much skepticism.

The new planning techniques will attempt to develop coordinated and cooperative efforts to bridge the gaps that exist among social, economic and physical planning so that the end product will truly reflect social needs and be humanistically oriented.

The tasks facing comprehensive planning, as a synthesizing activity of society, in the 1970's will be

vast. It must propose new ways to solve the many conflicts that exist among the various levels of government. The focus of these activities at all levels will be the tremendous increase in population and growth of our metropolitan areas. Urban problems have and continue to pose the challenge of finding new and better ways of effectively integrating and coordinating activities of the various sub-systems of our metropolitan areas.

The basic need for this study then is to provide an opportunity for the leaders of one of these sub-systems, education, to deepen their understanding and become more aware of new trends and focuses in comprehensive planning. There is a need for educators to be aware of and involved in comprehensive planning activities so that educational needs and concerns will be adequately and fairly represented and met.

Education, being one of the most prominent and dominant of society's sub-systems, has both much to contribute and much to gain from cooperative intersystem approaches to comprehensive planning. This is especially true today. For planning, in becoming comprehensive, is focusing upon social needs and desires and is incorporating them into the general context of the comprehensive plan. However, before education or any other part of the "total system" can either contribute to or gain by it, it must first understand what this new comprehensiveness means. For it

is comprehensiveness, in the form of planning, that will eventually help manage the complexity of our social institutions in a harmonious, humanistic manner.

The kinds of local planning activities that are now under way are often inadequate to deal with and solve the complexity of our present problems. As our metropolitan areas continue to grow, many of their developmental problems will be solved only through joint governmental efforts. These joint governmental efforts should provide the framework for planning activities to be carried out on a regional scale. This regional approach to planning should provide the framework to incorporate and coordinate the various activities of all the sub-systems within that region.

The focus of the 70's will push for the state to be the central agency in comprehensive planning, because of the unique vantage point it has in viewing various regional developments within its political boundaries.

It is especially meaningful at this time to focus upon education as a sub-system that is directly involved within the planning process, for the educational needs of the states show many of the causative factors which increase the necessity of state-wide comprehensive planning within their political boundaries. Education by virtue of the Nation's Constitution has always been a state function. Therefore educational proposals and recommendations,

to meet the needs of the people and to provide truly equal educational opportunity, may well have to be incorporated into a state educational plan. This then provides a very basic foundation for including educational planning within the context of the larger planning process.

The task now is to give the different sub-systems a general understanding as to how better planning could coordinate their various efforts into a comprehensive endeavor. It is hoped that this understanding will enable education to make valuable contributions to these comprehensive planning efforts, so that in the end, the resulting comprehensive plan will truly include the means for implementing educational needs and desires in a practical, realistic and humanistic manner.

The Purpose of This Study

The purpose of this study is to establish a conceptual framework to enhance educators' understanding and awareness of the comprehensive planning process. This framework will be established from the identification of selected factors, most commonly utilized by the planning profession, while studying or working within a given area, at various governmental levels.

The social, economic, physical and political forces of change at work among the various sub-systems of society today are immense. The planning profession attempts to

coordinate and synthesize the various elements of society and guide their future direction and growth. Education, being one of the most prominent and dominant of society's sub-systems, must be aware of this future direction and growth.

Also, it is hoped, through the increased understanding and awareness of comprehensive planning that educators should acquire from this framework, a bridging effect might evolve between the two professions. Today, society is demanding that both professions become more socially oriented. This bridging should help both comprehensive planning and education to coordinate their efforts so that future trends and developments may be more socially oriented while becoming more comprehensive in nature.

Educational Implications

The most significant educational implication for this study is that presently both planning and education are in transitional phases going from ad hoc planning activities to those more comprehensive in nature. A review of the educational planning literature and a review of educational planning activities reveals that most planning in education is carried out on an ad hoc basis. When planning information of a comprehensive nature is available, it is usually found in journals or publications, international in nature, or in reports

being made on comprehensive educational planning activities in a foreign country.

Education is affected by the social, political, economic and environmental activities and changes in society that planners study and influence. If present trends and policies continue, these activities will exert even greater influence on educational plans and policies than ever before. The time has now come when the educational leaders of this and all states must become involved in comprehensive planning activities.

Present educational policy shows that educators take little or no part in planning activities other than those which are concerned with expanding building programs and passing millage elections. These activities are necessary, but are only part of the total picture.

There is widespread agreement today in academic and governmental circles that public decisions regarding education should be made "planfully" rather than ad hoc. . . . It is widely agreed that public decisions regarding education should take into account policies and developments in other sectors of the society and vice versa.¹

As education is ad hoc in relation to planning, so are many of the present activities of planners and planning offices. In order to truly work "planfully," strong, effective coordinating agencies are necessary. These

¹C. A. Anderson and Mary Jean Bowman, "Theoretical Considerations in Educational Planning," in Educational Planning, ed. by Don Adams (Syracuse: Syracuse University Press, 1964), p. 4.

coordinating agencies are, and will become more so, offices of planning coordination. In the future, if educational planning fiscal and physical in nature is to become effective, it may have to be closely tied to this coordinating agency.

The trend at various governmental levels has been to try to tie educational endeavors closely to the system as a whole, but such an activity is difficult. The World Year Book of Education, 1967, asks:

Why do most highly industrialized countries of the West seem somewhat reluctant to adopt educational planning wholeheartedly? Is it because the patterns are set and rigid, the administration inflexible? Or is it because the task really is too complicated and difficult?²

To view and understand educational planning we must first decide what one needs to know about it and what its new focus is. The main thrust of educational planning today is that it should be comprehensive rather than piece-meal. But more significant and complicated is the new dimension: it must be integrated with the rest of society's sub-systems, through intergovernmental activities.

In short, three major new dimensions were added to the older concept of educational planning: Comprehensiveness of coverage, a much longer time perspective, and more conscious and

²George Beneday, ed., Educational Planning, The World Year Book of Education (New York: Harcourt, Brace & World, 1967), pp. 6-7.

detailed integration with national economic and social development.³

Comprehensive educational planning is gaining support rapidly especially in the metropolitan areas. As our metropolitan areas grow and become more complex, added pressures are placed upon their educational systems. Educators must acquire a clearer understanding of what the metropolitan areas currently are and may soon become. The 1968 Yearbook of the National Society for the Study of Education was devoted to this task. It indicated that:

. . . the educational system must move . . . toward intersystem co-operation with other social systems throughout the metropolitan area. . . . There appears to be much room for educators to take the initiative in becoming associated with metropolitan-level, intersystem co-operative activities, to which they have much to contribute and from which they have much to gain.⁴

Public schools being educational institutions, as well as governmental institutions, must become involved in, if not lead, intergovernmental endeavors toward comprehensive planning.

The U. S. Commissioner of Education, James E. Allen, Jr., is a strong advocate of this type of

³Philip H. Coombs, "What Do We Still Need to Know About Educational Planning?" in Educational Planning, The World Year Book of Education, ed. by George Z. Beneday (New York: Harcourt, Brace & World, 1967), pp. 59-60.

⁴Daniel Levine and Robert J. Havinghurst, "Social Systems of a Metropolitan Area," in Metropolitanism: It's Challenge to Education, The Sixty-seventh Yearbook of the National Society for the Study of Education, ed. by Robert J. Havinghurst (Chicago: The University of Chicago Press, 1968), pp. 68-70.

planning, ". . . he is adopting the Nixon theme of consolidating, improving, and better coordinating existing programs and approaches."⁵ He is a strong advocate of interagency cooperation and coordination. He feels the federal government's support for education should be much greater, and has created a deputy post for planning, evaluation and research.

Directly related to better educational planning are Title IV and Title V of the Elementary and Secondary Education Act of 1965 (P.L. 89-10). Title IV called for the establishing of nineteen "regional laboratories" across the country to define the concerns and needs of the area being served, and to help the different areas improve educational practices. These laboratories are certainly of a broad comprehensive nature functioning on a regional basis. Title V provides grants to strengthen State Departments of Education. This Title should give educators financial resources to obtain the needed information to plan in a more comprehensive manner.

In summary, the federal focus seems to be one of continued involvement while at the same time demanding more responsibility and accountability. It seems that one approach to becoming both more responsible and more

⁵Richard H. DeLone, "Cool Man in a Hot Seat," Saturday Review, September 20, 1969, p. 69.

accountable is through better educational planning at the state level.

The states will continue to be an indispensable part of the system for a number of old reasons and for a number of new ones. The state has ample powers and financial resources; it exists, therefore it will be used. It will increasingly be called upon to perform the functions of regulation, leadership, and technical and financial assistance and to remove archaic restrictions on educational administration. With no sign of metropolitan government in sight, the governor's office and the legislatures will increasingly serve as a place of arbitration and as a medium for developing understanding among suburban and city dwellers of their common interest in meeting the wide-ranging and disparate educational needs of citizens.⁶

As an example of the circumstances facing one of the states, Michigan enters the 70's with forty-one per cent of its total state budget appropriated for educational opportunities.

The state has as one of its principal responsibilities the maintenance of an educational system specifically designed to foster a level of intellectual development and occupational competence relevant to the needs of this day and the future. This objective obviously requires⁷ systems and programs amenable to change. . . .

In order to accomplish this, Michigan, like all other states, needs educational planning of a

⁶Norman Beckman, "Metropolitan Education in Relation to State and Federal Government," in Metropolitanism: It's Challenge to Education, The Sixty-seventh Yearbook of the National Society for the Study of Education, ed. by Robert J. Havighurst (Chicago: The University of Chicago Press, 1968), p. 198.

⁷Budget Message of the Governor for the fiscal year 1970-1971, William G. Milliken, Governor of Michigan, p. 25.

comprehensive nature. This can become reality through better communication and cooperation among the various educational and social institutions. It is also necessary to coordinate these efforts with the units of government, the legislature and the general public.

The State of Michigan has made recommendations for better state planning activities, comprehensive and regional in nature. Likewise, educational studies were conducted and recommendations were made for better educational planning, also comprehensive and regional in nature.

The most comprehensive study of elementary and secondary education in Michigan was authorized under Public Act 1966 No. 285. The Michigan School Finance Study, better known as the "Thomas Report," deals with the planning process of education. Terms like master plans, coordinating activities and interagency cooperation are constantly cited. The report states that:

A great deal of educational planning is carried out in this country, but by many different agencies and with a minimum of coordination. At least until recently, educational planning has been haphazard, local, and restricted to individual school districts rather than state school systems.⁸

The following excerpts taken from the "Thomas Report" (pp. 294-347), emphasize the need for this study through

⁸J. Alan Thomas, Michigan School Finance Study, School Finance and Educational Opportunity in Michigan (Lansing: Michigan Department of Education, 1968), p. 293.

the educational implications that may be derived from planning. To plan better educationally, the report concluded that planning requires efficient governmental organization. The existence of multiple levels of government and the presence of overlapping jurisdictions creates a duplication of effort and sometimes a conflict of interest. The metropolitan areas are a perfect example of this. Regional rather than local planning is increasingly essential in these areas. For regional planning to be successful, it must also be long-term planning.

In order for this type of planning to become possible, school districts must be organized efficiently, so services may be effectively provided. This is true of all districts no matter what the size. If services to students are to be provided effectively and efficiently, leadership must be provided in making this end possible. This leadership would attempt to coordinate educational efforts between or among districts so that in the end true equality of educational opportunities would be available for all youngsters of the state. This would entail expansion and development of the Departments of Education in the states especially in relating and using new approaches to planning.

School systems and states have traditionally used individual demands for additional education as the basis for planning, but today a more sophisticated economic approach is being employed.

[This approach] to planning requires the services of competent economists and related personnel, and is most appropriately carried out at the state level.⁹

This report strongly emphasizes the importance of educational decision making in relation to educational practices and programs. For new approaches to educational planning to take place, it is necessary that decision making powers be given to regions or the state as is appropriate to the level of decision-making necessary to implement educational programs most efficiently and effectively.

The "Thomas Report" further recommended that a commission be appointed to develop a master plan for school district reorganization, and that urban education be studied at the state level to coordinate interagency activities. For all this to occur, planning is a key factor.

One of the most recent and controversial educational documents in Michigan is the Report of the Governor's Commission on Educational Reform (September 30, 1969). For the purpose of this study, two of the recommendations are significant. Concurring with the "Thomas Report" is the recommendation that: "the constitution be amended to enable the Legislature to collect a uniform statewide property tax for school operating purposes . . . "¹⁰

⁹ Ibid., p. 320.

¹⁰ Report of the Governor's Commission on Educational Reform, William G. Milliken, Governor of Michigan, September 30, 1969, p. 10.

Of prime importance in relation to the need for educational planning and its implications is the recommendation concerning administration.

State Administration

To fix responsibility for operation of the Department of Education, we recommend that the existing State Board of Education structure and the position of State Superintendent of Public Instruction be abolished by Constitutional amendment and replaced by a State Director of Education appointed by the Governor, subject to Senate confirmation.

Regional Administration

To strengthen further the organizational structure and responsibility of the State Department of Education, we recommend that intermediate school districts be discontinued and replaced by 10-15 regional education areas.

Further Reorganization of Local Districts

To strengthen the regional administration, and to provide wider educational opportunities, we recommend further consolidation of local districts.¹¹

The "Thomas Report" and the "Governor's Educational Reform Package" emphasize the educational significance comprehensive planning will have in the future for Michigan, especially at the elementary and secondary school level.

Institutions of higher education also seem to be heading in this direction. In a statement issued February 26, 1970, the Michigan Council of State College Presidents said:

It is the view of the Council of State College Presidents that effective statewide planning and coordination for higher education, including the

¹¹Ibid., pp. 7-8.

community colleges, is essential if the State of Michigan is to achieve the highest quality educational program for its citizens. The long-standing tradition of institutional autonomy in Michigan's universities and colleges has provided the basis for one of the finest systems of public higher education in the United States. That tradition should be preserved and strengthened while at the same time providing for more effective educational planning and coordination.¹²

In summary, Michigan, at the State level, is moving toward comprehensive educational planning in order to increase her responsibility and accountability in educational practices. Several big questions remain to be answered. What view will educators take of comprehensive planning activities? Will, in fact, the educational leaders of Michigan be involved in these activities? Or, will the focus and direction given educational planning activities be other than comprehensive in nature?

At present the central focus of educational planning seems to be strongly centered around the Program Planning Budgeting System approach (PPBS). This increases fiscal accountability, but it should become part of the total planning process, and not the process itself.

The conceptual framework of PPBS is keyed upon planning and includes objectives, alternatives, inputs, costs, time dimensions, outputs, analysis, and evaluation. It bears repeating that

¹²Statement paper, Michigan Council of State College Presidents, Richard L. Miller, Executive Director, February 26, 1970.

PPBS is oriented toward planning for output - in education this means planning for learning.¹³

Should the aims of educational planning be, in fact, planning for output? Is planning for output, planning for learning? Is it possible for societal goals to be incorporated into a systems approach? Or will economic dictates become the dominant factor?

The widely acclaimed new approaches to educational planning are really evolved refinements of budgeting principles observed for some decades. [PPBS] . . . Decisions on education cannot and should not always be made on solely economic grounds, even if technics were available to do so.¹⁴

The reasons for education and other sub-systems to engage in comprehensive planning activities are varied and long. The one dominant theme, however, seems to be that until recently educators have not utilized the planning process. The need is here and the educational implications of this need are great. If "comprehensiveness" is not the goal of the educational planner, economic progress may become the main objective. If economic responsibility and accountability become the main objectives, then education, in humanistic terms, may become non-existent. In a complex society, perhaps the only

¹³George A. Chambers, "PPBS - New Challenges and Opportunities for the Principal in Financial Planning and Management," North Central Association Quarterly, Vol. XLII, No. 4 (Spring, 1968), 306.

¹⁴Calvin Grieder, "Program Budgeting may not Solve Your Planning Problems," Nation's Schools, Vol. 81, No. 6 (June, 1968), 8.

way to preserve humaneness and individual freedom is to work cooperatively through comprehensive planning toward humanistic goals.

Assumptions

The basic assumptions necessary for this study are:

1. That our social systems are continually growing, becoming more complex and specialized. As this process continues, a general synthesizing activity is needed to coordinate the efforts of the various sub-systems. That activity is planning.
2. That planning, in becoming comprehensive, is focusing on social needs and desires while engaging in the planning process.
3. That education is one of those social sub-systems that can help the comprehensive planning process understand and meet the social needs and desires of society.
4. That historically this nation never has taken any form of comprehensive planning seriously.
5. That upon entering the decade of the 70's our metropolitan regions will continue to grow.
6. That educational planning is hampered by multi-levels of government.

7. That in order to maintain a balance between resources and people, comprehensive planning must be taken seriously.

Thus the underlying theme of this study is the assumption that the 1970's will find added pressures placed upon our metropolitan regions. The planning talk of the 1960's will out of necessity become the realities of the 1970's. Education, being one of the most important segments of society, will play an increasingly important role. As its role increases so will its responsibility and accountability. The demands and questions asked of education will be answered only through better educational planning. And better educational planning will evolve finally as part of a total comprehensive planning effort. It is assumed, therefore, that those who are guiding the educational planning activities must understand and appreciate the comprehensive planning process as a whole.

Questions

The significant questions to be answered in this study are:

1. What are those factors utilized by the planning profession that have direct bearing on an area's composition and its future development?
2. What do these factors tell us about the area?

3. How can these factors be utilized in establishing a conceptual framework within which educators may choose to work to enhance their awareness of planning?
4. What are the educational implications that may be derived from using such a framework?
5. How can this framework help to bring about a better understanding and cooperation between educators and planners as they move toward achieving the optimal goals for an area, in a practical, realistic manner?

Design of the Study

This study is divided into two parts. First: the planning literature will be reviewed to indicate the contemporary focus and trends of the planning profession. This review will also be used to identify certain factors, and their meanings, utilized by the planning profession. These factors are the basics needed by educators to better understand the present conditions and future projections of a given area.

Second: these identified factors will then be used to establish a conceptual framework to increase educators' understanding of comprehensive planning so that they may better utilize the process to increase their awareness of present conditions and future developmental trends of

their area. Such insights should make the performance of their daily responsibilities and implementation of educational change more meaningful. This understanding and utilization should also tie the direction of the two professions closer so that the planning efforts of both might truly be more comprehensive in nature.

Limitations

The limitations of this study are:

1. That it focuses upon just one of the areas educators must become aware of today, namely, the comprehensive planning process.
2. That the focus of education and educational planning is people and this study deals with them only indirectly. It is a way of providing a better understanding of those complex institutions in which people must exist.
3. That the present focus of educational planning is the Program Planning Budgeting Systems (PPBS) approach and this study does not deal with this topic.
4. That it may tend to oversimplify, for educators, the complexity of the planning process. This framework is intended to serve only as a guide to help educators understand the comprehensive planning process.

5. That the factors used are identified only, and not tested items.
6. That the effectiveness of this framework will prove successful only when used and tested by educators while working within their service area.
7. That no conceptual framework holds in and of itself the answers to the type of complex problems with which this study deals.
8. That, by its very nature, the planning profession, like education, is in a constant state of flux and change. This framework should not be looked upon to provide an answer but rather to provide guidance in the coordinating and cooperation of the various planning efforts of the two professions, so that the end product will truly reflect social needs and desires as well as economic and physical needs within the existing political framework.

Summary and Overview

To summarize, this study will deal with the establishment of a conceptual framework through which educators may view the present conditions and future development of an area and its educational implications. Although not the central focus, it is also hoped that this study will

serve to make planners more aware of the educational situations and problems created as an area changes and develops.

As our social world becomes more and more complex and specialized, a generalist is needed to synthesize its systems and institutions. By focusing on the complex whole (planning) and one of its parts (education), it is hoped that the two academic, non-disciplinary approaches will prove meaningful toward a better understanding of the types of coordinating and cooperative efforts so needed today.

Chapter II, "Review of the Literature," will review the contemporary planning literature to establish the current trends and directions of planning. It will serve to establish the current principles and practices of the planning profession.

Chapter III, "The Meaning and Significance of the Identified Factors," will continue reviewing the planning literature, but with a different focus. This chapter is intended to be more specific in identifying and explaining the basic studies, data collections and special approaches, which lead to the development or revision of policies, plans and programs. It will also discuss the tools for implementation utilized by the planning profession.

Chapter IV, "The Establishment of a Conceptual Framework," will establish a conceptual framework which will enhance educators' understanding of comprehensive

planning. It will provide a practical breakdown of the planning process which educators may utilize in their service area to understand more clearly and, hopefully, to become more involved in the planning process, so that the educational goals of the area may be met within the context of the larger whole.

