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THE EFFECTS OF STATE BUREAUCRATIC REFORM EFFORTS ON THE ROLE OF THE LOCAL SUPERINTENDENT AND THE STRUCTURE OF LOCAL PUBLIC SCHOOLS

BY

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ABSTRACT

THE EFFECTS OF STATE BUREAUCRATIC REFORM EFFORTS ON THE ROLE OF THE LOCAL SUPERINTENDENT AND THE STRUCTURE OF LOCAL PUBLIC SCHOOLS

By

Wayne Loran Peters

The purpose of this study was to describe and explain the effect of State reform efforts on superintendents and on the organizational structure of public schools. The researcher has described the State reform efforts for the past twenty-five years and has argued that because of the impact of those reform efforts there have been changes in the superintendent's role and changes in the structural organization of public schools.

More specifically the study was subdivided into two general questions and five related exploratory questions. The first was "What is the effect of State reform efforts on the superintendent's role?" The second was "What is the effect of State reform efforts on the organizational structure of public schools?"

To identify how the State reform efforts had affected the role of the public school superintendent and the organizational structure of public schools, the researcher conducted interviews with 27 Michigan public school superintendents. Interview questions explored the changes in role and structure as they affected communications, finance, personnel, general administration and curriculum. The superintendents' responses were analyzed for the emergence of common themes or findings.

Concerning the first question, the conclusion is that the role of superintendent has

been significantly altered by the state reforms. The superintendent must educate diverse groups about the goals and consequences of reforms; generate support for the district's mission; encourage involvement with the schools and counter misinformation - often in an environment of public mistrust and apathy. Reforms have increased dissatisfaction and reduced the desirability of being a superintendent. He or she has greater responsibility, but less authority to direct either the things being done or the people doing them.

Concerning the second question, the answer is that reforms have forced schools to spend significant resources to inform a disinterested public. Reforms have increased workloads, limited expenditures, changed negotiations and affected other district operations. Districts seek new employees with different skills and attitudes, and devote substantial resources to retrain veteran staff. State reform efforts have clearly altered both the role of the superintendent and the organizational structure of the local school district.

DEDICATION

This dissertation is dedicated to my wife Sue for her years of patience, assistance, and encouragement in this project.

To my children, Heidi and Brad; the thousands of hours spent completing a Ph.D. were taken primarily from time I should have spent with them.

To my parents, Florence and Loran Peters, for always believing in me. The qualities of strength and determination needed to succeed in this enterprise - I learned from them.

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Chapter One

The researcher's purpose in this study was to describe and explain the effect of State reform efforts on superintendents and on the organizational structure of public schools. The researcher described the state reform efforts for the past twenty-five years and argued that because of the impact of those reform efforts, changes in superintendent's role and changes in the structural organization of public schools can be determined.

Chapter One includes an overview of the study, the historical background of the role of the superintendent, and the organizational structure of local public schools. This background forms the basis of the study and the recurring theme as postulated from the data. The chapter continues with an overview of role theory, exploratory questions and hypotheses, assumptions, limitations and attributes, and definitions of terms. It concludes with an organizational overview of the dissertation.

Introduction

The evolution of the role of the superintendent and the organizational structure of local public schools can historically be categorized into five periods; 1838-1890, 1890-1915, 1915-1930, 1930-1969, and 1969-present. Since the inception of the superintendency in 1837 to the mid 1960's, every period of change is significantly characterized by superintendents leaving the profession or losing their jobs due to their inability to adapt to a new organizational philosophy or organizational structure.

History of the Superintendent

Superintendencies were created when one-room schools grew to the size of eight to sixteen rooms and when the schools in each ward of a city were centralized to become one common district. In 1837 Buffalo and Louisville were the first school districts to appoint superintendents. By 1860, twenty-seven city school districts had superintendents.

Until about 1890, the position of school superintendent was neither a profession nor a career. It was usually but one of many jobs, in or out of education, which a man might hold during his working lifetime. Superintendents were often chosen specifically for their close ties or beliefs in the "revivalist Protestant-Republican ideology" of Horace Mann and rural America.

> By the turn of the twentieth century leadership in American public education had gravitated from the part-time educational evangelists who had created the common-school system to a new breed of professional managers who made education a life-long career and who were reshaping the schools according to canons of business efficiency and scientific expertise. (Tyack and Hansot 106)

These new leaders formed a nationwide network called (in a term of that time) "the education trust." From approximately 1890 to 1930, they worked to shift the philosophical foundation of school administration to a more business-like and scientific basis and prepare a new generation of full time professional educators.