Chapter V will summarize this study. The conclusions will answer the questions posed in Chapter I, and the educational benefits to be derived from the use of this study will be discussed. Suggestions for further studies will also be included.

CHAPTER II

REVIEW OF THE LITERATURE

Planning: Definition, Trends and Directions

A review of the literature in both planning and education failed to reveal any studies that had as their central focus an attempt to delineate and clarify the planning profession and process specifically for educators with the ultimate end of helping educators to involve themselves in the comprehensive planning process. Therefore, the review of the planning literature will focus on those aspects of the planning profession which are of special significance to educators today.

This chapter, then, will define and discuss planning and the planning profession, current trends and directions of the planning profession, specifically significant to educators. Political and governmental implications will also be discussed. Finally, in order to clarify these elusive entities, specific recommendations, proposals and activities currently occurring in the State of Michigan will be cited.

To define a profession is a difficult task. For no matter what the final terminology decided upon, someone

will disagree. Seeley¹ emphasizes this point by saying that the complexities of what is actually intended by planning "are a clouded clarity." Whatever definition is adopted, however, must both mark a position and define a strategy. The position must be reasonably defensible, and the strategy reasonably productive.

Planning is generally defined today as the work of those engaged in efforts within a delimited geographic area, ranging from a neighborhood to an international region. It serves a democratic society by outlining programs to identify and order the physical, social, and economic relationship essential to the attainment of the goals of that society and to coordinate the means by which these goals are achieved.²

One of the most frequently cited and most comprehensive definitions of planning is Y. Dror's, "Planning is the process of preparing a set of decisions for action in the future, directed at achieving goals by optimal means."³

¹John R. Seeley, "What is Planning? Definition and Strategy," Journal of the American Institute of Planners, Vol. 28, No. 2 (May, 1962), 91.

²American Institute of Planners, Report by AIP Committee on Restatement of Institute Purposes, March 15, 1966, AIP Newsletter, April, 1966, p. 3.

³Yehezkel Dror, "The Planning Process: a Facet Design (1)," International Review Admin. Services, Vol. 29, No. 1 (1963), 46-58.

For purposes of clarification in understanding and studying the complexity of the planning process, Dror divides the definition into seven different elements.

(1) Planning, being a process, is a continuous activity taking place within some time dimension and requiring some input of resources and energy. (2) Planning is a process of preparing a set of decisions to be approved and executed by some other organs. (3) The process involved is one of preparing a set of interdependent, sequential and systematically related decisions. (4) In planning, the set of decisions for action is directed purely towards action and execution. They are not concerned with secondary results such as better decision making, improving public relations or training in teamwork. (5) Since the process takes place in the future, it introduces the elements of prediction and uncertainty which condition all aspects, problems and features of planning. (6) The action involved must be directed at achieving goals. In order to operate, the planning process must define goals.

This does not mean that the planning process begins to operate with clearly defined objectives. Rather, in most cases, the first phase of the planning process consists in the formulation of operational planning objectives on the basis of rather ambiguous and undefined goals set before the planning process by some other, in most cases, processes.⁴

⁴Ibid.

(7) The last element of Dror's definition states that these goals must be obtained "by optimal means." The planning process itself should suggest how these goals should be obtained.

This term "process" is an old and well-known term to the social sciences, but it still has certain dynamic and constantly changing qualities. In contemporary planning thought, its usage suggests

a sequence of action which begins with establishing certain goals, involves certain decisions as to alternative ways of achieving these goals and eventually takes the form of steps for carrying out decisions, followed by evaluation and perhaps a new sequence of action.⁵

Bolan concurs with this definition of process and extends it into the realm of social and governmental involvement when he states,

A number of recent probes into the nature of the planning process suggest a new understanding of social movements, governmental processes, alternative "styles" of planning and, indeed, the very nature of cognitive processes and rationality.⁶

Because of the involvement and nature of the process, new understandings are constantly needed. The American Institute of Planners' primary concern until

⁵F. Stuart Chapin, Jr., "Foundations of Urban Planning," in Urban Life and Form, ed. by Werner Z. Hirsch (New York: Holt, Rinehart and Winston, Inc., 1963), p. 224.

⁶Richard S. Bolan, "Emerging Views of Planning," Journal of the American Institute of Planners, Vol. 33, No. 4 (July, 1967), 233.

1967 was that planning should be a ". . . unified development of urban communities and their environs . . . as expressed through the determination of the comprehensive arrangement of land and land occupancy and the regulation thereof."⁷

The shift in definition, then, is from one which centers upon the physical arrangement and regulation of land and land occupancy to a "new comprehensiveness" that involves and demands new understandings of all social movement, economic development, environmental effects and political implications. Present-day societal demands are placing the emphasis on the social sphere.

Emphasis on "social planning" for new and old cities, areas, and regions, corresponding to the emphasis in recent years on physical planning, can be expected. Growing interest . . . will encourage more experiments in which physical planning is subordinate to social planning--but not without intense arguments and infighting among the professionals and politicians involved. However, as social planning begins to demonstrate its capacity to smooth social transitions and operations it will become more useful and used.⁸

For social planning to succeed, Perlman assumes that it

⁷Willard B. Hansen, "Metropolitan Planning and the New Comprehensiveness," Journal of the American Institute of Planners, Vol. 34, No. 5 (September, 1968), 295. See also American Institute of Planners, Background Paper - The Role of Metropolitan Planning, September, 1965.

⁸Donald N. Michael, "Urban Policy in the Rationalized Society," Journal of the American Institute of Planners, Vol. 31, No. 4 (November, 1965), 283.

. . . will require, indeed will consist of, close working relationships among planning professionals and groups now concerned in somewhat uncoordinated fashion with economic, social, physical, and political matters. It is not likely that social planning will emerge fullgrown in the immediate future from the matrix of jurisdictions and disciplines now engaged in planning. But movement in that direction can be facilitated if attention is given to strengthening cooperation between one element and another in the matrix.⁹

Perloff's expansion of "additive" planning activities will serve as a basis for summery.

From (1) an early stress on planning as concerned chiefly with esthetics, planning came to be conceived also in terms of (2) the efficient functioning of the city--in both the engineering and the economic sense; then (3) as a means of controlling the uses of land as a technique for developing a sound land-use pattern; then (4) as a key element in efficient governmental procedures; later (5) as involving welfare considerations and stressing the human element; and, more recently, (6) planning has come to be viewed as encompassing many socio-economic and political, as well as physical, elements that help to guide the functioning and development of the urban community.¹⁰

A significant trend in planning, then, has been this shift from physical planning to more social planning.

Parallelling this need for social planning has been the need for better metropolitan planning of a regional nature to cope with our growing urban population.

⁹Robert Perlman, "Social Welfare Planning and Physical Planning," Journal of the American Institute of Planners, Vol. 32, No. 4 (July, 1966), 237-241.

¹⁰Harvey S. Perloff, Education for Planning: City, State, and Regional (Baltimore: John Hopkins Press, 1957), p. 12.

The "city," as we conceive it, no longer exists.

Gottmann's twenty-year study of the northeastern seaboard concludes,

. . . we must abandon the idea of the city as a tightly settled and organized unit in which people, activities, and riches are crowded into a very small area clearly separated from its non-urban surroundings. Every city in this region spreads out far and wide around its original nucleus; it grows amidst an irregularly colloidal mixture of rural and suburban landscapes; it melts on broad fronts with other mixtures, of somewhat similar though different texture, belonging to the suburban neighborhoods of other cities.¹¹

Bollens and Schmandt concur.

The metropolitan area is in effect a new community. Its boundaries often are hard to define. In some instances they change and expand frequently. The area ignores old geographic boundaries, jumping over and around rivers and land masses. It ignores the political lines of districts, villages, towns, cities, counties and states.¹²

Friedman and Miller state that

The inherited form of the city no longer corresponds to reality. The spatial structure of contemporary American civilization consists of metropolitan core regions and intermetropolitan peripheries. The former have achieved very high levels of economic and cultural development at the expense of the latter. . . . Current and projected trends in technology and tastes suggest that a new element of spatial

¹¹Jean Gottmann, Megalopolis (New York: The Twentieth Century Fund, 1961), p. 5.

¹²John C. Bollens and Henry J. Schmandt, The Metropolis: Its People, Politics, and Economic Life (New York: Harper and Row, 1965), p. 33; Guiding Metropolitan Growth (New York: Committee for Economic Development, 1960), p. 13.

order is coming into being--the urban field--which will unify both core and periphery within a simple matrix.¹³

As the metropolitan area ignores old boundaries, it establishes a new area referred to today in planning literature as a region. The idea of a region is not new to planning, but the definition is as nebulous as the description of the metropolitan area. Friedmann defines a region as, "an elusive entity whose boundaries cannot be drawn with precision . . . and whose spatial configuration will change historically and according to the purpose served."¹⁴

For purposes of this study, a metropolitan area and a region will have the same meaning and are defined as that area which has as its central focus a metropolis with its supra-urban space, the metropolis' surrounding area.

The key, then, to regional planning is the spatial economic arrangement of multidimensional human resources, guided by national influences.

Friedmann cites at least three common features of regional planning.

¹³John Friedmann and John Miller, "The Urban Field," Journal of the American Institute of Planners, Vol. 31, No. 4 (November, 1965), 312-20.

¹⁴John Friedmann, "Regional Development in Post-Industrial Society," Journal of the American Institute of Planners, Vol. 30, No. 2 (May, 1964), 84.

1 Economic development appears as a leading objective . . . Regional planning is therefore concerned with long-term per capita gains in productivity and with the welfare implications of given income distributions among areas.

2 Regional planning is not, in most instances, an expression of cultural regionalism, . . . On the contrary, regional planning usually attempts to break down the separateness of regional structures and to integrate them functionally into the national economy. In this sense, regional planning works with a dynamic concept in which the region appears as a constellation of social and economic forces subject to external influence and change.

3 The far-reaching effects of many regional problems brings them within the scope of national policy and planning. Regional economic growth is generally a matter as much of national as of local policy determination.¹⁵

Friedmann elaborates by saying that "in an economy like that of the United States, where service industries predominate and where spatial immobilities are progressively losing their importance, regional development is primarily a function of national influences."¹⁶

The cities remain the focal point of the region and greatly influence the regional development. Doxiadis, in discussing the city, says,

We deal with five elements in our cities. The first element is Nature, we tend to overlook it and this is why we have polluted air. The second element is Man himself, as an individual with all his values. The third element is Society, formed by Man; while the fourth is the Shells, buildings, houses and other man-made structures. The fifth

¹⁵John Friedmann, "Introduction," Journal of the American Institute of Planners, Vol. 30, No. 2 (May, 1964), 82.

¹⁶Friedmann, "Regional Development in Post-Industrial Society, p. 84.

element is the Networks, which we also tend to overlook and we often speak of Networks in terms of transportation only. We have gradually learned through experience that we should pay much greater attention to the whole system of Networks, physical and managerial, by which our society operates. . . . For example, our cities are at an impasse, because of a complete lack of understanding of the importance of the systems of networks we build.¹⁷

The dynamic qualities of the city establish the region. Doxiadis illustrates this in his discussion of the Detroit urban area and emphasizes the need for better regional planning practices.

. . . this urban area operates as one unit consisting of 37 counties; 25 in Michigan, 9 in Ohio (including the whole Toledo area) and 3 in Canada. People commute daily within this area and identify with the nearest city through many functions of commerce, trade, communications, etc. In this way the area of influence of each major urban system can be defined. How can we expect this structure initially designed for two hundred thousand people to serve 7 1/2 million people? We cannot expect it, and it does not work. . . . As a result of this, the city-structure has to be changed.¹⁸

A study of the area between Detroit and Chicago suggests that one city might be established here before the year 2000. A study of the area between Detroit and Flint reveals that more than 55% of the land between these two cities has been purchased and committed for urban purposes.

¹⁷C. A. Doxiadis, "Preparing Ourselves for the City of Tomorrow," EKISTICS, Vol. 27, No. 161 (April, 1969), 274.

¹⁸Ibid.

We must revise our thinking and start building for the future on the basis of what is happening now and what we should expect to happen. [Doxiadis emphasizes the point that] Urban forces proceed much more quickly and much earlier than the physical construction of the city. [He reminds us that] We must be prepared for very great disappointments for as long as we are unable to face the system as a whole, and are thus unable to remodel it in accordance with the needs of our society.¹⁹

There is little question that planning agencies will have to focus much of their attention on regional aspects in the near future. There remains, however, much work to be done in the construction of techniques for regional planning.

Public policy has thus become concerned with the manner and pace of economic development of sub-national areas, [regions] . . . But the conceptual structure necessary for the intelligent making of policy is in its infancy. The social sciences, principally economics and sociology, have been laggard in taking notice of space; while geography, which has always dealt with space, has lacked analytic power. . . . If our knowledge were more advanced, we could write a textbook, epitomizing and codifying principles in ordered cadences. The time may come, in a decade or two, when this can be done; but the topic is an urgent one, both for the technician and for those charged with responsibility for making decisions.²⁰

We must now discuss the current recommendations and proposals needed for regional planning to develop the policies which will implement necessary and effective change.

¹⁹Ibid., pp. 275-278.

²⁰John Friedmann and William Alonso, eds., Regional Development and Planning (Cambridge: The MIT Press, 1964), p. 1.

Planning: A Governmental Function

Planning today is considered a governmental function at the municipal, state and federal levels. Current planning literature is filled with recommendations and proposals supporting intergovernmental involvement of the planning profession, especially in those processes concerned with regional planning. When planning of a regional nature is discussed as a governmental function, a challenge is posed to the federal system. The federal system was designed to distribute the powers of collective decision making among its parts. Regional planning, to become successful and effective, must seek to integrate powers and coordinate the parts. With this in mind, this section of the chapter will serve to review some of the pertinent recommendations and proposals on how regional planning might effectively be integrated into governmental functions. The problem is how to develop means to coordinate intergovernmental activities within a region. The state is in a unique position to contribute to this.

The growing complexity and interaction of decisions concerning development made at different levels of American government make coordination more difficult and also more necessary . . . The states, with their inherent sovereignty and strong political powers, are important building blocks which must be used in the nation's development process.²¹

²¹Robert S. Herman, "State Planning and Development in a Federal System," in Regional Accounts for Policy Decisions, Committee on Regional Accounts, ed. by Werner Z. Hirsch (Baltimore: Johns Hopkins Press, 1966), p. 132.

We are aware that,

State Planning in the United States is entering upon a new phase. After years of concern with resource conservation, industrial promotion, and local planning assistance, it is reaching out boldly in the direction of comprehensive economic and physical development, with a focus on the metropolitan region.²²

For this comprehensiveness to develop effectively, however, changes in working relationships between governmental units must occur.

Central to all else is the relation of the state government to its local subdivisions. Since all municipalities are "creatures of the state," the nature of local government is determined by the state. The fiscal power of local government is determined by the state. The jurisdictional boundaries of local government units are determined by the state. The allocation of functional responsibilities between state and local parts of the governmental system is determined by the state. A state constitution, therefore, is a constitution for all local governments in a state as well as for the state itself.²³

The modernization of state governments is essential if effective regional planning is ever to occur.

Because of the increasing interdependence of local jurisdictions, the role of the states must grow if they are to be strong and effective partners in the federal system. The states should encourage greater cooperation and coordination among local governments in solving metropolitan problems. In many areas

²²John Dyckman, "State Development Planning: The California Case," Journal of the American Institute of Planners, Vol. 30, No. 2 (May, 1964), 144.

²³Alan K. Campbell, "A New Constitution for New York," in Modernizing State Government, Proceedings of the Academy of Political Science, Vol. 28, No. 3, January, 1967, p. 9.

taxpaying ability is greatest in the suburbs but needs are greatest in the central cities.²⁴

A whole new philosophy is required of state governments in coordinating, communicating and sharing responsibilities before regional planning is possible under federalism.

A review of planning legislation of the past five years shows that many states are centralizing statewide planning activities in the Office of the Governor. The same review also reveals a marked increase in state legislative activity in the field of regional and metropolitan planning. There can be little doubt that planning is now considered a governmental function. One of the most significant reasons for this has been "701 funds." These funds are federal monies offered to the states for planning activities. They are authorized under the Housing Act of 1954 (Public Act 560, Title VII, Section 701).

Legislative activity starts in the form of proposals and recommendations. One of the basic and most frequently cited documents on intergovernmental recommendations is State Responsibility In Urban Regional Development.

²⁴ A Fiscal Program for a Balanced Federalism, A statement on National Policy by the Research and Policy Committee, Committee for Economic Development (New York: 1967), p. 30.

This document deals with

the appropriate roles for the different levels of government; the various approaches to urban regional development; the leadership role of state government in forward planning and in coordination of state, local, and federal activities in urban regional development; and constitutional and statutory provisions needed for the exercise of such state leadership.²⁵

To assist the states in resolving the problems of urban regional development, the committee reported to the 1962 Annual Meeting of the Governor's Conference that

-Urban growth presents one of the most important political and governmental problems of our day . . . An increasing number reside in the metropolitan suburbs rather than in the central cities. There are a multiplicity of overlapping governmental units and a fragmentation of responsibilities.

-It is expected that the areas and populations within urbanized areas will continue to increase.

-Solutions to America's countless urban regional development problems can only be accomplished through joint governmental effort.

-The state is in fact, an established regional form of government. It occupies a unique vantage point, broad enough to allow it to view developments within its boundaries as part of an inter-related system, yet close enough to enable it to treat urban regional problems individually and at first hand.

-The state's principal task may be to equip local governments with a wide assortment of permissive powers.

-The advance consideration of future problems--planning--is the means by which the stage can be

²⁵State Responsibility In Urban Regional Development (Chicago: The Council of State Governments, 1962), p. vii.

set for determining government policies and undertaking public programs. A consistent framework for the social, economic and physical development of our urban areas is needed, based on a total planning effort by local, state and federal governments.

-Local planning activity now under way is of inadequate quality.

-The Federal Urban Planning Assistance Program, under Section 701 of the 1954 Housing Act, has had significant impact on local planning. Originally conceived as a modest attempt to strengthen the concept of urban renewal, the act has been expanded to include federal financial assistance to planning projects in small communities, to metropolitan and regional planning agencies, to federally impacted areas, to state planning agencies, and to economically depressed areas.

-Local units in many states need additional legislative authorization to enable them to organize for planning, to use planning techniques effectively and to administer planning controls.

-The best local planning, even if well coordinated at a regional or metropolitan level, is not in itself adequate unless there is effective planning by the state as a whole. The need for comprehensive statewide planning, relating local and regional needs to state policies, is largely unmet by many states.

-In addition to preparing a comprehensive development plan, a state planning unit should be charged with coordinating statewide physical development programs.

-The traditional home rule concept can be modified to meet current needs by allowing local home rule for strictly local problems and metropolitan home rule for area-wide problems--with the state free to act on problems which transcend county boundaries and which are not soluble through inter-local cooperation.

-Study commissions can be utilized by people residing in metropolitan areas to examine and, if they so desire, initiate action to change their

local government structures so that area-wide needs can be met.

-A new concept is to empower independent metropolitan districts to perform a number of functions, making them multi-purpose in character, thus, in effect, converting them into general governments of metropolitan scope.²⁶

This document has been fundamental in the development of current recommendations which may become legislation in the near future.

The American Institute of Planners' third biennial Government Relations and Planning Policy Conference held in January, 1965, had as its theme, "Emerging Regional Cities of America." The purpose of the conference was to think out the challenges that face the governments of America. Following this conference, the Institute published The Structure of Planning and Regional Development, in which the following recommendations were made.

At the National Level

a. A Presidential Commission should be established to formulate a statement of national interest and goals for urban development.

The Commission should be charged with the analyses and investigation of current urban regional growth patterns on a nationwide basis.

b. The Federal government should accept its responsibility for the comprehensive planning and coordination of Federal programs influencing urban development.

The Institute should support the recommendation of the Advisory Commission on Intergovernmental Relations that all Federal

²⁶Ibid., pp. xvi-xx.

assistance programs for urban development be channeled through the states, provided that the individual states have a demonstrable capability to qualify.

Recommendations at the State Level

a. It is recommended that the American Institute of Planners' National Standing Committee on State Planning be directed to reassess Institute policy on State Planning with regard to the new dimension of state leadership in regional development . . .

b. The states are encouraged to establish agencies for regional development to provide for continuing state leadership in the guidance of regional growth. . . .

It is further recommended that the states, through the Council of State Governments or by individual action, analyze the current effect of state government planning and zoning enabling legislation on regional growth and development.

Recommendations at the Local Level

a. Metropolitan and county planning powers need to be strengthened particularly in regard to broad land development regulations. It is recommended that the states pass legislation requiring the establishment of metropolitan development councils to provide for effective regional action by local governments in standard metropolitan areas consisting of more than one county unit.²⁷

To summarize progress being made in the reshaping of our governmental structure, especially in the metropolitan areas, a recent research and policy statement by the Committee for Economic Development is cited.

Advocates of area-wide government are convinced that the changes they seek will some day materialize. . . . Several developments support

²⁷Emerging Regional Cities, American Institute of Planners, Government Relations and Planning - Policy Conference (Washington, D.C.: 1965), pp. 15-16.

their optimism: (1) federal assistance for the rapidly growing number of metropolitan councils of government and metropolitan regional planning agencies; (2) growing use of county home rule charters in single-county metropolitan areas; (3) adoption by many urban counties of executive-headed governments; (4) interagency--city, state, and federal--coordination through such programs as model cities; and (5) increasing intergovernmental cooperation.²⁸

In reality, "The plain fact is that plans are policies and policies, if they are to be more than pipe dreams, must be politics."²⁹

Time will allow close observation of legislative activities which is the only means of evaluating how far these recommendations and proposals will progress.

Planning Recommendations and Proposals in Michigan

To illustrate and clarify regional planning efforts, specific recommendations and proposals in Michigan will be discussed. Michigan shows many of the causative factors which increase the necessity for comprehensive regional planning. Of special significance is the tremendous increase in population, especially in the metropolitan areas. Table 1 will provide pertinent facts concerning population growth.

²⁸Reshaping Government in Metropolitan Areas (New York: Committee for Economic Development, 1970), p. 42.

²⁹Proceedings - American Institute of Planners, Annual Conference (Washington, D.C.: 1963), p. 183.

TABLE 1.--Population of Michigan's Standard Metropolitan Statistical Areas.

	1960	1970	1980
City of Detroit	1,670,144	1,678,393	1,681,002
Balance of Area	2,092,216	2,495,334	3,110,194
Total Detroit Area	3,762,360	4,173,727	4,791,196
Ann Arbor	172,440	221,832	300,382
Bay City	107,042	108,321	117,330
Flint	374,313	461,643	553,988
Grand Rapids	363,187	404,155	459,453
Jackson	131,994	134,344	144,146
Kalamazoo	169,712	191,659	222,128
Lansing	298,949	360,055	422,254
Muskegon	149,943	155,867	171,506
Saginaw	190,752	215,087	245,221
Total SMSA Population	5,720,692	6,426,690	7,427,604
Total State Population	7,823,194	8,645,200	9,868,000

% of State Population in 10 SMSA's	73.12	74.34	75.27
Detroit SMSA	48.09	48.28	48.55

Sources: 1960 Statistics, U. S. Bureau of the Census;
 1970 and 1980 Projections, Office of Planning
 Coordination, Michigan Department of Commerce
 (Based on 1960 Data).³⁰

³⁰Urban Growth and Problems, Report to Governor George Romney by the Special Commission on Urban Problems, State of Michigan, 1968, p. 2.

-In the twenty-year period from 1960 to 1980, it is projected that 83.47% of Michigan's population will be concentrated in these ten areas, and 48.78% in the Detroit Metropolitan Area exclusive of the City of Detroit.³¹

Population growth alone does not create the multiplicity of urban problems, but it does worsen the urban situation unless positive steps are taken to assimilate the added numbers into a regional development pattern. Therefore, in December, 1966, George Romney, then governor of Michigan, established by Executive Order (No. 1966-14a) a Michigan Commission on Urban Problems, to study the problems of the urban areas of Michigan and to recommend programs for possible action. This commission was financially aided under the Urban Planning Assistance Program authorized by Section 701 of the Housing Act of 1954, as amended.

This commission was divided into six committees; Government Organization and Structure, Planning, Socio-Economic Problems, Housing and Urban Development, Transportation and Finance. The recommendations of the first two committees are of special significance to this study and will be cited.

The Report of the Committee on Government Organization and Structure emphasized that today:

. . . with the influx of population into the existing urban centers and the spilling over of

³¹Ibid., p. 3.

this population into the surrounding countryside, the lines of demarcation - the rural areas - between one urban center and another have been pretty well obliterated.

The Committee recommended that the state should:

- (A) authorize a thorough, in-depth study of the organization, structure, and powers of local government;
- (B) enact a broad, meaningful County Home Rule law;
- (C) establish guides for the creation of multi-purpose authorities and special districts; and
- (D) create a Boundary Commission with the power to disapprove proposed annexations, incorporations, and consolidations which would not provide for new governmental units having an adequate size and tax base for the carrying out of its responsibilities.

Recommendation No. 1

Local units of government in Michigan should be given greater authority than now possessed to join together on common programs.

Recommendation No. 2

Local units of government should be given greater authority to transfer functions to other units of government, subject to agreement of the governing bodies of the units involved.

Recommendation No. 3

The State, through effective legislation, should encourage local government units to form and/or to join voluntary councils of governments.

Recommendation No. 4

The state should establish an office in Washington for the purpose of facilitating relationships between State agencies and Federal agencies.

Recommendation No. 5

- a. The State should require local units of government to submit applications for Federal

grants-in-aid to a State agency or, where appropriate, the regional agency designated by the State for review, comment, and approval.

- b. In strictly local programs, the State should require prior review, comment, and approval of local applications for Federal grants-in-aid only if it contributes a share of the non-Federal costs of the project.

Recommendation No. 6

The State should create a Department of Community Affairs to a. coordinate the urban policies of the State; b. coordinate the activities of various State departments involved in urban matters and having relations with urban units; c. provide technical assistance to local units of government in preparing applications for State and Federal grants-in-aid; d. provide technical assistance to local units in various governmental functions; e. encourage and assist local units of government to transfer functions to other units and/or to develop contractual agreements; f. mediate conflicts between local units of government; and g. carry out operating urban programs that cannot appropriately be assigned to existing State agencies.³²

Report of the Committee on Planning:

Planning can help achieve livability if it is carried on with a full and sensitive awareness of the realities of urban problems and a determination to replace them with urban promise. Such planning must be truly comprehensive in scope, treating all the problems of the urban revolution wherever they are found -

The Committee, therefore, recommends that - the State Legislature provide an effective State planning function in accordance with the following outline:

1. Since the prime responsibility for state planning lies with the Governor, a comprehensive

³²Ibid., pp. 20-33.

State Planning Agency should be established in the Executive Office of the Governor.

2. The State Planning Agency should be charged with the preparation of a State comprehensive development plan through a central State planning staff.
3. The State Legislature should provide an effective regional planning function.
4. The State Legislature should supplement existing county planning legislation to provide effective county planning.
5. The State Legislature should supplement existing municipal planning legislation to provide an effective municipal planning function.³³

Another significant document financially aided by 701 funds suggests the approach Michigan well might follow in future planning activities. In February, 1968, Technical Report No. 14, Planning and Development Regions for Michigan, established the rationale and techniques for comprehensive planning and development on a regional basis.

These regions are intended to be used for two purposes: first, as a regional framework for the coordination of functional planning activities of state agencies, and second, as the focus of planning by regional agencies.³⁴

The following excerpts taken from Technical Report No. 14 conclude that planning and policy-making on a

³³Ibid., pp. 35-41.

³⁴Planning and Development Regions for Michigan, Office of Planning Coordination, Bureau of Planning and Program Development, Executive Office of the Governor, Technical Report No. 14, February, 1968, p. 1.

regional basis is needed because many development problems extend beyond the jurisdiction of local governments, but are sufficiently localized as to preclude effective handling by the state or federal government.

In order to serve effectively as the focus of policy-making at the regional scale, the regions should represent, as closely as possible, regional "communities of interest," rather than arbitrary divisions of the state.

There are presently only two levels of government in Michigan where plans and policies can be translated into action programs--the state level and the local level. Neither of these is well suited to policy development for problems of a regional nature. A new level of planning and policy-making is needed at the regional scale.

Currently, the state must deal directly with hundreds of local governments and ad hoc local agencies. The regional approach could stimulate the greater use of regional planning and development agencies responsible to directly elected local officials.

The end result of the continuing working relationship between the state and regional agencies would be the regional plans and the state comprehensive development process. The planning process would provide basic policy guidelines for development programs of the state, its regions, and its localities, modified from time to time to meet new problems and changing conditions.

The foregoing conceives the state comprehensive planning process as a system of planning in which all three levels--state, regions and localities--participate in the formulation and implementation of policy. "One of the main purposes of the state comprehensive planning process is to provide guidelines for coordinating the varied programs of state government."³⁵

The delineation and establishment of planning regions in Michigan has been defined in this report. However, most important for the purpose of this study is

the type of region most suitable as a focus of planning and policy-making at the sub-state level is the urban-centered region, for cities are not only concentrations of people--they are the regional centers of production, trade, and culture.³⁶

The 14 regions shown on Map 1 vary in size and in number of counties. In most cases, however, the selection of boundaries were considered in relation to the urban influence within that particular region.

The dots on the map show regional centers. Secondary centers are shown by smaller dots, which have some regional significance but to a lesser degree than the primary centers (larger dots). This overview of the Michigan involvement in comprehensive planning activities is indicative of what is happening generally in the field.

³⁵Ibid., p. 16.

³⁶Ibid., p. 21.

STATE PLANNING REGIONS



By way of summary, it must be remembered that whatever definition is chosen for planning, it must be comprehensive in nature, involving the social, economic, physical and political influences of a region. Provisions that enable the profession to serve as a coordinating agency among the various sub-systems of the larger whole must be included. Provisions for evaluation and change to meet new needs should be included, also.

It is hoped that this overview of planning will provide the different components or sub-systems the general understanding necessary to offer them the opportunity of coordinating their various efforts into a comprehensive plan.

It is further hoped that this understanding will enable educators to make valuable contributions to these planning efforts so that, in the end, the resulting comprehensive plan will truly include the means for implementing educational needs and desires in a practical, realistic manner.

CHAPTER III

THE MEANING AND SIGNIFICANCE OF THE IDENTIFIED FACTORS

Introduction

The comprehensive planning process utilizes a number of basic studies, data collections and special approaches to construct the goals and objectives of comprehensive plans. This chapter focuses upon these elements and the tools necessary for the implementation of the comprehensive planning process.

It would be an impossible task, within the scope of this chapter to discuss these elements of the comprehensive planning process in detail, for each of them is extremely complex. But non-planners must be aware of these factors before any framework can be developed.

The initial section will describe basic population, economic, environmental and land use studies and special approaches, utilized by the planning profession. The second section will focus on the development of the comprehensive plan by discussing its developmental objectives and goals. The final section will briefly describe some of the "tools" necessary for the implementation of comprehensive plans.

Population Studies

Analysis and projection of population are at the base of almost all major planning decisions. As measures of the size and density of the various groups within the urban or regional population, they determine the level of demand for future facilities and serve as indices of most urban and regional problems. Since no other local agency normally provides projection data in a way that is useful for these purposes, the responsibility falls to the local planning office. . . . Perhaps the most serious criticism that can be made of most contemporary work by planners in the area of population studies is that little attention is given to the interrelationships between population variables and other factors.¹

There are many types of population studies and projections made today. Comparative forecasting, projection by graphic techniques and mathematical functions, ratio and correlation methods, growth composition analyses and a variety of studies concerned with migration estimates are methods and techniques used. All of these methods of study have both strengths and weaknesses and it is the job of the demographer and the comprehensive planning professional, especially trained in the use of population studies, to determine which method is best suited to the situation being studied.

The problem at hand and the region under study are two of the most influential factors determining the choice of the most appropriate population

¹William I. Goodman and Eric C. Freund, eds., Principles and Practice of Urban Planning (Washington, D.C. : International City Managers' Association, 1968), p. 5 1.

projection method to be used in a given situation. Only in this sense can one technique be judged superior to another.²

To simplify the great complexity of population studies, there are some necessary common elements that they should exhibit to be meaningful to planning. Chapin³ states that they must first estimate the current population, second, have the ability to forecast population and third, be able to analyze the composition and distribution of the population.

All studies for forecasting population either explicitly or implicitly deal with births, deaths and migrations. To be truly useful to comprehensive planners, however, the sophistication level of the studies must go beyond natural increase and migration estimates. Population studies must provide a breakdown into respective age, sex, race and income groupings. It is the comprehensive planner's task then to synthesize these numbers and relate them to the economic, social and political indices of the area in order to obtain a more accurate projection. No matter how sophisticated the study, however, it can never be assumed that population forecasts will be

²Walter Isard, ed., Methods of Regional Analysis: An Introduction to Regional Science (New York: MIT Press and John Wiley & Sons, Inc., 1960), p. 32.

³F. Stuart Chapin, Jr., Urban Land Use Planning (Urbana: University of Illinois Press, 1965), p. 182.

correct. Therefore, most studies indicate both high and low estimates.

Since the end result of comprehensive planning is to give people a desirable place to live, an understanding of Population growth and composition is a basic necessity. Whatever type of study is used, it should have provisions for estimating natural increase and migration and contain a breakdown of respective age, sex, race and income groupings in order to truly reflect the study area, and contribute to an understanding of the needs of the area.

Economic Studies

Economic studies are not as common or as well known to educators as are population studies. But as was established in Chapter II they are of prime importance, especially to the concept of regional development. It is the economy of a region that determines its future growth and development. Economic studies usually have two main purposes or objectives related especially to comprehensive planning. First, they must provide information about the economy of the region so the comprehensive planner may determine goals and objectives. Second, they must provide quantitative estimates concerning future employment opportunities. Employment opportunities have great influence on the amount and breakdown of population a region has or is expected to have.

As planners review economic studies they are usually asking a series of six questions:

1. Why does the community exist?
2. What are the principle causes of change in the economy?
3. What are the most important forms of imbalance in the community economy?
4. How can the imbalances of the economy be remedied?
5. How can economic problem remedies be expressed as community development targets?
6. How do the facts of community economic structure, problems, problem remedies, and targets relate to other community problems and targets in which the planner is involved?⁴

The complexity of conducting an extensive economic study is great. Therefore, these studies are usually done by trained economists. Studies of economic base, input-output, income and social accounting and industrial complex are the most frequently used by comprehensive planners.

The economic base technique is the oldest used to classify an urban region. The region's economy is considered to be composed of an export sector and a residual sector. The first is often called the basic sector because it produces goods and services for export to other regions and thereby brings revenue into the region. The residual sector or local market seeks to provide services

⁴Goodman and Freund, Principles and Practice of Urban Planning, pp. 77-78.

and goods which are produced and consumed within the region thereby recirculating monies within the region. For this reason one of the most important components of an economic base study especially in relation to regional development is the delineation of the area to be studied in order to determine the basic and residual sectors.

A second economic technique for studying an area is the input-output method. Because of the nature of the relationship a region must have to the national economy, the input-output theory is gaining prominence. Designed to study the production and distribution of industries in different regions, the theory simply states that one type of economic activity has a measurable relationship to every other industry in a national economy. To understand the total picture of an economy, detailed information about production and distribution of goods and services for each sector of the economy must be obtained.

Income and social accounting, another method, is one of the newest economic techniques utilized today by comprehensive planners. It is based on the source, distribution, volume and trends of income. It is not unlike input-output techniques for it does account for money exchange between one economic region and the next. It is based on the relationship the regional account has to the Gross National Product. This technique should gain momentum as regional development progresses. It will

also provide the comprehensive planner a better understanding of income and flow of goods within his region and the relationship his region has to other regions.

The only economic system not of a comprehensive nature is Industrial Complex Analysis. This system focuses upon selected industrial complexes which represent a set of activities occurring within a given region. The information planners seek from this type of system are the locational activity patterns of an industrial group and industrial development patterns. It is especially useful in studying the potential development pattern of a region and the employment potential of that region.

These studies, like the population studies, are extremely complex and remain in the realm of the trained economists for final interpretation. These interpretations are extremely important to the planner, for economic trends may not be visual to the untrained observer. Changes in economic activities within a region vitally affect the employment of its residents, and the employment prospectives of a region help determine the population breakdown of the area for which the plans are being developed.

Environmental and Land Use Studies

Due to the growth of metropolitan regions, environmental and land use studies are extremely important today.

The physical development of the land and its use still remains foremost in the minds of comprehensive planners. This is not to say that social planning is secondary but rather emphasizes the point that good physical planning is essential to the social welfare of people living within metropolitan regions.

Land use studies are tied directly to the economic activities and population densities and shifts within an area. Planning for the maximum use of the land depends upon sound economic and population projections to gain an understanding of the types of land needed for all human activities.

Chapin⁵ lists nine types of background studies which furnish information related to the use, nonuse and misuse of urban land which are necessary for decision making in the planning process.

1. Compilation of data on physiographic features, mapping the urban setting.
2. The land use survey.
3. The vacant land survey.
4. Hydrological and flood potential survey.
5. Structural and environmental quality survey.
6. Cost-revenue studies of land use.
7. Land value studies.

⁵Chapin, Urban Land Use Planning, p. 254.

8. Studies of aesthetic features of the urban area.
9. Studies of public attitudes and preferences regarding land use.

The extent to which these types of studies are conducted will determine how detailed and complete the land use plan will be. This plan is a key component in how well the comprehensive plan meets the needs and objectives of the people. Thus planning for economic development through the optimal use of human and environmental resources is one of the greatest challenges comprehensive planners face today.

Transportation

Another key factor tied directly to planning for land use is transportation planning. Today transportation planning is concerned with the total movement of goods, activities and people. The studies focus on all modes of transport and all types of movements. They study the feasibility of intra-city travel as well as the accessibility to outside markets. Thus transportation studies are concerned with private as well as public facilities.

Transportation studies start by looking historically at the development of existing transportation networks and then estimate future requirements by forecasting human movements and activities in relation to future economic development, shipping patterns and recreational desires, which influence travel both to and from their area.

Open Space and Recreation

Much emphasis is being placed on the need for open-space and recreational lands. Comprehensive planners must be aware of and work to incorporate these into the comprehensive plan, especially in our metropolitan regions.

Open space studies should include an examination of available physical resources, human needs and institutional capabilities, and then develop goals and objectives for the comprehensive plan which will meet these human needs and protect the resource base.

Other Public Facilities

Municipal facilities are another important component of land use. They comprise the public lands and buildings that add to the activities and quality of life in an area. Schools, libraries, health facilities, administrative centers, civic centers, and service agencies such as fire, police, sanitation, water, power and sewer systems are studied to provide an understanding of their services so that coordinated activities providing for maximum usage may be incorporated within the scope of the comprehensive plan.

Special Approaches: Appearance and Social Planning

Appearance is an important factor that must be considered in the development of the comprehensive plan. The

aesthetic quality and spatial arrangement of an area is immensely important to the people who must live in and move through the area. Comprehensive planners as well as architects are concerned with the physical arrangement of buildings, streets and parks, etc. within a given location.

The key role the environment plays in the physical, emotional and intellectual development of a child must not be overlooked when planning metropolitan areas. Comprehensive planners today are focusing on recent research findings concerning the effect of environment on humans and are incorporating these findings into their planning efforts.

Social planning aims to gain an understanding of the basic living and working needs of the people within an area so as to reflect provisions for those needs in the goals and objectives of the comprehensive plan. Comprehensive planners must enter the realm of the social scientist in developing an understanding of the social forces and systems at work within the area. This is where educators can become directly involved in the planning process by providing insights into educational objectives and needs. With deeper understanding, the comprehensive planner then seeks new ways to incorporate these needs into the physical and fiscal policies of the area he serves.

Social planning, to be effective, must somehow incorporate the values of all people. How the planning professional can incorporate these values into his comprehensive plan only time will tell. The framework to be established in this study may provide educators the background to help in this task.

The complexity of these studies requires the work of experts. The comprehensive planner's main function is to act as a synthesizing and coordinating agent whose purpose is to take population projections, economic forecasts, land uses, and relate these to goal and objective development so that plans will truly reflect social needs in an aesthetic manner.