Illustrative of these changes were the efforts of Elwood P. Cubberley, whose career spanned this era. Raised in rural Indiana, he began his work with a series of short-

term, unrelated jobs. He taught for a year in a one-room school before earning a degree in physics at Indiana University in 1891. In the next five years he taught at a small Baptist college, was professor of physical science at Vincennes University, and became president of Vincennes at age twenty-five. In 1896, at age twenty-eight, he became superintendent of schools in San Diego with no formal training in school administration. Typical of the times, he was questioned about his religious orthodoxy when he interviewed. He soon found that the Board micro-managed the schools and decisions were based on politics rather than sound educational practices. This experience probably influenced the rest of his career.

Two years later he became assistant professor of education at newly-formed Leyland Stanford Junior College, later to become Stanford University - where the education department had no respect from the arts and sciences departments, and the education faculty was ridiculed and shunned. He was given three years to make the field of education respectable or he and the department would be dropped. From then until his retirement from Stanford in 1932, Cubberley and other members of the educational trust, Charles Judd from the University of Chicago, Frank Spaulding from Yale, George Strayer from Teachers College at Columbia University and others worked to make the fields of education and administration accepted in the academic community by teaching them as a science. He created a network of graduates and helped place them in superintendencies. He gave over 1,000 public addresses about the new "science" and attracted enrollments to the fledgling university. He forged a power base beyond the university. In 1905, he

received his Ph.D. from Teachers College - considered the "West Point" of the education trust. He discovered and sponsored educational scholars, and from his own earnings and investments he funded a new education building at Stanford.

When Houghton Mifflin published an education series Cubberley edited 103 of the 110 texts, and wrote 10 of them himself. In one of them, State School Administration, he made observations about the relationship between the legislature and local districts which have relevance for this study:

> When one passes to a study of the legal provisions enacted by our different states for the organization, administration, and control of the schools in their various subdivisions, one is struck, especially in the district-system states, with the vast amount of detailed legislation that has been piled up. ...legislation - for which there is no real need, aside from the continuance of the district system itself - is still retained on the statute books and forms the subject for debate and amendment and change each time the legislature meets. (Cubberley 312-13)

When Cubberley began there was no such thing as a career in school administration; when he retired he was an elder statesman in the profession. He and others "gained the power to anoint the new and make it respectable, to define the new science of education." (Tyack and Hansot 127)

Closely paralleling the work of Cubberley and others to establish school administration as a science, was the widespread "efficiency" movement to administer public schools using new and popular business practices. From approximately 1900 to 1910, newspapers, public opinion and even education reports such as the American School Board Journal exerted pressure for this reform. It reached a peak in the years 1911-13,

and caused "wholesale resignations, dismissals and new appointments" of superintendents. In Education and the Cult of Efficiency, Raymond Callahan explained the reason for the rapid adoption of these business methods. "...when the schools are being criticized, vulnerable school administrators have to respond. The quickness of the response and the nature of the response depend upon the nature and strength of the criticism."

Superintendents quickly adopted the "business approach" in order to survive, and graduate schools of education added such courses to their administration curriculum. The result was that "...by 1925 the [superintendent's] position had more of the characteristics of a managerial job in business or industry than it did of an educational one in the schools." (Callahan 148)

The influence of the educational trust and the business movement had an effect on the administration of local schools which lasted well past World War II. A review of the literature from the 1950's and 1960's still shows the role described in terms of a checklist of duties and responsibilities which were primarily managerial:

1. To hire or discharge personnel.
2. To furnish leadership for personnel and delegate responsibility to them.
3. To provide for the inservice development of staff.
4. To plan for curriculum improvement.
5. To prepare budget and plan salary schedules.
6. To maintain discipline.
7. To maintain high attendance.
8. To make the school calendar and schedule classes.
9. To provide recreational opportunities for teachers.
10. To supervise all classrooms.
11. To supervise the hot lunch program.
12. To take the school district census.
13. To supervise district organization and consolidation. (Ayars 17-18)

Callahan considered this lingering influence to be a tragedy for the profession:

> The younger men coming into administration, say after 1918, accepted the prevailing conceptions and training as natural...and they in turn carried the business orientation to all corners of the nation and to their students, who did the same.
>
> The tragedy itself was fourfold: 1) that educational questions were subordinated to business considerations; 2) that administrators were produced who were not, in any true sense, educators; 3) that a scientific label was put on some very unscientific and dubious methods and practices; 4) and that an anti-intellectual climate, already prevalent, was strengthened. As the business-industrial values and procedures spread into the thinking and acting of educators, countless educational decisions were made on economic or on non-educational grounds." (246-47)

In the years prior to 1965, before unionism and collective bargaining, superintendents went to their local Boards to champion raises and better working conditions for teachers, and were responsible for the managerial tasks of running the local school district (Goldhammer 259, Marland 368). In those days superintendents had an aura of authority and were accustomed to being "the law" in their districts (Goldhammer 261).