Development of the Comprehensive Plan

The ideal of comprehensive planning is:

(1) to create a master plan to guide the deliberations of specialist planners, (2) to evaluate the proposals of specialist planners in the light of the master plan, and (3) to coordinate the planning of specialist agencies so as to ensure that their proposals reinforce each other to further the public interest. Each of these functions requires for ideal performance that the comprehensive planners (a) understand the overall public interest, at least in connection with the subject matter of their plans, and (b) that they possess causal knowledge which enables them to gauge the approximate net effect of proposed actions on the public interest.⁶

⁶ Alan Altshuler, The City Planning Process: A Political Analysis (Ithaca, N.Y.: Cornell University Press, 1965), p. 299.

The basic governing policy of comprehensive planning then is to adopt a course of action directed toward the achievement and attainment of goals and objectives which reflect the desired interests of the area being served.

A comprehensive plan may be derived for any area; a country, state or region either intrastate or interstate, a county, city, township or village. Therefore, when discussing a comprehensive plan, one must state the planning area. The terms Master Plan and General Plan are used synonymously with Comprehensive Plan but the term Comprehensive Plan is more contemporary and more frequently used today.

A Comprehensive Plan is an official public document adopted by a governmental unit as a policy for making decisions about the future development of a particular area. It is comprehensive in that it encompasses the social, economic, political and physical sectors of an area. It is general in that it indicates general administrative action in the form of proposals and policies. It is long range including, but looking beyond, current issues to developmental possibilities for the next 20-30 years. It is not necessarily, however, a piece of legislation, although it is often used for legislative information and advice.

Comprehensive planning is generally divided into four processes.

1. Survey and analysis, or collection of basic data related to physical, economic, and social conditions.
2. Goal formulation, or identification of and agreement upon social and economic objectives.
3. Plan making, or determination of suitable uses and densities for specific areas and for the circulation system and public facilities.
4. Plan effectuation, or legal and administrative tools to carry out the plan and to coordinate decisions.⁷

The factors involved in the collecting of basic data for the survey and analysis process have been identified and defined briefly. The second process, that of goal formulation, synthesizes the findings of the basic studies into the goals essential to the third phase, that of plan making.

The Comprehensive Plan itself, then, is a document that provides information about the present social, economic, and physical resources of an area. It attempts to outline the goals and objectives agreed upon by the people in that area. It proposes developmental schemes to obtain the goals and objectives at some later date. It must serve to test and evaluate the developmental schemes. It must suggest the tools of implementation necessary for the attainment of its goals. Thus, the comprehensive plan is a long, involved document which

⁷William I. Goodman and Jerome L. Kaufman, City Planning in the Sixties - A Restatement of Principles and Techniques (Urbana: University of Illinois, 1965), p. 5.

attempts to coordinate and synthesize activities of its area in a realistic manner for the attainment of societal goals.

Tools for Implementation

The comprehensive planner and planning agency must function within certain governmental units and laws in order to effect implementation of the comprehensive planning process.

Comprehensive planning is a vital function of a democratic government. The success of its programs is largely determined by how well the planner and planning agency function within governmental confines. The complexity of this issue becomes clearer by viewing the various kinds of governmental units that exist, especially within metropolitan areas.

Most metropolitan areas contain numerous municipalities (variously called cities, villages, incorporated towns, and boroughs), one or more counties, a number of school districts, and a variety of non-school special districts. In addition, some of them, . . . have towns or townships. All these categories of local governments differ tremendously in many respects - in territorial size, powers, financial authority and resources, structure, and ability to adjust capably to metropolitan conditions, . . . Some of these variances often are evident even within the same category or class of local governments; for instance, in various states municipalities differ in structure and substantive powers, special districts differ markedly in features from each other, and county governments are of different types. The variations can be still more pronounced when a metropolis straddles parts of two states, a condition that has become increasingly more common. Each state determines the

characteristics of every category of its local units without deliberate regard for comparable actions in adjoining states.

It is important to gain an understanding of the governmental system of the metropolis and its various parts or subsystems. Governments, as we know, represent a very significant dimension of the metropolis . . . ⁸

Somewhere, within the confines of these political structures, are planning offices developing plans and policies to either function within or change the legal framework to carry out the goals and objectives of the planning process.

All planning action must satisfy federal and state constitutional requirements of "due process." Planning then must function within the legislative actions granting it necessary authority to carry on the planning process.

The Legal Basis for Planning

Due to the American System of states rights, planning has only those functions and powers delegated to it by each individual state. The state specifies the structure of the planning agency, its powers and the procedures for exercising these powers.

Each state will differ. In the main, there is usually a State Planning Agency to coordinate economic development, transportation, budgeting procedures, etc.

⁸ John C. Bollens and Henry J. Schmandt, The Metropolis - Its People, Politics, and Economic Life (New York: Harper & Row, 1965), pp. 141-142.

The general trend now is to have this Agency within the Executive Office of the State, so that activities are better coordinated through intergovernmental procedures. Presently most of these agencies are advisory bodies. However, legislative action on the recommendations cited in Chapter II could give these agencies the necessary power to better accomplish the coordination of activities through intergovernmental procedures.

A variety of enabling acts provide for the enacting of ordinances which allow planning to function below the state level. A review of the planning commission acts of the State of Michigan will serve to clarify these ordinances and describe the kinds of activities in which Michigan Planning Commissions are now involved in relation to master plan (comprehensive plan) development. Michigan at present has four legal acts for establishing planning commissions.

1. The Municipal Planning Commission Act, Act 285, P.A. 1931.
2. The Regional Planning Commission Act, Act 281, P.A. 1945.
3. The County Planning Commission Act, Act 282, P.A. 1945.
4. The Township Planning Commission Act, Act 168, P.A. 1959.

Two of these Acts, the Regional Planning Commission Act and the County Planning Commission Act are strictly advisory in nature. They function simply to coordinate and synthesize the various planning activities within their various areas and make appropriate recommendations. Their recommendations are recognized only when they are adopted by the various municipalities within the areas being served by these acts. They have no power in and of themselves.

A summary review of these acts will serve to emphasize these points.

Regional Planning Commission Act⁹
Act 281, P.A. 1945

An act to provide for regional planning; the creation, organization, powers and duties of regional planning commissions; the provision of funds for the use of regional planning commissions; and the supervision of the activities of regional planning commissions under provisions of this act.

This act allows two or more local governmental units to create a regional planning commission whose boundaries will be determined by those legislative bodies. This commission may conduct all types of research studies, prepare maps, charts and make appropriate plans for the physical, social and economic development of the region. It may

⁹Regional Planning Commission Act, As Amended, State of Michigan, Act 281, Public Acts of 1945, p. 19. Laws Relating to Planning, Michigan Chapter of the American Institute of Planners, State of Michigan, Lansing, 1959.

also serve as an advising and coordinating agency to the participating local governmental units.

County Planning Commission Act¹⁰
Act 282, P.A. 1945

An act to provide for county planning; the creation, organization, powers and duties of county planning commissions.

This act authorizes any county to make, adopt, amend, extend and carry out a county plan. The commission shall make studies and surveys and formulate plans and make recommendations for the economic, social, and physical development of the county. It shall cooperate and consult with other departments of state and federal governments and public agencies concerned with development within its jurisdiction and adjacent areas.

The County Commission may be designated a Metropolitan Planning Commission to perform comprehensive planning activities of a metropolitan or regional nature. Any plan recommended for an incorporated area shall be official only when adopted by the municipalities under appropriate statutes.

The two remaining acts, the Municipal Planning Commission Act and the Township Planning Commission Act do have powers. Both of these acts grant the authority to

¹⁰County Planning Commission Act, As Amended, State of Michigan, Act 282, Public Acts of 1945, p. 1; Technical Bulletin A-41, July, 1968; Institute for Community Development and Services, Continuing Education Service, Michigan State University.

their respective Commissions to make and adopt a master or basic plan for the physical development of a community and the unincorporated portions of the township. The Commissions are granted the necessary authority to make continuing surveys, to consult with representatives of the various subdivisions and to attempt to coordinate their activities.

After the adoption of the master plan, no public buildings (schools, etc.), or public structures, roads, parks or other public facilities can be constructed or authorized without the approval of the planning commission. Thus these acts give their Planning Commissions the authority to enforce their recommendations for physical development.

Municipal Planning Commission Act¹¹
Act 285, P.A. 1931

An act to provide for city, village and municipal planning; the creation, organization, powers and duties of planning commissions; the regulation and subdivision of land; and to provide penalties for violation of the provision of this act.

This act authorizes municipalities (cities, villages, other incorporated political subdivisions, townships and chartered townships) to make, adopt, amend, extend, add to, or carry out a municipal plan. The commission shall

¹¹Municipal Planning Commission Act, As Amended, State of Michigan, Act 285, Public Acts of 1931, p. 1; Technical Bulletin A-60, July, 1968; Institute for Community Development and Services, Continuing Education Service, Michigan State University.

make comprehensive surveys and make a master plan for the physical development of the municipality. When the master plan is adopted no street, square, park, or other public way, ground, or open space, or public building or structure shall be constructed or authorized in the municipality unless it has been submitted to and approved by the commission. This commission will also consult and advise other public officials and agencies (education, public utilities, civic, professional and other citizen organizations).

Township Planning Commission Act¹²
Act 168, P.A. 1959

An act to provide for township planning; for the creation, organization, powers and duties of township planning commissions; and for the regulation and subdivision of land.

This act gives the township board the authority to create a planning commission to make, adopt, extend, add to or otherwise amend, and carry out plans for the unincorporated portions of the township. After the adoption of the basic plan no street, square, park or other public way, ground or open space, or public building or structure, shall be constructed or authorized in the township without the approval of the planning commission.

¹²Township Planning Commission Act, As Amended, State of Michigan Act 168, Public Act of 1959, p. 1; Technical Bulletin A-71, July, 1968; Institute for Community Development and Services, Continuing Education Service, Michigan State University.

These two acts then do have the authority and power to guide the physical development of municipalities and the unincorporated portions of townships.

The Regional and County Enabling Acts have the authority only to make recommendations concerning the social, economic, and physical development of their various jurisdictions.

These are the main tools that comprehensive planners work with today. They grant very little authority to the planning profession. Action on the recommendations cited in Chapter II for cooperative intergovernmental activities of a regional nature could grant the necessary authority to better carry out the planning process.

But change is slow. Barr,¹³ in 1950 wrote:

Today the social and physical development problems of a community are becoming more complex, and the functions of each political subdivision are becoming more firmly enmeshed with those of its neighbors. . . . To achieve the proper planning coordination between the many political subdivisions, it is necessary for the state legislature to reconsider the many enabling acts dealing with planning, zoning, . . . The planning laws for all political units should be combined in a general law. In that way, it will be possible to establish a clearly defined planning policy.

¹³Charles W. Barr, Planning the Countryside - The Legal Basis for County and Township Planning in Michigan (East Lansing: Michigan State College Press, 1950), pp. 83-84.

Zoning

The major tool used by planners in implementing the land-use plan of an area is zoning. Zoning is the legal and administrative device by which many physical plans are implemented. The regulatory powers which zoning controls are population density, the height, bulk and percentage of lot coverage of buildings and other structures, and the use of the buildings and land for trade, industry, residence and other purposes.

It is strictly a function and tool of physical development but is most important in the general scheme of the Comprehensive plan. The comprehensive plan must work within existing zoning laws while indicating necessary changes in them. One of the main problems that exist today, especially in metropolitan areas, is that full-scale zoning ordinances were adopted before full-scale planning was initiated. The overriding thought, however, should remain that zoning is an integral part of the comprehensive plan. It should not, however, be the means by which the plan is developed.

Land Subdivision

Subdivision regulations are locally adopted laws which govern the division of land for immediate or future use and/or building development. The regulations are extremely important to planning in that they provide the

planning commission a chance to check and coordinate the various activities of developers as to the design and layout of private lands. Subdivision regulations are a means of insuring that new developments are provided the necessities for day-to-day living by regulating the shape and growth of an area and securing public utilities in a safe and economical manner.

A good planning program will use zoning and subdivision regulations within the context of the comprehensive plan to guide the developmental phases of land uses while preserving areas for future needs.

Taxation

Planning like all governmental activities requires revenues to succeed. The state legislature gives the authority to the state, county, townships, cities and villages to levy and collect taxes. The amount of these revenues allocated to the planning process will in part determine the success of the process, and the success of the process could in fact determine the amount of money allotted it. The end result of the comprehensive plan in relation to taxation should always remain to better coordinate activities so monies collected from the people will in fact give them the most return for their dollars.

This overview of the basic studies, data collections and special approaches utilized by comprehensive planners

in developing objectives and goals of comprehensive plans, and the "tools" necessary for the implementation of these plans are basic to an understanding of the conceptual framework of comprehensive planning which will be established in Chapter IV.

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CHAPTER IV

THE ESTABLISHMENT OF A
CONCEPTUAL FRAMEWORK

Introduction

As man's world has been changing since time began, so has planning. As man's adaptability is great so is that of the planning process. The increasing knowledge assimilated today suggests that man through planning has the potential to actually shape his future. The assimilation of knowledge and adaptability to change has brought planning from an end-oriented approach to a process approach whose central focus is to satisfy the needs, desires and goals of the society it serves, within an extremely complex operating matrix. Since the problem of understanding the comprehensive planning process is immense, this chapter will conceptualize the information previously discussed in this study. A basic framework of the comprehensive planning process will be established to aid non-planners in understanding the process.

Thus far this study has identified some of the "key factors" of the planning process. The term factors is used here to denote the principles and practices as well as the basic studies, data collections, and special

approaches utilized by the planning profession in constructing a comprehensive plan for a given area.

The first part of this definition refers to principles and practices. These are the "givens," or existing parameters, which represent the present approaches, current trends and future directions of the planning process. They have been discussed in Chapter II. The second part of this definition is influenced by the first. It has been discussed in Chapter III under basic studies, data collections, and special approaches utilized by planners in the planning process to construct the goals and objectives of comprehensive plans. These factors represent the "basics" needed by educators to deepen their insights and understandings into the comprehensive planning process. This understanding should serve to better define the present and future educational needs of a region. It is hoped that through the increased understanding and awareness of planning that education should acquire from this framework, a bridging effect might evolve between the two professions. This bridging should help both the process of planning and the process of education to coordinate their efforts so future trends and developments may truly be more comprehensive in nature.

Before constructing and elaborating on a framework of comprehensive planning, an overview of its basic principles will serve to lay a good foundation. The basic

principle of all planning activities is to maintain a balance between natural and economic resources, and the most important resource of all, people. Within this process new challenges constantly evolve. The major challenge today is attempting to meet the needs and desires of ever increasing metropolitan populations by allocating scarce governmental resources among a multitude of demands. Providing for these needs and resolving the conflicts inherent in doing so, can best be achieved through some agency that has as its central focus the coordination and efficient management of social subsystems in order to bring maximum returns to the people. Planning, through its process of comprehensiveness, provides the framework and opportunity to resolve these kinds of conflicts.

Comprehensiveness today means an ever increasing awareness of the interrelated social, economic and physical variables within a political framework extending over a given space and time. Within this process a plan is created, comprehensive in nature, which guides and evaluates the proposals of specialist planners to coordinate their efforts so that their proposals reinforce each other to better serve the client public. The comprehensive plan is flexible, general and long-range. Its present day actions have long-range effects and implications. Its major objective is to coordinate and guide all the major resources and sub-systems of an area through public interest

and eventually bring maximum benefit to that region and return to the people.

The framework to be established will show that the comprehensive plan is the most significant part of the on-going planning process. It is, at the same time, the product and determining force of the different kinds of studies, activities and approaches utilized throughout the process.

The major purpose of this conceptualization is to establish a framework of the planning process to increase educators' understanding of comprehensive planning. This deeper understanding should also increase the utilization of the planning process so that the educational leaders of an area may better understand the present state of an area as well as its future developmental potential. Through a deeper understanding of the area to be served, educators will be better prepared to meet new and changing situations and to influence change as members of the total planning process. In this way, through an understanding of new educational situations created as change takes place, educational needs and desires of the area may better be served through the context of the larger plan.

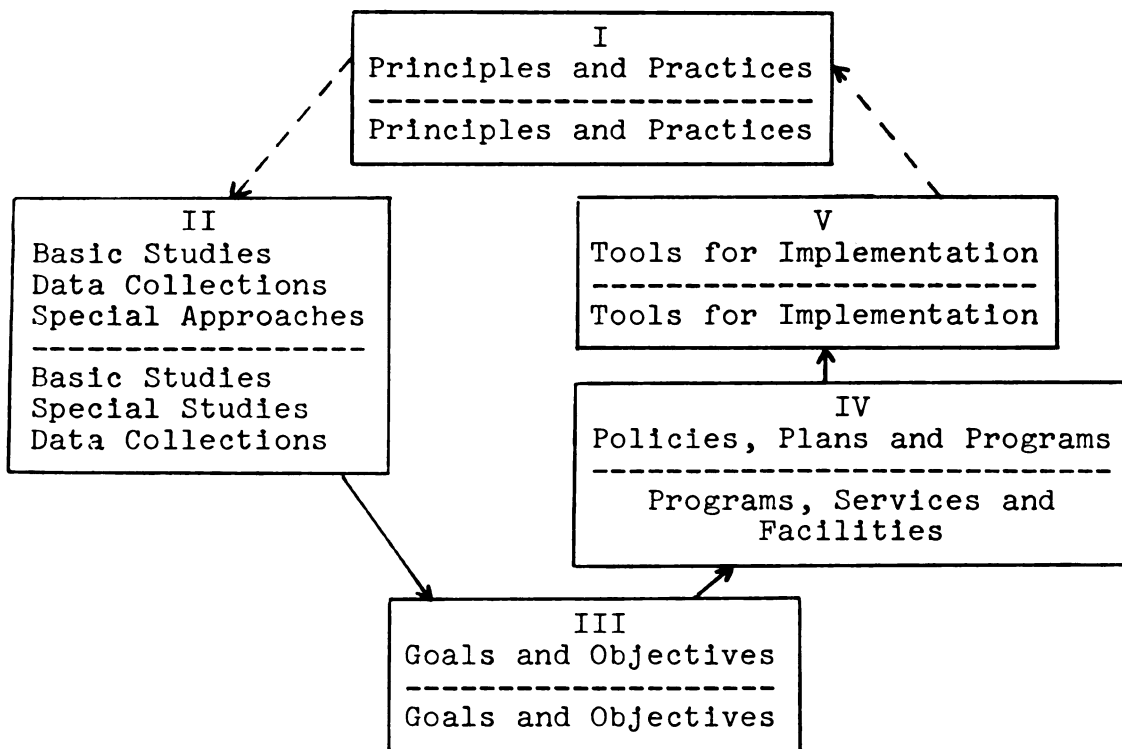
A Basic Schematic: Planning/Education

Education, like all the sub-systems of the larger whole today, is process oriented. The schematic below

will serve to introduce the planning process by showing the close relationship that exists between it and the educational process.

The top half of each segment represents the factors of comprehensive planning while the lower half represents the educational factors.

A Basic Schematic



Existing within and between each segment is a means of constant evaluation. A constant state of checks and balances on the comprehensive planning process also exists, especially prior to plan adoption. These take the form of legal acts and ordinances, public hearings,

debates and meetings and a public awareness of comprehensive planning activities through the news media.

The outline on the following page will delineate the activities within each segment of the total process. This basic schematic and outline shows the close relationship that exists between the general process of comprehensive planning and the more specific process of education. The same comparison could be made between the comprehensive planning process and other specialized processes with the development of much the same type of framework. Because planning, to be truly effective, must synthesize and coordinate all the specialized activities of the various subsystems that comprise the larger whole, many variables must be considered within the defined region over a time period.

A Conceptual Framework

To expand this basic schematic into a conceptual framework of comprehensive planning requires that the variables be identified which must be incorporated. In addition, how these variables are integrated throughout the process must be shown. The first two variables are the easiest to identify and the hardest to define. They comprise the periods of time and the areas to be served by the comprehensive planning process.

Time is extremely important in the planning process. It establishes a basic guide for conducting studies and

Comprehensive PlanningPrinciples and Practices

The givens
 The basic parameters
 The existing philosophy

Basic Studies, Data Collections and Special Approaches

Population Studies
 Economic Studies
 Environmental/Land Use
 or Physical Studies
 Transportation Studies
 Open Space and Recreation
 Studies
 Studies of Other Public
 Facilities
 Studies on Appearance
 Studies on Social Plan-
 ning

Goals and Objectives

Formulation of new Goals
 Revision of existing Goals
 Formulation of new
 Objectives
 Revision of existing
 Objectives

Policies, Plans and Programs

Policy Making
 Policy Revision
 Plan Making
 Plan Revision
 Program Making
 Program Revision

Tools for Implementation

Legal Structure
 Zoning Ordinances
 Subdivision
 Taxation
 Public Interest
 Administrative
 Structure

EducationPrinciples and Practices

The givens
 The basic parameters
 The existing philosophy

Basic Studies, Special Studies and Data Collections

School Population Studies
 School Economic Studies
 School Plant and Facili-
 ties Studies
 School Transportation
 Studies
 Educational Program Studies
 Educational Service Studies
 Staff Development Studies

Goals and Objectives

Formulation of new Goals
 Revision of existing Goals
 Formulation of new
 Objectives
 Revision of existing
 Objectives

Programs, Services and Facilities

Program Implementation
 Program Revision
 Service Implementation
 Service Revision
 Facility Implementation
 Facility Revision

Tools for Implementation

Legal Structure
 Jurisdictional Boundaries
 Taxation
 Public Interest
 Administrative Structure

implementing various policies, plans and programs. Time is basically a three phase element divided into short range, intermediate and long range segments. Short range time usually refers to the time spent in the conducting of basic studies, collecting data, identifying and/or revising basic goals and objectives and establishing and/or revising basic policies. The period involved may range from less than one year to five years. One to three years duration is usual for short range planning activities.

The intermediate phase is most easily defined by the activities involved within it. It is that time period in which the comprehensive plan is established or revised, and various programs are developed and/or revised. This time period also shows a continuation of previous activities, especially policy revision. The period of time involved here is usually from two to five years.

Long range time usually refers to the "life" of the comprehensive plan. It is concerned with the general development of the area served for a time period extending twenty to thirty years into the future. Because the comprehensive plan is in fact tied directly to the process, the activities of the first two time periods are also continued. Twenty to thirty years is just another guide to simply establish some parameters of the plan. If the process is complete, revision techniques will show the plan to be an on-going instrument.

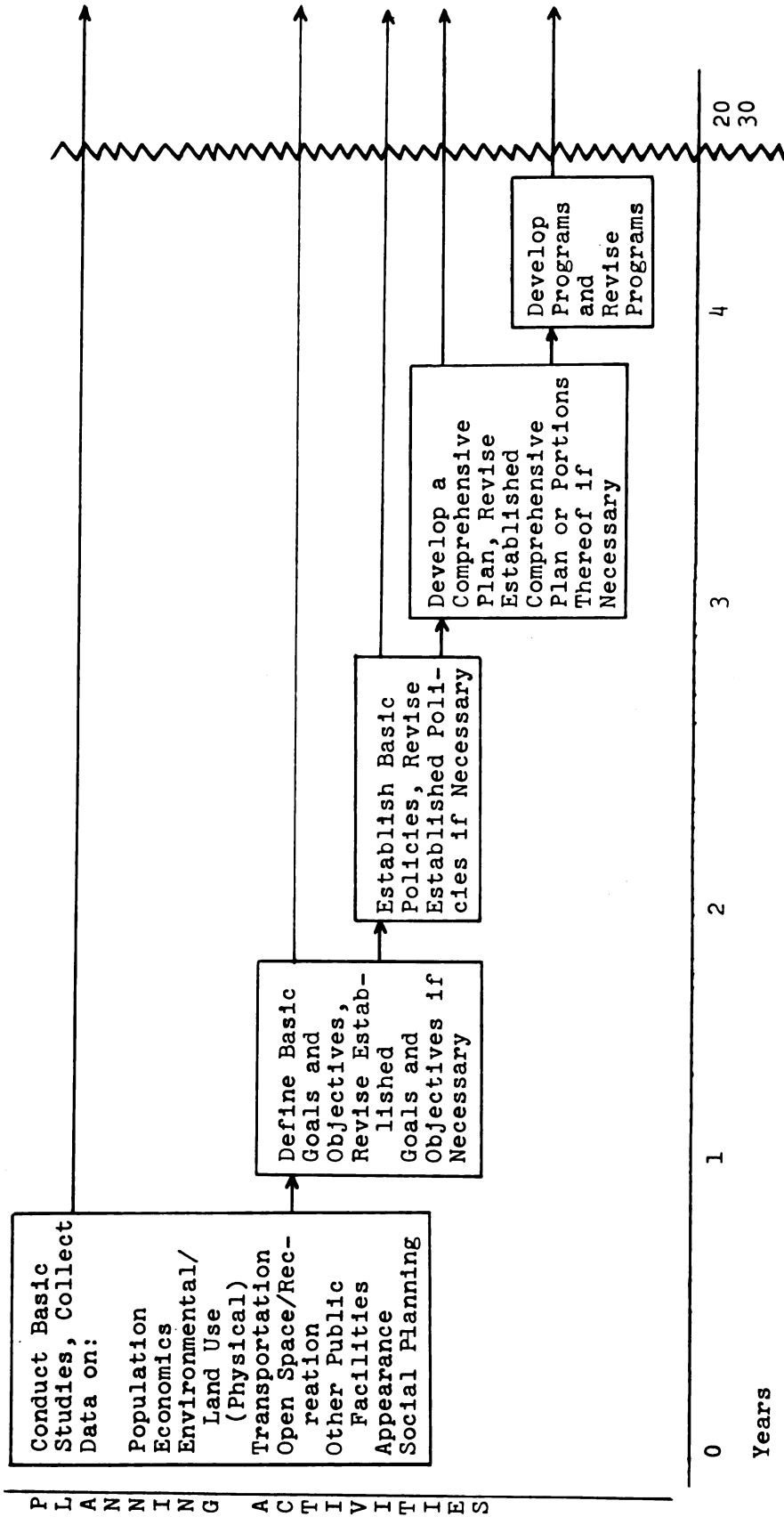
The time spectrum on the following page shows the relationship between time and planning activities within the planning process. The years denoted at the bottom of the spectrum cite the time used as various planning activities are conducted for the first time. The activities then become ongoing evaluative processes, which allow for necessary revisions.

The second general variable is the area which is to be served by the comprehensive planning process. For purposes of this study, these range from small to large and may comprise the local community, the urban area, the metropolitan region or the state.

The local community is comprised of units basic to the American way of life, the neighborhoods. Within these neighborhoods usually are found service, shopping and recreational facilities. They also contain an elementary school, usually within walking distance of the residential areas. Two or more neighborhoods combine to form a community with extended service, shopping and recreational facilities. Depending on the size of the community, one or more middle and senior high schools may also be found. Extended educational facilities also show some of these areas containing a community college.

Next in size is the urban area. It is usually and most conveniently defined by political boundaries. It is a complex of people, businesses, industries, multi service

A Planning Time Spectrum



and shopping facilities, civic and cultural centers all interconnected by networks of transportation and communication. It provides basic services and facilities to its surrounding adjacent communities.

The next area, which in the future will be receiving increasing attention, is the metropolitan region comprised of a metropolis and its supra-urban space. Its tangible boundaries are hard to define because its influence is great. In order to deal with this elusive area, the different influences within its boundaries that enable it to be distinguished from its neighboring territory must be considered. In the main, metropolitan regions are usually distinguished by social, economic and political cohesiveness. Metropolitan regions often jump political boundaries and many times jump state boundaries to include similar social and economic interests within their boundaries. Political cohesiveness is the most difficult to control under existing enabling legislation. Regional plans may, in fact, be the only answer available to meet these increasing needs of present and future society.

The last area identified to be served by a planning process is the state. Politically, it is the largest of planning units. The planning process carried out at this level greatly affects the activities engaged in within these lesser units. The most important function of the state in the planning process is in recommending and

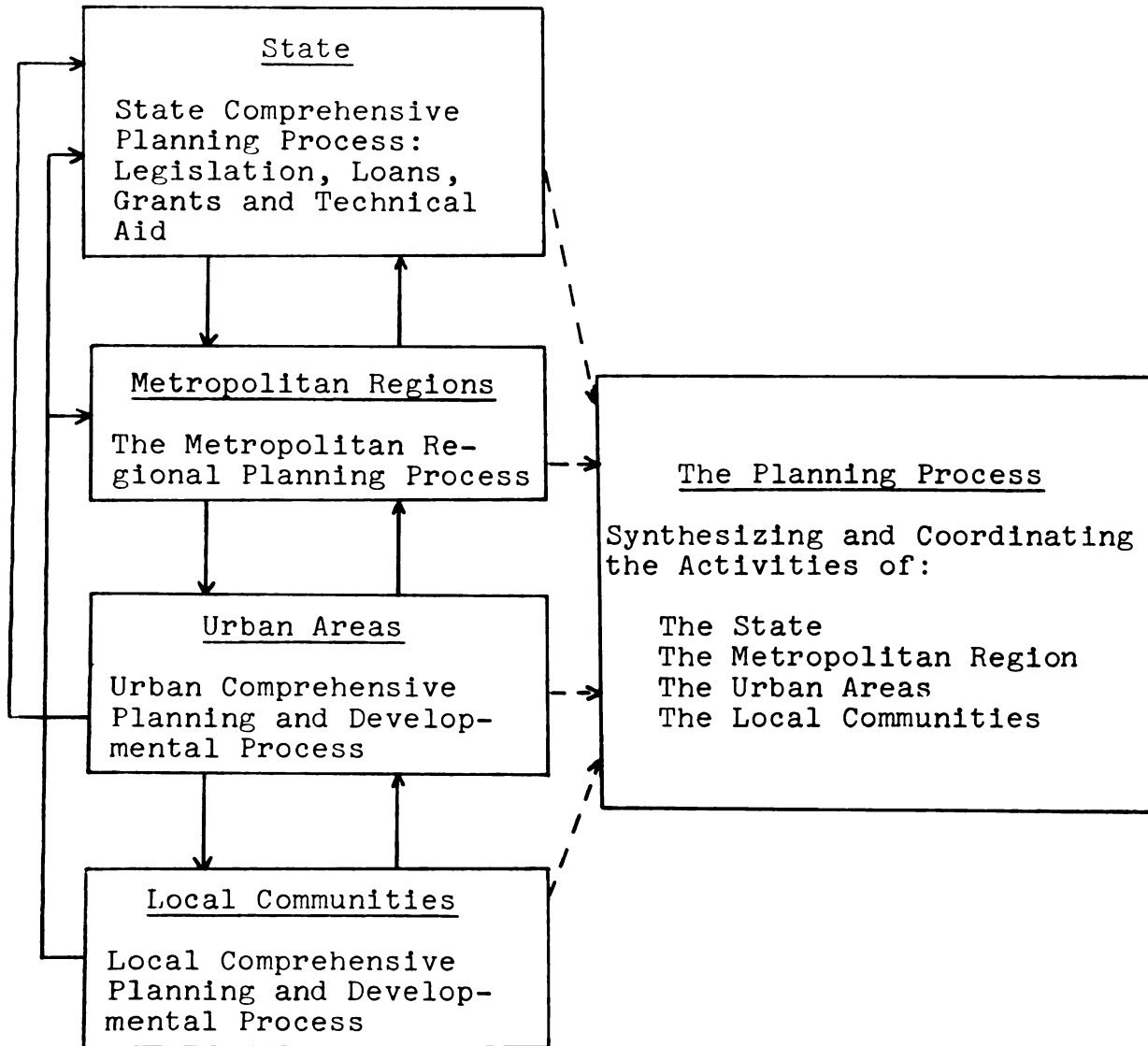
passing legislation to provide authority for other planning units, in granting loans and support for planning activities, and in providing technical assistance to other planning units.

The importance of identifying the area to be served by the planning process is extremely important. Different communities most likely will already have plans developed. The function of the planning process then is to conduct planning activities that will synthesize and coordinate the studies, surveys, plans, proposals, codes and ordinances of the lesser community into the plan of the larger whole. The local planning agencies have knowledge of and insights into the community that are invaluable in developing objectives and goals for the comprehensive planning process especially at the state and regional level. The effect the state and regional planning activities have on smaller units is equally great.

The purpose of area identification within the planning process then is for different planning units to synthesize cohesively and coordinate their activities so that the needs and desires of all the people may be more actually realized.

The last set of variables to be identified and incorporated into the comprehensive planning process are those social, economic, physical and political elements that comprise the planning area. The social variables

Areas of Comprehensive Planning



that must be identified within any given area are great. They range from individual human needs, values, desires and perceptions to the interrelationships each of these has to social institutions as a whole. To as great an extent as is possible, these social needs, values, desires and perceptions must be identified, considered and incorporated into the objectives and goals of the comprehensive plan. Because social variables are concerned with people, the characteristics of the area's population in relation to social structure is most important. Distribution of population by age, sex and socio-economic status is important in determining the social and cultural significance of various groups within the planning areas and the interaction among these groups. The extent to which these needs, values, desires and perceptions are identified and incorporated in the planning process may well determine the long-range success of that process.

The economic variables that must be identified focus upon the relationship the area to be served by the planning process has to other areas and the services it provides within its own boundaries. The structure of the area's economy must be identified for sources, types and distribution of employment, as well as for income and expenditure patterns. The area's economic potential must be identified to see why it exists, and what possibilities there are for change. Economic imbalances should be

identified and corrective measures incorporated into the goals and objectives of the comprehensive plan. The success of the planning process depends largely on the accuracy of economic studies and future economic projections. If the identification of the variables is accurate, projections are sound, and provisions are made to incorporate them into the comprehensive plan, then the success of the plan and planning process is reasonably well assured.

The physical elements that must be identified are those natural and man-made resources and facilities that comprise the area. The natural resources are the area's water, soils, minerals, vegetation and climate. The man-made facilities are buildings and other structures such as civic, cultural, historical, recreational, transportation, health and service facilities and farmlands. The economic, social, cultural, aesthetic and functional affects of these elements must be incorporated into the comprehensive planning process. The quality of life lived by the people in an area depends largely on the management and development of these variables.

The political variables are all those governmental units and public service agencies that work within the particular area for which the plan is being developed. This could well be the key element to be identified within the planning process for the success of the plan may well depend on the cooperation received from these governmental

and service agencies. The extent to which provisions are made for them to coordinate their services and activities may well determine the financial and service return to the people.

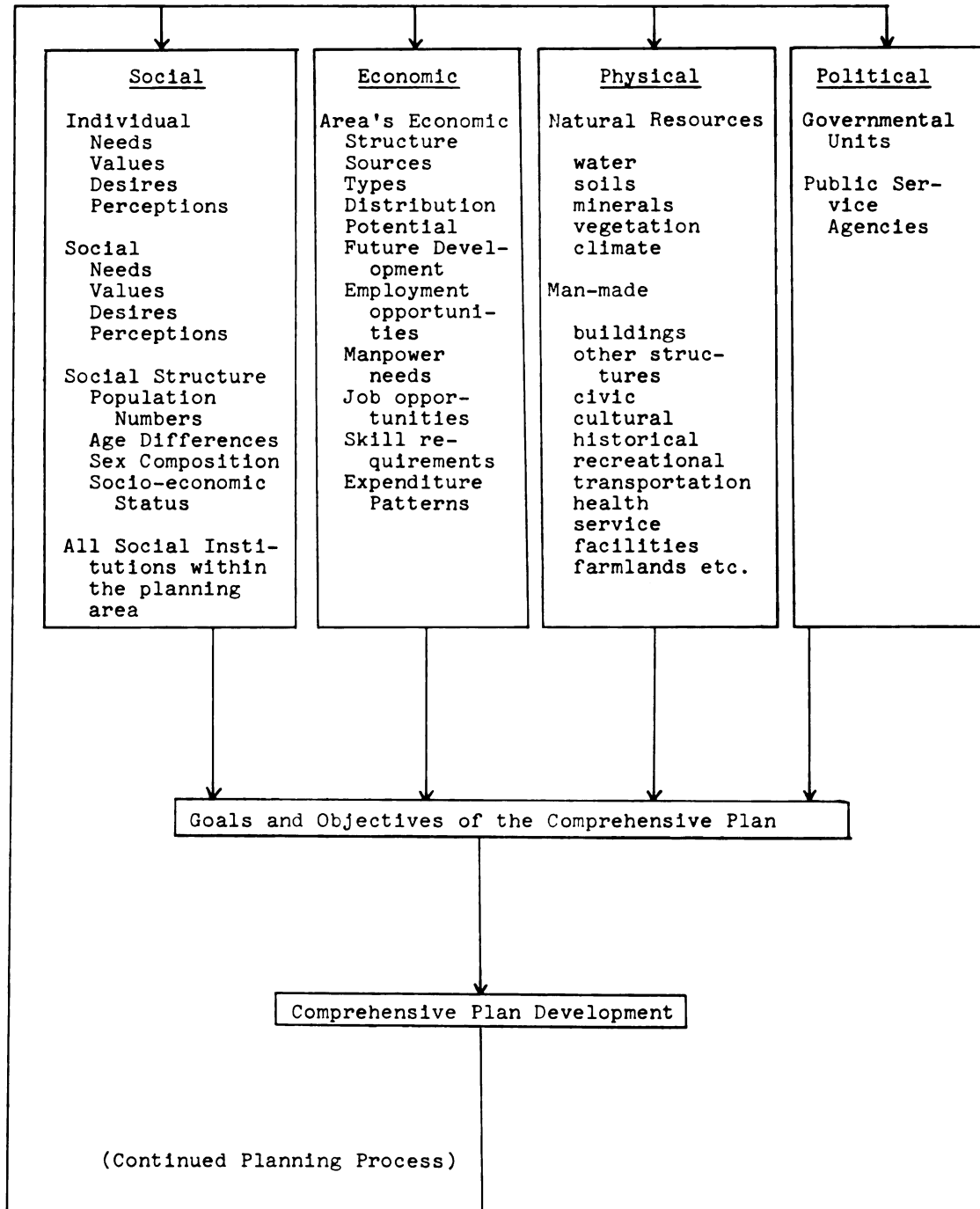
The successful identification of these variables and the extent to which they are coordinated and incorporated into the planning process will determine, in the end, the amount of the return to the people in meeting and satisfying basic needs and desires.

Goals and Objectives

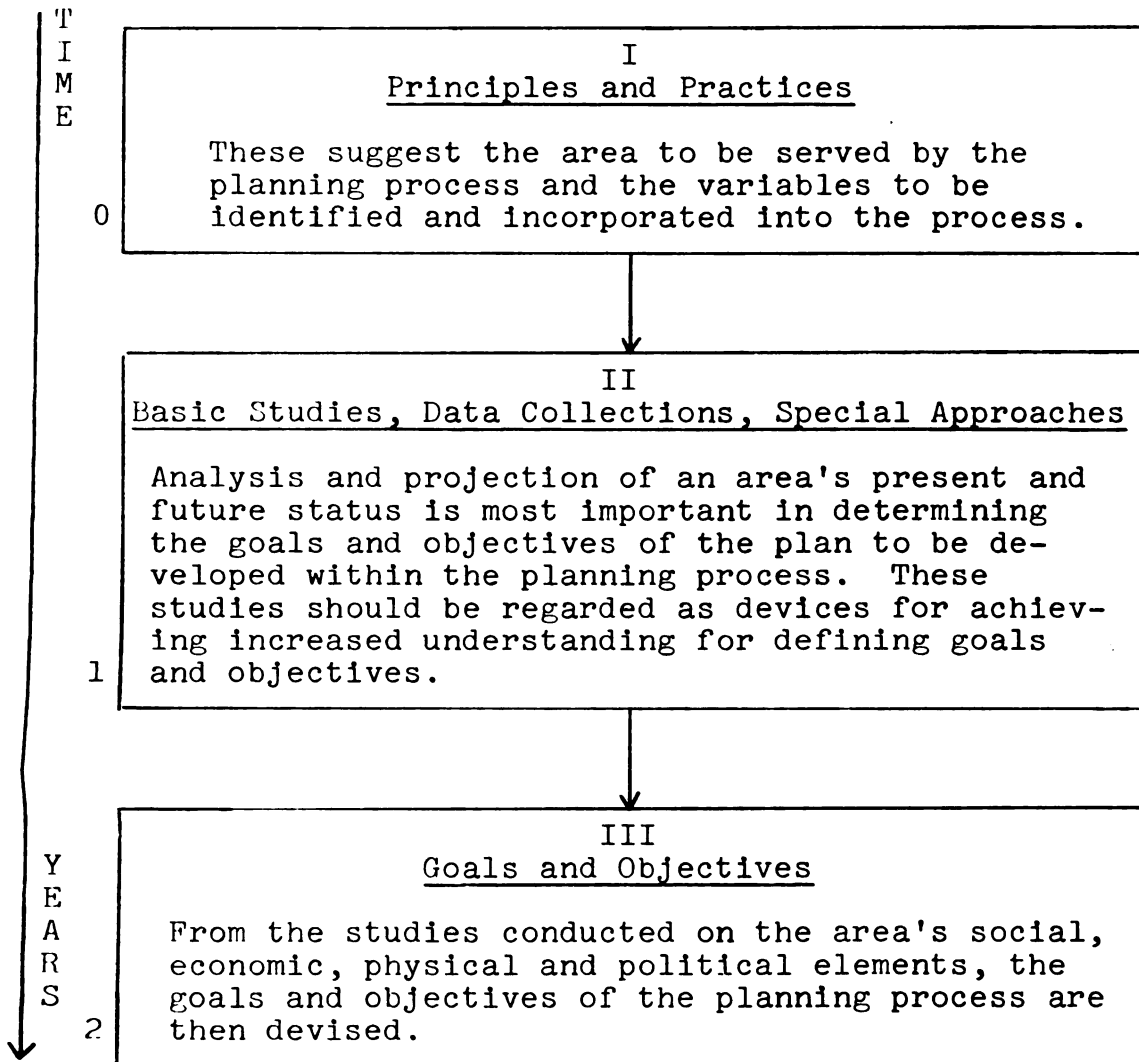
The planning process begins with the delineation of an area and the identification of the area's significant variables. The next step is to conduct basic studies, collect data and see what special approaches if any should be taken during the beginning phases of the process. After analyzing the basic studies, data collections and special approaches, in relation to the area's identified variables, the first part of plan development then takes place as the goals and objectives of the comprehensive plan are identified. A return to the basic schematic of the planning process will emphasize the process taking place thus far (see page 94).