Indicative of the years prior to the 1970's, almost all superintendents were white males. All too often people knew them only as distant authority figures who seemed to be responsible for whatever citizens didn't like about the schools (Burbank 25). Their families felt they were living in a "fishbowl" and were frequently subjected to pressures and even reprisals. Spouses were automatically expected to give up their own careers (if they dared have one) and follow the superintendent from job to job. The advent of collective bargaining ended the "benign father figure" image (Goldhammer 260). The superintendent now became the Board's representative in bargaining with teachers. For

the first time, the superintendent became openly involved in negotiations. No longer identified as the primary instructional leader; living with labor relations conflict became part of the superintendent's life.

The purpose of describing and explaining the educational reform movement of the past 25 years was to direct the focus of this study on how these changes may have affected the role of the local public school superintendent. Before the reform movement, the role involved monitoring and reporting inputs to the state, total allegiance to the guidance of the local board, paternalism toward staff and adherence to the local political and social agenda.

Because of the school reform movement, the role of a current local superintendent requires monitoring and reporting outcomes to the state, allegiance to the local board and at the same time compliance with scores of state requirements, a labor-management relationship with staff, and the implementation of a state-level social and political agenda which is often at odds with the local one. The differences in required skills and attitudes may signal a significant change in the role requirements of today's successful superintendent.

Several researchers predict that the role requirements of the superintendent in the 1990's will be far different than the role elements that existed in the 1960's and 1970's. For example, Konnert and Augenstein suggest that among the role changes will be a greater demand for the superintendent to become a mentor and coach, and a shift away from a hierarchial authoritarian which will promote empowerment of employees and

promote their growth and ownership in their jobs. Strumpf explains the superintendent's changing role in the following terms:

> What the environment will demand is a willingness to manage tension and embrace change. . .Efficiency and effectiveness will rest on the ability of managers to embrace change. Being adaptive will no longer be enough (Stumpf 27).

A consultant in recent superintendent searches listed the skills, attributes and competencies people say they want in today's superintendent. As a leader the superintendent must be a communicator, decision maker, delegator and facilitator. As a role model the superintendent must demonstrate approachability, charisma, courage, pride in people, flexibility, integrity, sensitivity and vision. The superintendent must master board relations, community relations, staff relations, evaluation and supervision, finances and teaching/learning (Langlois 24-25). The traditional role of the superintendent appears to have changed substantially in the past 25 years, and may continue to change. It was the researcher's purpose to explain how the changes in educational reform have affected the role of the local superintendent as well as the organizational structure of local public schools.

An Overview of Role Theory

In order to describe the role of the superintendent and explain the changes that role may be undergoing, several terms must be defined briefly. The first is **role,** described as "the total of expectations held by members of a social system for an individual within that

system" (Boles 426). From the concept of **role** researchers have developed a detailed field of **role theory** for use in the analysis of organizations. Most of the variants and nuances are beyond the scope of this study but a few others are germane. **Role expectations** are "the prescriptions and proscriptions held by members of a role set ... in the aggregate they help to define [an individual's] role" (Katz 175).

Many roles are not an exact fit with the environment in which they operate or with the personal characteristics of the individual who tries to perform that role. This produces **role conflict,** "...the simultaneous occurrence of two (or more) role sendings such that compliance with one would make more difficult compliance with the other" (Katz 184). **Role ambiguity** results when "...there is some uncertainty in the minds, either of the focal person or of the members of his role set, as to precisely what his role is at any given time" (Handy 56). A final definition is **role overload** which "...occurs when the expectations and demands of the job exceed the ability of the role occupant to respond" (Mitchell 235). A more detailed discussion of role theory is found in the review of literature chapter of this study.

How might the elements of traditional role theory apply specifically to the circumstances facing a current local superintendent in Michigan? If, as the research demonstrates, the state-level educational bureaucracy and the local site-based environment demand more and different behaviors from the superintendent, then the expectations held by members of the role set may have changed. If there is uncertainty in the minds of the Board, the employees, the community - or of the superintendents - about precisely what

the role entails from year to year, there may be role ambiguity. If superintendents who were competent in the role before the demands of the reform effort, now feel overwhelmed and incapable, it may indicate role overload. And, if superintendents experience confusion about who they really work for, frustration over implementing reform measures, and difficulty in bridging the gap between the social/political/educational agenda of the local community and that of the state, they may experience role conflict.