Since planning today is a process, it is goal oriented. After studying the social, economic, physical and political matrix in which this process must operate, and

Variables of the Planning Process



A Basic Time Schematic of Sections I, II and III



the areas of concern, goal formulating may then begin. The goals are those broad foundations upon which the continuation of the process is based. They seek to establish the major areas of concern and basic alternatives to these concerns. They identify, examine and promote the kinds of measurable objectives that will be incorporated into the planning process. They thus provide the purposes and directions for the process.

Goal formulation, like all planning activities, should be enacted only through the legislative process. In this way, the people of the area to be served by the comprehensive plan are given the opportunity to make decisions about the social, economic and physical development of their particular area.

Because the goals are broad and usually general, measurable objectives, more specific in nature, must be specified. The success of the process depends largely on how well the planning objectives are attained. Objectives are usually defined by the social, economic, physical and political variables for which they are established.

Social objectives should be the first to be defined and should receive the highest priority. Their prime purpose is to serve the needs and desires of the people. Provision must be made so that basic human activities are supported within the planning process. A multitude of objectives should provide the people of an area choices for

living and working as well as for educational, recreational and cultural pursuits of both a general and special nature.

Economic objectives provide for the most efficient use of an area's resources. They provide the opportunity for future development through a sound financing system. Economic objectives must provide the public and private sectors of an area's economy the opportunity to develop sources, types and distribution of employment. New and future economic development should be encouraged while preparing this set of objectives, and provisions should be made to encourage growth patterns, and to maintain a balance and distribution of the area's economic opportunities.

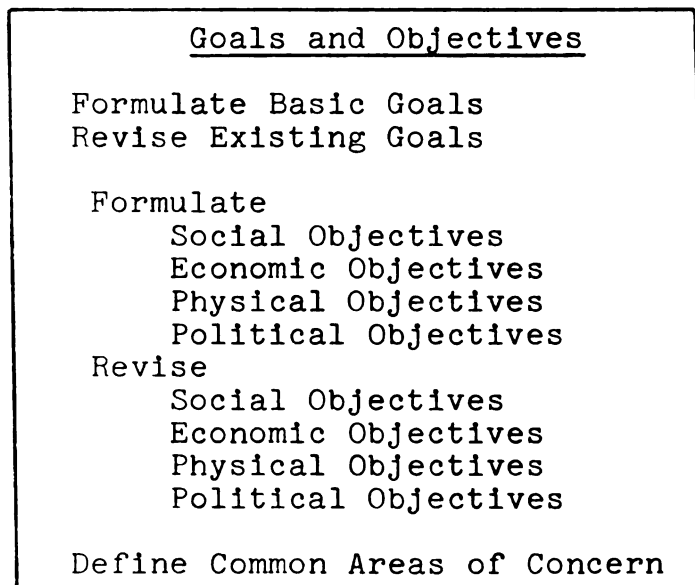
The physical objectives are primarily concerned with the distribution and densities of population throughout the planning area. The prime focus of this set of objectives is to provide for the effective location of residential, employment, educational, recreational, civic and cultural buildings, structures and sites. These objectives also provide for easy and efficient means of transportation to and from any buildings, structures and sites. The objectives should also provide the opportunity to correct existing poor conditions, while maintaining good conditions and providing the framework for a better planned future through physical development.

Political objectives must be specified to provide a means whereby planning units may urge full-scale

coordinated activities among the various units of government encompassed within the planning area. Because comprehensive planning touches all units of government, political objectives must be incorporated into the planning process.

Establishing goals, defining measurable developmental objectives and defining common areas of concern are essential parts of the planning process. Once incorporated into the comprehensive plan, these guide the direction a particular area will take in shaping its future development. Every effort must be made to include the public within the planning process so necessary understandings are shared and developmental goals and objectives may be easily adopted.

Basic Schematic Segment III:



Policies, Plans and Programs

After the initial establishment of basic goals and objectives, the next step in the planning process is to develop policies, plans and programs to obtain the defined goals and objectives. If the process is one which is engaged in to revise and to update activities, then this phase of the process should be concerned with revising and updating the policies, plans and programs to meet the criteria of the new goals and objectives.

The establishing of policies in the planning process is an extremely valuable activity. Policies define a course of action in obtaining goals and objectives. Policies are administrative tools which, when adopted, become the means of carrying out particular activities. Policies establish a framework composed of general statements which define the direction and scope of future planning activities. They provide the basis by which specific recommendations and planning activities are derived from general goals and objectives. Many times policies are developed into a policy plan. This process then becomes a set of well specified activities geared to meet some well established objectives. A policy plan is a set of statements which guides the day-to-day decision-making activities of public officials. If well established and adopted, it has beneficial effects on the planning process. The ease in understanding policy statements and seeing the

completion of specific activities encourages a good working relationship between planning officials, elected officials and the general public. A policy plan may provide the framework to coordinate and synthesize the activities of local and multijurisdictional political and other public service agencies. This is extremely important and beneficial for metropolitan regional planning activities. A policy plan or set of policy statements usually focuses upon short-range planning activities, and therefore is generally readily acceptable. A set of policy statements or a policy plan may well be the initial device needed to engage in comprehensive planning activities and/or the means whereby a comprehensive plan is authorized, constructed and adopted.

Most often now, however, policy statements or policy plans are incorporated within the comprehensive plan. The comprehensive plan can be said to be the official document of the planning process. It is the direct result of all previous planning activities. It is, at the same time, the document that will allow for the continuation of future planning activities after its adoption.

The basic characteristics of the comprehensive plan are that it is comprehensive, general in nature and long range. The plan is comprehensive in that it includes all the social, economic, physical and political variables that comprise the planning area. The plan is general in

that it coordinates and synthesizes the policies, proposals and future directions of the social, economic, physical and political sectors of the planning area, but it does not indicate specific regulations or locations for various activities. The plan is long range in that it looks beyond pressing current issues and looks to coordinating developmental activities for the next twenty to thirty years.

Comprehensive plans do have some basic requirements. The plan should be a single official document adopted by the legislative body of the area for which it is constructed. This can be accomplished for local communities, urban areas and the state. At present there is no legislative framework available allowing metropolitan regions to adopt a comprehensive plan.

After incorporating the social, economic, physical and political goals and objectives and suggesting strategies and activities for meeting these goals and objectives, the plan must provide for the continuation of previous activities. This on-going process is perhaps the most important function of the plan and is extremely important in today's growing metropolitan regions. If developmental planning activities are ever to meet the needs and desires of the people, they must be constant and ongoing. Thus the plan must provide for legislative, administrative, financial and citizen involvement in

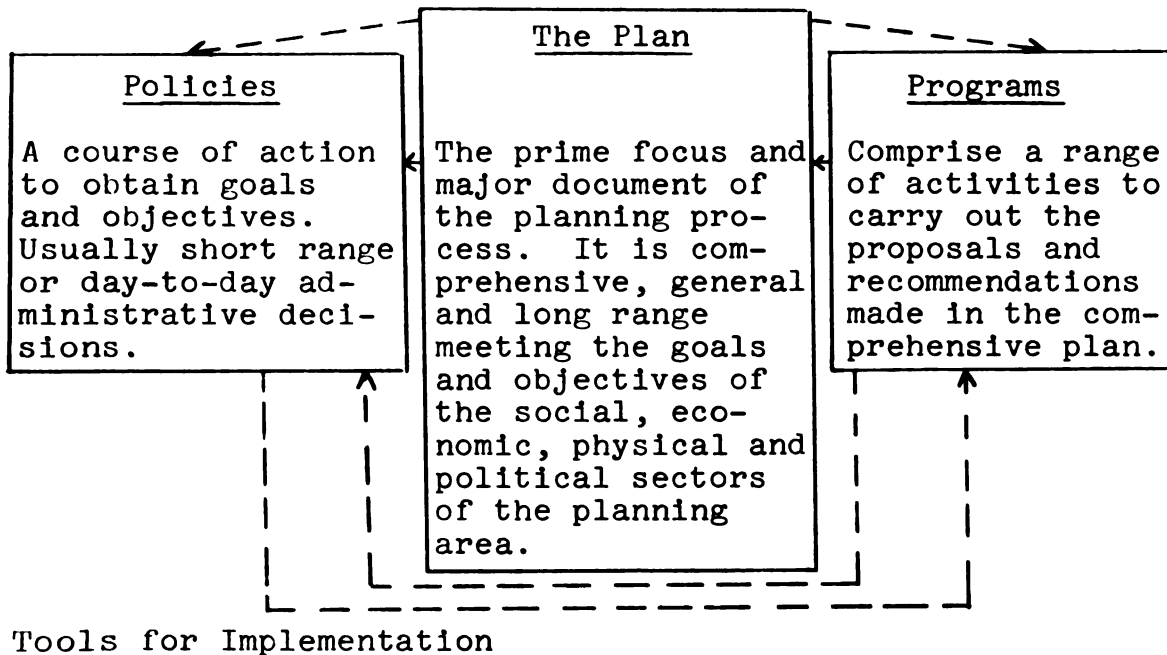
proposals to establish activities so that the planning process remains constant and ongoing.

Because of its complexities, the construction of a comprehensive plan should be left to the planning professionals. The scope of the activities they engage in, however, should not slight any of the areas previously discussed in this study. Should this happen, comprehensive planning and the development of a comprehensive plan are ineffectual and ineffective, for the planning activity then becomes either physical, economic, social or political planning and not comprehensive. Many of the plans that are called comprehensive today are in fact not comprehensive but are stop-gap measures taken to meet some pressing need and are lumped under the heading of comprehensiveness. The reader should be constantly aware of such plans and activities.

The programs of the planning process should carry out the proposals and recommendations made in the comprehensive plan. Programs comprise a range of activities which attempt to coordinate the various activities of the social, economic, physical and political sectors of the area being served. Comprehensive planning programs provide financing and capital improvement opportunities for these sectors. They provide a means for implementing on a smaller scale and within shorter time segments the general goals and objectives of the comprehensive plan.

Because programs are developed within the planning process and are incorporated into the comprehensive plan, their activities can be said to be total. They are not ad hoc in nature, but rather they are concerned with the total development of an area's social, economic, physical and political sectors over a long period of time. Thus separate programs for the physical development, economic development, social development and political development of an area are possible, but if such programs come out of the comprehensive plan, they will have as their central focus the comprehensive long-range development of the area.

Basic Schematic Section IV:



Presently, the tools for implementing the comprehensive plan and for continuing the planning process are

inadequate. They are specified under those legal structures that provide planning the authority to exist within various governmental structures and those ordinances that provide it auxiliary support. The legal framework of planning consists of those federal and state legislative enabling acts that establish planning commissions and specify their functions, duties and powers as well as the administrative structure of such commissions. These will vary at the State level from state to state. At the Federal level, there are now a number of laws governing urban renewal programs and others adding supportive services for planning activities, especially "701 funds" which come under the Housing Act of 1954.¹

Auxiliary services are provided under various zoning and subdivision regulations of the various states. These are, however, primarily concerned with the physical development phase of the planning process and are presently the "tools" most used by planners. Taxation is the means which provides the planning process the necessary revenues to continue.

All enabling legislation dealing directly with the planning process and those which add supportive services remain inadequate. Current trends and directions and the

¹These funds are federal monies offered to the states for planning activities. They are authorized under the Housing Act of 1954 (Public Act 560, Title VII, Section 701).

"increased awareness" of the need for planning activities, comprehensive in nature, may in the near future grant to planning the added legislative action needed to become more deeply engaged in coordinating and synthesizing activities to bring together in a harmonious manner the various directions in which the social, economic, physical and political sectors of society are heading.

This can come about only through public involvement and support which is the most powerful tool any profession has. Presently public support is demanding more return for monies spent. Demands of this type could well be met through the cooperation of the many parts of the total unit within the planning process.

Basic Schematic Section V:

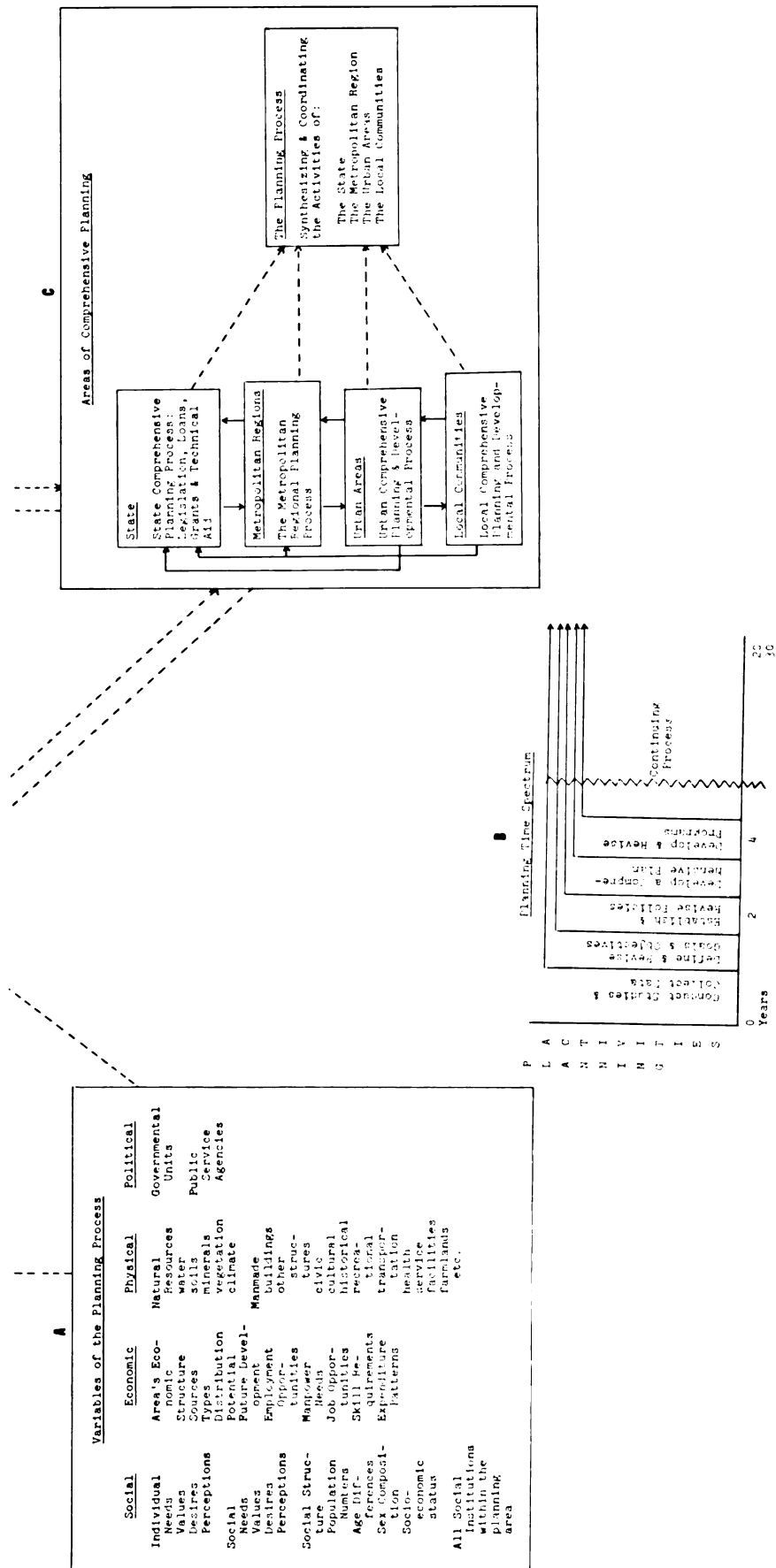
Tools for Implementation

Political Structure
Legislative Enabling Acts
 Specifying Planning:
 Functions
 Duties
 Powers
 Administrative Structure

Auxiliary Support
 Zoning
 Subdivision
 Tax Structure

Public Involvement

The following chart will serve to summarize the comprehensive planning process. Segments I, II, III, IV, and V are those conditions, activities and realities that comprise the main and general directions of the planning process. Segments A, B, and C are comprised of those variables that contribute to the process. The degree to which each of these variables is included within the process will determine the success of the comprehensive plan and the continuation of the planning process.



CHAPTER V

SUMMARY, CONCLUSIONS, DISCUSSION, AND IMPLICATIONS FOR FURTHER STUDY

Summary

This exploratory study established a conceptual framework of the comprehensive planning process. The use of this framework should enhance educators' understanding and awareness of comprehensive planning so they may better understand the educational area for which they are responsible. Education, being one of society's most significant subsystems, has both much to gain from and much to contribute to this process. However, before gains or contributions are realized, a basic understanding must occur. Thus the major objective of this study was to conceptualize the comprehensive planning process for better understanding through the establishment of a framework.

Today, the planning profession is that agency which attempts to coordinate and synthesize all the subsystems of the larger whole. The framework established in this study is looking to the future, for planning has not yet reached the level of sophistication needed to coordinate and synthesize all the social, economic, and physical variables within the existing legal-political framework.

The research cited suggests, however, that planning is moving towards a "new comprehensiveness" that involves and demands new and deeper understandings of the social, economic, physical and political sectors of an area in order to maintain a balance among these sectors. Growing metropolitan regions are receiving increased attention in this area. The legal framework needed to coordinate and synthesize all the social, economic, physical and political variables is presently non-existent. However Chapters II and III cite current recommendations that may enable this new comprehensiveness to succeed on a regional basis in the near future.

The comprehensive planning process must constantly meet new and increasing demands and challenges. The process therefore is composed of a set of ongoing, inter-related activities starting with a governing philosophy or a set of basic beliefs and principles. This philosophy presently is demanding that new and added pressures be placed upon the various social, economic, physical and political sectors of an area to coordinate and synthesize their various activities for development especially within our increasing metropolitan regions. This is done by conducting basic studies and collecting data that help formulate new or revise existing goals and objectives. These goals and objectives are then used to formulate and/or revise policies and develop and/or revise the comprehensive

plan for the area being served. It is the comprehensive plan that is the prime focus of the planning process.

The next phase of the process is to develop a set of programs that will help implement the comprehensive plan through the available legal and political tools and through public involvement and support. Throughout the process there is a constant means of evaluation that suggests or determines whether the present philosophy is maintained or changed. Thus comprehensive planning, through its process, is a continuing activity always serving the area for which it is intended.

The basic principle of planning then is to try to maintain a balance between natural and economic resources and the people. This is indeed a difficult task for no man, profession or institution fully understands how this can be accomplished. If the comprehensive planning process is viewed as a whole, it seems to come closer to coordinating the complexities of the world than do any other activities. This is done by coordinating the work of the experts in the various sectors that comprise the larger whole. These are the responsibilities of the planner and the planning process. Some of the responsibilities of educators, presently, are to attempt to understand this process, to become involved, to challenge old conventions when necessary and develop new approaches to educational planning of a fiscal and physical nature.

Conclusions

In addition to developing a conceptual framework of comprehensive planning to enhance educators' understanding and awareness of that process, this study also set out to answer five questions in relation to this framework. The first three questions dealt with the identification, nature and utilization of selected factors used by the planning profession. It was established that: the term factors was used to denote the principles and practices as well as the basic studies, data collections and special approaches utilized by the planning profession in constructing a comprehensive plan for a given area. The fourth and fifth questions dealt with the educational implications of the framework and its utilization in developing a better understanding between educators and planners.

Question I: What are those factors utilized by the planning profession that have direct bearing on an area's composition and its future development?

This question was answered in Chapters II and III by defining and discussing planning and the planning profession as well as its current trends and directions. These elements were defined as planning's principles and practices. Next the basic studies, data collections and the special kinds of approaches that planners engage in were identified. It was shown that through analysis and

comparison these studies are then synthesized and formulated into planning goals and objectives. The goals and objectives are then incorporated into policies; the plan is developed and programs are implemented through existing tools.

Thus five sets of planning factors were identified in this study:

1. Principles and Practices
2. Basic Studies, Data Collections and Special Approaches
3. Goals and Objectives
4. Policies, the Plan and Programs
5. Tools for Implementation

Three sets of significant variables were also identified:

1. The Area
2. The existing Social, Economic, Physical and Political Variables and
3. The Time Element

Question II: What do these factors tell about the area?

The factors help identify the various social, economic, physical and political variables that exist and must be incorporated within the planning process. The various studies and data collections conducted on an area's population, economy and physical characteristics provide

planners and planning agencies the necessary base to begin to define developmental goals and objectives within the political framework. Thus the identification of variables, the conduction of studies and the development of goals and objectives tell about the current state of affairs as well as future developmental possibilities for a given area.

Question III: How can these factors be utilized in establishing a conceptual framework within which educators may choose to work to enhance their awareness of planning?

The factors discussed in Chapters II and III have been consolidated to establish the conceptual framework of comprehensive planning detailed in Chapter IV. The entities studied and the activities conducted within this framework serve as the basis for developing an educator's understanding of the comprehensive planning process.

Question IV: What are the educational implications that may be derived from the use of this framework?

There are many educational implications to be derived from the use of this framework, especially those concerned with the physical and fiscal aspects of educational planning. Through the use of this framework, educational leaders can become better acquainted with the general state of the area for which they are educationally responsible. Through this understanding, existing situations, imminent problems, speculative opportunities and future trends will become evident. The planning process, through the

development of a comprehensive plan, will provide educators detailed information on the social, economic, physical and political variables existing within their service area.

Through the use of studies, data collections and other activities conducted and compiled by a planning agency, educators can receive detailed information on any number of variables. Population studies will differentiate age, sex and race composition, its distribution and expected growth. This is an invaluable service in guiding educational leaders' decisions about future educational developmental activities. To support population projections, economic studies define an area's economic structure, the sources, types and distribution. The projected growth of an area depends on its future economic potential, employment opportunities and manpower needs. Studies conducted on social planning will provide the educator information on individual and group needs, values, desires and the perceptions of the peoples within his area as well as their social and economic status. These three types of studies may provide quantitative, as well as the possibility for qualitative, estimates on the kinds of schools, facilities, programs, services and staff which educators should be planning for to better meet and serve the true needs and desires of the people within a given area.

The physical and environmental studies provide educators information on the area's natural resources, its

water, soils, minerals, vegetation and climate. These studies also give detailed information on man-made resources by conducting studies on the area's civic, cultural, historical and recreational buildings and other structures, and the different types of residential areas. Transportation and studies of other networks of communication also add needed information to the educator's overall understanding of his service area.

As educators use this framework to develop a more complete understanding of their service area, they can become more involved in the planning process and help to incorporate the goals and objectives of the education system into the comprehensive plan. The more total the planning process, the more sub-systems involved, the greater the returns to the people.

Question V: How can this framework help to bring about better understanding and cooperation between educators and planners as they move toward achieving the optimal goals for an area in a practical, realistic manner?

The answer to this question lies in the cooperative efforts that can take place between planning and education through a deeper understanding by each of the other's work. The kinds of activities that will emerge will coordinate the efforts of both planners and educators as they attempt to achieve the optimal goals for an area in a practical, realistic manner.

This study indicated throughout that education has much to gain from the process of planning. It also emphasized that the process of planning could never be complete unless the needs, desires, goals and objectives of education were included within it. This can best be accomplished through the efforts of educators working with planners towards the common end of providing needed input into the total process of a very important part so that its needs are met within the process.

Discussion

The framework developed in this study should provide the educational leaders of an area, whether employed by that area or serving on a consultant basis, the necessary information to help them become more accountable for those educational planning activities fiscal and physical in nature. While passing millage elections and expanding building programs are both necessary, the undue amount of time presently spent on these activities hinders the effectiveness of educational leadership. Involvement in the comprehensive planning process will serve to increase the effectiveness of fiscal and physical educational planning activities while giving the educational leader added time for educational pursuits.

The increased knowledge and understanding acquired by involving the educational system within the

comprehensive planning process will make it more accountable for monies spent, especially on building programs. This will be accomplished through the use of the basic studies and data collections utilized by the comprehensive planning process allowing a deeper understanding of the projected growth potential and needs of the area being served by an educational system.

It is also not unrealistic to predict that in the near future most of the educational fiscal responsibilities will be absorbed into a Program Planning Budgeting System approach which will also be an integral part of the planning process. What then does all this say to the educational planner? It urges him to face realistically that society is presently in a stage of development that is moving from ad hoc planning activities to those of a more comprehensive nature. These activities are demanding that the process of education should be a continuous systematic, action-oriented set of operations, which utilize and coordinate those social, economic, physical and political forces of society that move the educational system toward the achievement of its goals and objectives, while constantly evaluating itself and making necessary changes. For this to be accomplished education, as well as the other sub-systems of the larger whole, must join the total comprehensive planning process.

Educational planning of a comprehensive long-range nature is presently at the first phase of development within the context of the larger process. In relation to the framework developed in this study, educational planning is presently trying to identify and define its principles and practices. School districts are beginning to engage in voluntary dialogue to exchange ideas, gain information and identify areas where cooperation may exist between districts. They are beginning to identify the social, economic, physical and political sectors where activities may be coordinated and synthesized. School districts are beginning to see that educational planning programs should not be building programs focusing solely upon satisfying population concentrations, but rather should totally interrelate the whole of an area's resources.

Educational authorities, school administrators and school boards are now beginning to think in terms of long-range region-wide educational planning endeavors, especially within metropolitan areas. The numbers of these people are small but they are increasing as new and constant demands are being placed upon them. This, linked with many already successful cooperative educational activities, such as special education programs, regional vocational schools, community colleges, computers, educational television, library and other media and auxiliary

facilities, and cooperative action in teacher recruitment and in-service education, is changing peoples' thinking towards looking at the advantages of comprehensiveness and reducing fears about giving up autonomous activities.

The current recommendations for educational reform in the State of Michigan suggest that educational planning practices and activities may well be changed in the near future, especially those concerned with administrative, organizational and financial areas. The basis for these recommendations is the "Thomas Report," (School Finance and Educational Opportunity in Michigan). Although the report is concerned with education, the entire report actually deals with the process of planning. This report and the "Governor's Educational Reform Package" cite Michigan as a leader in educational reform. They suggest that educational planning may eventually become part of the total comprehensive planning process. Thus emphasis is given to the strong need for a better understanding of this process.

Assimilation of educational planning into the total process will not happen in the near future, but the foundation is being laid. More and more educational activities are being assumed by offices of planning coordination and bureaus of budgets. The methods and policies to implement the recommendations cited in both the "Thomas Report" and the "Governor's Educational Reform Package" are presently being discussed.

Recently the Office of Planning Coordination of the State of Michigan published A Chronology of Educational Reform in Michigan (see Appendix A). It is extremely significant that an office of planning coordination would publish a document dealing with education and also significant that this would be financed by 701 funds.¹

Currently, the State Department of Education's Reorganization Section is engaged in conducting workshops to establish communication between the state department and local school districts on reorganization to provide feedback on legislative and state department actions on school reorganization, to provide clarification on various bills and to obtain various data related to school district reorganization. This interaction suggests that a bridging between planning and education is already underway.

These activities may be a tremendous asset to education for they finally allow the educational leaders of an area to become more involved in the educational leadership roles so necessary today, for example, staff development, curriculum improvement, research and evaluation and public relations. It is hoped that the understanding obtained from this framework will enable education to make valuable contributions to total planning efforts, so that in the end, the resulting comprehensive plan will truly

¹These funds are federal monies offered to the states for planning activities. They are authorized under the Housing Act of 1954 (Public Act 560, Title VII, Section 701).

include the means for implementing educational needs and desires in a practical, realistic manner. It is hoped this will keep economic responsibility and accountability from becoming the main objective of the educational system, and help preserve humaneness and individual freedom through comprehensive planning toward humanistic goals. This may best be accomplished by incorporating the "true" needs and desires of the various sub-systems into the larger process.

For: The best defense against planning--and people do need a defense against planners--is to become informed about the plan that is indeed existent and operating in our lives; and to learn to take the initiative in proposing or supporting reasoned changes. Such action is not only a defense but good in itself, for to make positive decisions for one's community, rather than being regimented by other's decisions, is one of the noble acts of man.²

Implications for Further Study

The following are suggested for further study.

1. A companion study is needed to develop a framework of the educational process to deepen the understanding and awareness of educational needs, desires and problems, on the part of comprehensive planners, government officials and others engaged in activities that affect education.

²Percival Goodman and Paul Goodman, Communitas: Means of Livelihood and Ways of Life (New York: Vintage Books, 1960), pp. 10-11.

2. A study of the comprehensive planning process, through the use of the framework established in this study, is needed to determine further educational implications.
3. Studies are needed to:
 - a. identify an area where good comprehensive planning exists and, through the use of the framework done in this study, examine the practicality of its use to educators in understanding their service area and its usefulness in helping them become involved within the planning process for better educational planning.
 - b. review the kinds of cooperative planning activities presently being conducted in metropolitan regions for educational implications.
 - c. identify an area with a well developed comprehensive plan to determine to what extent the goals and objectives of the educational system within that area have been included within the comprehensive plan.
 - d. strengthen ties between educational planning and comprehensive planning. This may best be accomplished by establishing a framework of

the process of education to enhance planners' awareness of educational problems and needs.

- e. determine the effectiveness of using the planning process to ease physical and fiscal responsibilities of educational leaders.

4. Survey studies are needed to:

- a. identify which school districts are presently involved in or are using planning agencies and what educational implications are derived from these studies.
- b. determine the extent of this involvement.
- c. determine the extent to which the planning agencies helped in educational planning.
- d. determine the attitudes of educational leaders concerning the kinds of cooperative planning activities suggested in this study.
- e. determine what further information is needed to make educators more aware of the benefits derived from involvement in the planning process.

5. Studies are needed concerning the reorganization of school districts in Michigan especially with reference to the recommendations made in the "Thomas Report" and the "Governor's Educational Reform Package."

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APPENDICES

APPENDIX A

1. Letter from Gaylord H. Yund,
State Planning Director,
State of Michigan
2. A Chronology of Educational
Reform in Michigan. First
Section.

STATE OF MICHIGAN

WILLIAM G. MILLIKEN
Governor



EXECUTIVE OFFICE

BUREAU OF POLICIES
AND PROGRAMS
OFFICE OF
PLANNING COORDINATION
Lewis Cass Bldg.
Lansing, Michigan 48913

May 11, 1970

Mr. George Stansbury
College of Education
Michigan State University
East Lansing, Michigan 48823

Dear Mr. Stansbury:

I hereby authorize you to use any part of our publication entitled
"A Chronology of Educational Reform in Michigan" in your doctoral
thesis, provided adequate source citation is referenced.

Sincerely,

A handwritten signature in cursive script, reading "Gaylord H. Yund".

Gaylord H. Yund
State Planning Director

aa



ABSTRACT

TITLE: Educational Reform in Michigan

AUTHOR: Office of Planning Coordination

SUBJECT: Education Reform
Education Assessment
Education Finance

DATE: January, 1970

**LOCAL PLANNING
AGENCY:** Office of Planning Coordination, State of Michigan

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ABSTRACT: On following two pages

ABSTRACT

The Michigan Legislature authorized an investigation into the financing of elementary and secondary education. The report, entitled "School Finance and Educational Opportunity in Michigan" was submitted in December of 1967. In April, 1969, Governor William G. Milliken established a Commission on Educational Reform to review the proposals made by the legislative study, as well as other pertinent information; and to develop a specific set of recommendations for legislative action. A professional staff, a Citizens Advisory Council, and a series of public hearings were utilized in determining the recommendations.

The recommendations of the Educational Reform Commission are:

1. Abolish the partisan elected Board of Education in favor of a State Superintendent of Public Instruction appointed by the Governor.
2. Reorganize present intermediate school districts, assign them specific responsibilities, fund them by state appropriations, and have them serve in closer coordination with the State Department of Education.
3. Reorganize local school districts below a specific size.
4. Establish a state-wide property tax for funding school operation.
5. Establish a "classroom unit" method of distributing school operational funds.
6. Expand the state-wide pupil assessment program and provide program assistance based on need.
7. Provide funds for paying lay teachers' salaries for secular subjects in the non-public schools.

Other recommendations include: (1) a 1970-71 school state-aid bill; (2) necessary revenue measures; (3) a legislatively appointed committee on teacher certification, evaluation, training, and incentives; (4) establishment of neighborhood education centers ("street academies"); (5) a study on building utilization; and (6) a study on manpower needs, training, and utilization.

These recommendations are incorporated into two constitutional resolutions and ten bills. They are currently being considered in the Michigan Legislature. Planning continues for enacting and implementing this legislation.

E D U C A T I O N A L R E F O R M I N M I C H I G A N

Office of Planning Coordination
Gaylord H. Yund, Director

Bureau of Policies and Programs
James C. Kellogg, Director

WILLIAM G. MILLIKEN, GOVERNOR

Urban Planning Assistance Project Michigan P-272 Work Item I.1.1

January, 1970

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Special Message to the Legislature on Education

Summary of Public Hearings and Tabulation of Opinions
Received

Citizens Advisory Group

The Report of the Governor's Commission on Educational
Reform

Special Message to the Fall Session of the Legislature
on Educational Reform

Analysis of Educational Reform Bills and Copies of the
Educational Reform Bills

A REVIEW OF EDUCATIONAL REFORM IN MICHIGAN

I'm convinced that 20 years from now we'll look back at our school system today and ask ourselves how we could have tolerated anything as primitive as education today. I think the pieces of an educational revolution are lying around unassembled, and I think we're going to put them together in the next few years.

--- John Gardner

The State of Michigan has attempted to improve the quality of life for its youth and people by reassembling the structure, finance, and services of education into a new configuration. The vehicle for change was a Governor's Commission on Educational Reform from which recommendations for legislative action stemmed. The report to follow reviews the three phases of educational reform:

1. The Process and Product of the Governor's Commission on Educational Reform.
2. The Executive Recommendations and Legislative Action on Educational Reform.
3. The Future of Educational Reform.

THE PROCESS AND PRODUCT OF THE GOVERNOR'S
COMMISSION ON EDUCATIONAL REFORM

The Need for Educational Reform

The need for educational reform did not appear suddenly in Michigan. In July of 1966 Dr. Ira Polley, State Superintendent of Public Instruction, made these observations to the State Board of Education:¹

1. The State of Michigan is committed to the proposition that the young people in all Michigan communities are entitled not only to educational programs equal to the best now provided in the State but second to none in the Nation.
2. The availability of high quality comprehensive programs and services should not--indeed cannot--be dependent upon fortuitous factors and circumstances.
3. Educational programs and services provided by the school districts in Michigan vary tremendously from district to district, not only in the quality of these, but in the degree of comprehensiveness of these program offerings.
4. The variation, from school district to school district, in the quality and comprehensiveness of program offerings is due mainly, although not exclusively, to the variation in all financial resources available to the districts.
5. Financial assistance to school districts from state appropriations is one variable in the total financial resources available to these; thus the amounts and means of providing state financial assistance to school districts must be viewed as an important, if not the most important factor in the provision of high quality comprehensive programs and services in all school districts in Michigan.
6. Since all state financial assistance to the public schools since 1957 has been made by "piece-meal" amendments to Act 312 of the Public Acts of 1957, which is commonly known as the "State School Aid Act," the time has arrived for an objective study of the means, the kinds, and the extent of financial aids provided to public school districts from that source in relationship to all other sources.

1. Prepared statement of Dr. Ira Polley, which was presented to the State Board of Education on July 27, 1966.

The Michigan Legislature authorized an investigation into the financing of elementary and secondary education under Act 285, Public Acts of 1966. The study began on October 1, 1966 and the final report was presented to the State Board of Education in December, 1967. J. Alan Thomas from the University of Chicago was responsible for coordinating the research and writing the report. The report is entitled, "School Finance and Educational Opportunity in Michigan."²

The report expressed the following conclusions:³

1. While enrollments in the elementary grades show signs of leveling off, and secondary enrollment continues to grow, both adult education and pre-kindergarten enrollments have been expanding.
2. There is great variation in the educational opportunities available to students in the State of Michigan.
3. There exist critical problems in the financing of urban education. These problems demand adequate financial support from the citizens of the state.
4. In comparison with many other states, vocational education in Michigan is inadequately supported from state funds. Full programs of special education services are not available in certain parts of Michigan. Even where they are available, they may not be provided at the level which is to be desired.
5. The present procedures for the financing of school construction are very costly.
6. The pre-constitution portion of the teachers' retirement funds is presently in serious financial difficulty.
7. Although there has been progress in the reorganization of districts, problems of inequality in educational opportunity and inefficient operation resulting from the persistence of very small districts are still in existence.

2. J. Alan Thomas, School Finance and Educational Opportunity in Michigan (Lansing, Michigan: Michigan Department of Education, 1968).

3. Ibid, pp. 323-24.

8. The procedures for distributing state aid to school districts are overly complex, and do not accomplish the purpose of equalizing educational opportunity.
9. A revenue crisis also faces Michigan's non-public schools. There is a proportional shift in the student body from non-public to public school enrollment.

The report went on to suggest alternative actions to improve the degree of educational opportunity and the method of financing education. The report, however, was not designed to be a "Blueprint for Action." Indeed, no action was taken to even attempt change in educational structure, finance, and services until April, 1969.

The Establishment of the Governor's Commission on Educational Reform

Governor William G. Milliken, in a Special Message to the Legislature on Education,⁴ reiterated the problems of Michigan education. In addition, he proposed the establishment of a Commission on Educational Reform. It would be the task of the Commission to foster a climate for educational reform by reviewing previous research and proposals, by encouraging new presentations of ideas and alternatives, and by developing a specific set of recommendations to serve as the basic guidelines for legislative action.

In particular, the Commission was charged by the Governor to develop:

1. Specific goals and objectives of the educational system, criteria for assessing its accomplishments, systems for insuring its accountability. For example, we may need to set a basic standard for literacy.
2. More effective use of school facilities, so they will better serve students, and the total community.

4. The full text of this message is included in this report. See Appendix A.

3. Improved utilization of the latest educational technology, such as closed circuit television.
4. Incentives for developing and rewarding excellence in teaching, and for increasing teacher productivity.
5. Improved management, which would include not only administration, but also consideration of optimum size of school districts.
6. A proper balance of emphasis on college preparatory and vocational education, related directly to the real needs of the students and society.
7. A more equitable and more adequate system of financing education.⁵

The Governor, who served as Chairman of the Commission on Educational Reform, named these members:

1. Daniel B. Burke of Bloomfield Hills, executive vice-president of Capital Cities Broadcasting Corporation and general manager of WJR; member of the communications committee of New Detroit, Inc.
2. William M. Day of Grosse Pointe, chairman of the board and chief executive officer of Michigan Bell Telephone Company, and former chairman of the educational subcommittee of New Detroit, Inc.
3. Mrs. Robert Foerch of Dearborn, President of the Michigan League of Women Voters, and former member of the Citizen Advisory Committee for the Michigan School Finance Study (Thomas Study).
4. Dr. James W. Miller of Kalamazoo, President of Western Michigan University; former State Comptroller and Secretary of the State Administrative Board; President of the Michigan Association of Colleges and Universities; and chairman of the 1960-63 Governor's Commission on Constitutional Reform.
5. Wilbur C. Munnecke of Leland, former vice-president and general manager of the Chicago Sun-Times and Chicago Daily News; former vice-president of the University of Chicago and of Encyclopedia Britannica; former member of the National Manpower Council at Columbia University; now consultant to Field Enterprises, Inc.

5. "Special Message to the Legislature on Education," April 3, 1969, p. 5. (see attached)

6. Otis M. Smith of Detroit, former Supreme Court Justice, Auditor General and member of the Michigan Public Service Commission; past chairman of the State Board of Education's Committee on Education for Health Care; now on the legal staff of General Motors Corporation, and a regent of the University of Michigan.

Dr. Robert Jewell, from the University of Chicago, and James Phelps, from the University of Michigan, were selected as the Commission staff. Both individuals had educational training and experience.

The Activities of the Commission on Educational Reform

The recommendations of the Commission were the products of a series of public hearings, the activities of a Citizens Advisory Council, staff work, and the actual Commission meetings.

Three public hearings were held around the State of Michigan. The sites were Marquette, in the upper peninsula, Detroit, and Lansing, the state capitol. Over one hundred and twenty statements were received through this process. A "Summary of the Public Hearings" and a "Tabulation of Opinions Received" were compiled for distribution.⁶

The public hearings served to give a perspective to the educational problems of Michigan and allowed the Commission to hear and evaluate the many suggestions made by educators and non-educators alike.

In order to maintain a close communication with the educational and interested non-educational communities, a Citizens Advisory Council was established. The council was composed of forty-three individuals representing a wide range of educational interests and

6. Both of these documents are included in this report.
See Appendix B.

backgrounds.⁷ There were a number of educators on the council serving to express their views and to represent the views of their organizations. In addition, non-educators with some particular expertise regarding education or who represented concerned organizations were included. An inspection of the list of council members will verify the outstanding character and the representativeness of the group.

It was the council's function to review and react to proposals as well as make proposals of their own. As time progressed, they reviewed and reacted to the ideas and alternatives which were emerging from Commission deliberations.

During the entire tenure of the Commission it was the task of the staff members to coordinate and communicate information and suggestions between the public, the Citizens Advisory Group, and the Commission.

Early in the life of the Commission the members met periodically to review the information and suggestions. Later, the task was to formulate alternatives, and finally, the Commission had to reduce the number of alternatives into a reform package. This process was far more difficult than its description implies. The number of alternatives and their interrelation were so numerous and complex they defied simple and immediate solution.

The Report of the Commission on Educational Reform

On September 30, 1969 the report of the Governor's Commission on Educational Reform was submitted to the people of Michigan.⁸ Realizing

7. A list of the Citizens Advisory Group is included in this report. See Appendix C.

8. The "Report of the Governor's Commission on Educational Reform" is included at the end of this report. See Appendix D.

the difficulty in bringing immediate reform to the educational system, two phases, each with its own set of recommendations, were defined. The first phase defined long range reform goals and the second outlined the immediate legislative and Executive actions which would hasten the implementation of reform.⁹

The first phase recommendations were:

1. State Administration

To fix responsibility for operation of the Department of Education structure and the position of State Superintendent of Public Instruction be abolished by Constitutional amendment and replaced by a State Director of Education appointed by the Governor, subject to Senate confirmation. This Constitutional amendment should be submitted to voters in the primary election of August, 1970.

2. Regional Administration

To strengthen further the organizational structure and responsibility of the State Department of Education, we recommend that intermediate school districts be discontinued and replaced by 10-15 regional education areas. The boundaries of these regions should be set by a special commission, with boundaries subject to approval of the Legislature.

The new regions we envision should operate in a well-defined structure of accountability and responsibility. To them should be assigned specific functions for which an adequate level of funding should be assured by the state. These functions should include, among others, special education, vocational and technical education, transportation, data processing, central business services, curriculum consulting, and budget review of constituent districts.

The chief executive officer of each region should be appointed by the State Director of Education and should be required to utilize advisory committees appointed by the constituent school districts.

3. Further Reorganization of Local Districts

To strengthen the regional administration, and to provide wider educational opportunities, we recommend further

9. "Report of the Governor's Commission on Educational Reform", September 30, 1969, pp. 7-16. (see attached)

consolidation of local districts. To accomplish this, the Educational Reorganization Committee should be reactivated and should be given legislatively approved guidelines. These guidelines should include the merging of all K-6 and K-8 districts into K-12 districts and further reorganization of K-12 districts. In further reorganization of K-12 districts, consideration should be given to such factors as appropriate size, density of population, distance traveled by pupils, location of physical facilities, and the need to improve social and racial integration.

This reorganization should have two phases. First, there should be a period when, within legislative guidelines, affected districts have an opportunity to reorganize voluntarily. Second, in those cases where voluntary efforts fail, there should be proceedings which result in the state reorganization committee ordering reorganization.

4. Financial Support of Education - A State Responsibility

We recommend:

- a. that the constitution be amended to enable the Legislature to collect a uniform statewide property tax for school operating purposes in place of the existing local property taxes;
- b. that measures be taken to assure that property assessment practices are improved before the statewide school property tax becomes effective;
- c. that such a uniform state tax should be set at a rate somewhere below the statewide average for school operating purposes to provide property tax relief where it is most needed;
- d. that the existing constitutionally imposed millage maximums on local property taxes be correspondingly reduced to reflect the substitute of a state property tax for school operations;
- e. that, if local option property taxes are permitted by the Legislature for funding meritorious educational enrichment programs, the state, through legislation, should guarantee an equal per mill yield for all districts, impose a maximum on the number of mills that can thus be levied, and exclude teacher salary increases from the enrichment purposes for which the additional money may be spent.

5. Equitable distribution - The Budget Process

We recommend that in fiscal 1972-73, a budget system be adopted for the elementary, and secondary school system based,

at the district level, upon the classroom unit and employing such factors as teacher-student ratios, professional base salary rates adjusted by experience, education and region, and overhead costs keyed to professional costs and based at the regional level on students and programs.

6. Educational Evaluation

We recommend that the Legislature allocate funds immediately to develop and administer a statewide educational evaluation program. These funds should be used to contract for the services of an agency which has the human and material resources to develop such a program. Such a program should provide pupil testing at several grade levels and in many subject areas but impact heavily on the early grades. The evaluation should be the basis for allocating additional funds to pupils with learning problems and subsequent evaluations should be conducted to determine the effects of such additional funds on the learning levels of these pupils.

7. Non-Public Schools

The Commission recommends that the Legislature approve salary support for certified lay teachers of secular subjects in established non-public schools according to the following plan: 50% of such teachers' salaries for that portion of the time they teach secular subjects during the 1970-71 and 1971-72 school years, and 75% during the 1972-73 school year when other recommendations for educational reform will be fully effective.

We further recommend that the maximum allowance of aid to non-public schools in future years shall in no case exceed 2% of the total public school budget in Michigan; that by 1972, non-public schools receiving state aid be subjected to the same evaluation, accountability, and quality controls as public schools in Michigan and that a responsible legislative committee be appointed to determine the effects of this provision if accepted, on racial, ethnic, and socio-economic segregation in Michigan education with a view toward making recommendations designed to reduce such segregation in conjunction with state aid to Michigan's non-public schools.

The second phase recommendations were:

1. The Commission recommends that the Legislature, during its fall session:
 - a. Pass a State Aid Act for the 1970-71 school year providing substantially higher payments for program improvement and a substantial increase in the deductible millage to begin building toward a uniform property tax rate. The membership total

should be increased by about \$100 million, and about \$25 million should be allowed for aid to non-public schools, as outlined earlier. About \$500,000 should be included for setting up the regional districts. Other needed increases would go for remedial reading, special education, transportation, environmentally disadvantaged, intermediate districts, and retirement. Total state aid fund costs for 1970-71 are estimated at \$1,035 million, as compared with this year's \$849 million.

- b. Pass needed revenue measures, based on ability to pay.
- c. Pass resolutions enabling the people to vote on constitutional amendments needed to improve the state educational structure and permit the state to levy a uniform operational millage for schools, both as outlined earlier in this report. These amendments should go on the ballot in August, 1970.
- d. Pass the entire educational reform package, so implementation can begin immediately.

2. Also, the Commission recommends that the Governor:

- a. Ask the Legislature to appoint a joint committee to recommend appropriate action on teacher certification, evaluation, training, and incentives.
- b. Ask the Legislature to approve an extensive pupil testing plan which will establish levels against which pupil progress can be measured.
- c. Propose, as soon as feasible, neighborhood education centers, street academies and other means of meeting educational problems, with particular reference to drop-outs. This should include special attention to migrant, non-English speaking, and economically disadvantaged children.
- d. Propose means of achieving fuller utilization of available buildings and facilities.
- e. Propose new approaches to vocational and technical training keyed to regional operation and allowing maximum flexibility, which would include and, indeed, encourage the practice of contracting with business, industry, and other agencies for job training and other educational functions.

THE EXECUTIVE RECOMMENDATIONS
AND LEGISLATIVE ACTION

Executive Recommendations

In October, 1969, Governor William G. Milliken gave a Special Message to the Fall Session of the Legislature on Educational Reform.¹⁰ In this message the Governor outlined the two Constitutional resolutions and the ten bills which he was recommending for legislative action.¹¹ They were:

Constitutional Resolutions:

1. State Organization: To abolish the State Board of Education and replace it with an appointed State Superintendent of Public Instruction.
2. State Property Tax: To institute a statewide property tax and eliminate local levies for school operation.

Legislative Bills:

1. Regional Organization: To establish regional school districts to replace the existing intermediate school districts.
2. Local Reorganization: To establish a commission to reorganize local school districts to a minimum size of 2,000 pupils allowing for extenuating circumstances.
3. 1970-71 State Aid: To increase the 1970-71 state school spending to \$1,027 billion from the current level of \$849 million. (Includes an estimated \$25 million for aid to non-public schools.)
4. Future Budgeting: To set up a budget review system wherein local school districts submit budgets to regional boards, to the State Department of Education, to the Executive Office, and finally to the Legislature.
5. Enrichment Levy: To allow a three mill "enrichment" levy by local districts when the statewide property tax takes effect.

10. The full text of this message is included in this report.
See Appendix E.

11. A summary of the resolutions and bills are included within the report; copies of the actual bills are at the end of the report.
See Appendix F.

6. Neighborhood Centers: To spend \$100,000 this fiscal year to encourage neighborhood social and cultural centers for school dropouts.
7. Assessment: To spend \$250,000 this fiscal year to expand the current program of pupil testing and to fund innovative improvement programs.
8. Teacher Incentive Program: To spend \$50,000 to set up an advisory board which would work with the Department of Education over a three year period to develop teacher incentive programs.
9. Property Tax Credit: To cancel income tax credits for property tax payments and raise \$116 million for schools.
10. Cigarette Tax: To raise the cigarette tax from 7 to 12 cents per pack.

Legislative Action

The following summarizes the legislative actions taken on the various resolutions:

1. State Organization

Senate: The plan for an appointed State Superintendent was amended to have a five-man board appointed by the Governor. This resolution failed to receive the two-thirds vote.

House: Still in committee.

Comment: Several other resolutions proposing various sizes and elements of an appointed State Board of Education have been introduced in both Senate and House.

2. State Property Tax

Senate: The rate was amended down from 16 to 12 mills but failed to receive the required two-thirds vote.

House: Still in committee.

Comment: An alternative for a 20 mill statewide levy with a \$3,000 homestead exemption was also defeated.

The following is a summary of the legislative actions taken on the various bills:

1. Regional Organization

Senate: A substitute was adopted changing the selection and powers of the regional superintendent and board. This bill was sent back to committee before a vote was taken.

House: Still in committee.

Comment: The financing of the regional service areas has not been resolved. It was intended that they would be fully state funded. Action on this bill will not take place until some questions of long-range school finance are answered.

2. Local Reorganization

Senate: Reported to the Senate floor but not voted upon.

House: Still in committee.

Comment: Amendments have been offered to mandate reorganization to non-kindergarted through 12th grade districts rather than using the suggested 2,000 pupil guideline.

3. 1970-71 State Aid

Senate: Approved a \$1.001 version of the bill.

House: The Education Committee approved a \$1.065 version and the Appropriations Committee a \$1.024 version. The bill was under consideration when the House adjourned in December, 1969.

4. Future Budgeting

Senate: Still in Education Committee.

House: Still in Education Committee.

Comment: This bill predicates a greater state role in school finance, an issue which has not been fully discussed.

5. Enrichment Levy

Senate: Still in Education Committee.

House: Still in Education Committee.

Comment: This bill is closely related to the budgeting bill and will probably be considered jointly.

6. Neighborhood Centers

Senate: Still in Education Committee.

House: Passed in the House.

7. Assessment

Senate: Reported out of Education Committee.

House: Passed in the House.

8. Teacher Incentive Program

Senate: Passed the Senate Education Committee and pending on the floor.

House: Passed in the House.

9. Property Tax Credit

Senate: Passed on the floor.

House: Passed in committee but defeated on the floor.

10. Cigarette Tax

Senate: In Taxation Committee.

House: Amended to 4 cents and passed on the floor.

THE FUTURE OF EDUCATIONAL REFORM

Social change is not necessarily a rational process and, therefore, it is not predictable. However, the problems which have been identified by the "School Finance and Educational Opportunity in Michigan" study and by the Governor's Commission on Educational Reform are accepted, in the most part, as being accurate. Both the public and educational communities share in this assessment. The disagreement is over the solutions to these identified problems. The problems will not be eliminated, most agree, until significant and meaningful changes are instituted and that these changes can only be brought about by legislative action.

The educational problems of Michigan which must be dealt with can be expressed in these general categories:

1. Adequacy and equality of educational opportunity.
2. Fiscal adequacy and equity of tax burden.
3. Placing responsibility, authority, power, and accountability effectively at the various levels of the educational hierarchy.
4. Reducing employer-employee conflict.
5. Providing a climate for innovation in instructional practices.

At the time of this writing, there appears to be a favorable climate for educational reform. The leaders in the Legislature have agreed to devote the first month of the new legislative year to the unfinished issues of educational reform. The press coverage continues to be extensive setting a high level of expectancy among public and educational interests. Educational and civic organizations continue to devote their meetings to the question of educational reform. As a

result, numerous refinements to the original proposals have been suggested and, in addition, some major alternatives have been recommended.

On the other hand, educational reform has not been effectuated in Michigan. Although the bills are moving through the legislative process, not one has yet emerged on the Governor's desk for signature. There is a continuing need for developing and disseminating relevant information for legislative decision-making. Undoubtedly, the proposed bills and resolutions will not end the need for educational legislation. Even after this legislation is enacted, the problem of implementation exists. A significant task still looms in the future--one of planning and achieving continual educational reform.

APPENDIX B

1. Letter to Superintendents from the State of Michigan, Department of Education.
2. Schedule of Workshop meetings.
3. Samples of workshop questions.
4. Map of District Reorganization for Workshop meetings.

DEPARTMENT OF EDUCATION

Lansing, Michigan 48902



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Acting Superintendent
of Public Instruction

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Ex-Officio

May 1, 1970

Dear Superintendent:

The State Department of Education is requesting your presence at a workshop on reorganization. The workshop will be held on Wednesday May 13, 1970, at 9:30 a.m. The coordinator will be Dr. William J. Rogers, Superintendent of the Ingham Intermediate School District and the location will be the Ingham Intermediate Offices at Mason, Michigan.

The school district Reorganization Section of the Department of Education is currently involved in long-range planning relative to reorganization. It is generally assumed that this planning has implications at the local, intermediate and state level; hence, requiring communication and cooperation between the three levels.

The above-mentioned workshop is one of a series. The proposed agenda is administrator oriented, however, discussions may be broad enough to interest school board members or other concerned educators.

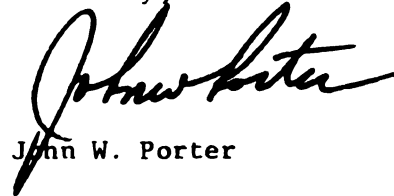
It is assumed also, that pertinent subjective and objective data concerning the attitudes of local and intermediate superintendents towards various reorganization proposals that have been introduced in recent bills and by the State Board of Education can be obtained. Further, there is a possibility of establishing liaison committees for the primary purpose of providing feedback to constituent districts. (Note: All workshops have been scheduled on a geographical basis.) The specific purposes of the workshops will be to:

1. Establish communication between the state department and local districts on the issue of reorganization.
2. Provide the local district up-to-date feedback of legislative and state department of education action relative to school district reorganization.

3. Obtain the general reaction (at the local level) to various reorganization proposals.
4. Provide direct interaction for the purpose of sharing clarification of terminology used in various bills, and
5. Obtain additional data relative to local school district reorganization.

We will appreciate your presence at this meeting. Please advise us and/or your meeting coordinator of your intention relative to this request. If you have any questions, please contact Mr. David L. Donovan, of the Reorganization Section, State Department of Education or your meeting coordinator. A list of coordinators, tentative workshop agenda, and scheduled workshops to date is attached.

Sincerely,

A handwritten signature in black ink, appearing to read "John W. Porter". The signature is fluid and cursive, with the first name "John" being more prominent.

John W. Porter

Attachments

WORKSHOP MEETINGS

<u>No.</u>	<u># of Dist.</u>	<u>Total Dist.</u>	<u>Possible Site</u>	<u>Coordinator</u>
1. Western U.P.	25	28	Kingsford	Borga (April 23, 1970)
2. Central U.P.	26	40	Escanaba	McClintock (April 21, 1970)
3. Eastern U.P.	13	14	Rudyard	Speicher (Feb. 25, 1970)
4. COP	23	29	Gaylord	Hanson (Feb. 23, 1970)
5. Upper W.	24	28	Traverse City	Gelston (Feb. 5, 1970)
6. Upper E. & Mid. Cent.	21	40	Higgins Lake	Goldbold (Apr. 16, 1970)
7. West Central (Except Kent)	23	40	Muskegon	Owens (May 4, 1970)
8. Low Central	42	70	Mason	Rogers (May 13, 1970)
9. Low E. Central	26	57	Flint	Davis (May 14, 1970)
10. Thumb	33	47	Caro	Scott (April 9, 1970)
11. S.W. Corner	34	68	Berrien Springs	Barkmeier (Mar. 23, 1970)
12. S. & S.E. Corner (Except Wayne Co.)	33	93	Adrian	Porter (Apr. 7, 1970)

Number of districts is an estimate - includes all nonhigh schools

REORGANIZATION MEETING

1. What factors should be considered in the development of criteria for school district reorganization? What priorities should be assigned?

(Examples of criteria used in developing guidelines previously have included: operate K-12 program, economy of operation, potential for quality and breadth of educational programs, size of enrollment and/or area, density and trends of population, transportation time, segregation, existing school facilities, natural community of interests and socio-economic levels, potential to use personnel and facilities to maximum efficiency, natural physical barriers, existing political boundaries, local financing ability)

2. What responsibilities should the local district, intermediate district and state department assume for long range and regional educational planning?
3. Assume future school district reorganization to achieve a high level educational potential. What in your opinion would be the ideal area plan for your district?
4. In what ways can the state department work cooperatively and effectively with local districts on reorganization?

Reorganization Meeting - Evaluation

Your evaluation of today's meeting will be appreciated. Also, any suggestions for improvement.

REORGANIZATION WORKSHOP

A.M.

1. What factors should be considered in the development of criteria for local school district reorganization? What priorities should be assigned?

(As examples: The bill contains criteria which shall be used in developing guidelines as follows: Operate K-12 program, reasonable efficiency of operation, not of excessive enrollment or area, density and trends of population, transportation, use of school buildings, not promote segregation.)

2. The reorganization bill (H.B. 3883) under consideration in the legislature requires the development of curriculum guidelines and basic standards which constitute a minimum comprehensive offering. What should be included in the guidelines and standards?

(a) The curricular offerings

(b) The ability to develop a "local" curriculum.

(c) Effective and efficient utilization of personnel and facilities.

(d) Administrative effectiveness and efficiency.

REORGANIZATION WORKSHOP

P.M.

1. What future course would your school district take:
 - (a) Assuming passage of H.B. 3883 this year?
 - (b) Assuming no local reorganization bill from the legislature this year?
2. Assume reorganization of local and intermediate districts. What change in roles and functions would be necessary and/or desirable for each echelon:
 - (a) local, (b) intermediate, (c) state
3. In what ways can the state department work cooperatively and effectively with local districts on reorganization?

Reorganization Workshop - Evaluation

Your evaluation of today's meeting will be appreciated. Also, any suggestions for improvement.

REORGANIZATION WORKSHOP MEETINGS



* Because of the unique problems of organizational planning in urban areas, regions nos. 13 and 14 were not included in the first series of meeting on school reorganization.

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