Ten years ago, when the reform effort was less evolved than now, Professor Arthur Blumberg studied perceived changes in the role of local superintendents. This study further investigated this role change in light of an additional ten years of the educational reform movement in the State of Michigan.

In 1983, Blumberg interviewed public school superintendents in New York State. In that study, he concluded that "the essential meaning of the superintendency as a type of work and the meaning of that work for the superintendent as a person could not be grasped unless the role could be viewed through a lens that focused on its unavoidable conflictual nature."

Blumberg determined that the major sources of conflict in the role are created by the relationships between the superintendent and the school board, the unions, parents, and the local community. Blumberg also found that the politics of educational decision-making and leadership operate in an environment of conflict between the demands of the local educational agenda and the increasing control over local schools exercised by state and federal officials with their own educational agendas. Blumberg also cited five changes

in the social setting in which the superintendent must now function: 1) the change from the traditional concept of school as a place of instruction to one where it is also a focal agent of social policy mandated by courts and legislatures; 2) the recognition of unionism and its effects; 3) the growth of media technology such as computers and closed-circuit television; 4) the demand for more rational decision-making based on hard data; and, 5) the demand for the schools to collaborate with local, state, and federal agencies to a degree not experienced previously.

Theme

The recurring theme that perpetuates itself throughout the study and is substantiated by the data, is the prevalence of legislation that fosters involvement in management decisions or a participatory management style. In reality the legislation that was promoting involvement was creating bureaucracy. In actuality the new legislative reform efforts increase organizational complexity, time, money, and people power. The legislation is negating its own purpose of site-based decision-making and local autonomy of school districts, and it is promoting more complex state-level bureaucracy.

The data supported by the responses of the local superintendents indicate that all the mandates, legislation, regulations, and opinions of the attorney general which were written to increase the quality of Michigan educational standards, are falling short of their intentions. The responses of the superintendents strongly indicate that after four years of Public Act 25, there has been little impact on the quality of educational reform. It was

possible that at the time of the study, the legislation had not been in place long enough to impact the educational system. Another hypothesis concerned the natural process of diffusing state legislation by the local superintendent. It had been a normal practice of superintendents to protect and to circumvent legislation by handling the implementation of the legislation themselves or dispersing parts of the legislation to many subordinates.

The reality of the new reform efforts is that there are time infringements on an already demanding set of role responsibilities. They also create the demand of not only interpreting what they mean, but also implementing them without the extra time and human resources which are necessary to follow through in the manner in which they were intended. The effect is a disconnection from what the intention of the legislation was promoting; and instead of becoming more independent of the state, local school districts are becoming more dependent upon carrying out the state's agenda. Instead of being an agenda which is impacting the quality of educational reform that will affect student achievement, it becomes an agenda that penalizes districts which do not meet their legislative regulations; regulations that are not supported with additional funds to fulfill the state requirements.

Purpose of the Study

The researcher's purpose in this study was to determine the effect of State reform efforts on the local superintendent and the organizational structure of local public schools. The researcher described the State reform efforts and postulated that by assessing the

impact of specific State reform efforts that were not in place twenty-five years ago, the role of the local Superintendent and the structural organization of public schools has changed.

In-depth "insider participant" interviews conducted by a veteran local Michigan superintendent were used to identify to what degree specific reform efforts have had an effect on the role of the local superintendent and the organizational structure of local public schools. A theoretically-based framework for the interviews supports the logic for the exploratory questions and the items of analysis.

Exploratory Question and Hypotheses

The purpose of this study was to determine the effect of state reform efforts on the role of the local superintendent and the organizational structure of local public schools. More specifically the research addressed the following questions:

1. What is the effect of the State reform efforts on the role responsibilities of the local Superintendent in the area of communications?

2. What is the effect of the State reform efforts on the role responsibilities of the local Superintendent in the area of finance?

3. What is the effect of the State reform efforts on the role responsibilities of the local Superintendent in the area of personnel?

4. What is the effect of the State reform efforts on the role responsibilities of the local Superintendent in the area of administration?

5. What is the effect of the State reform efforts on the role responsibilities of the local Superintendent in the area of curriculum?

6. What is the effect of the State reform efforts on hierarchy of authority in the structure of the local public schools?

7. What is the effect of the State reform efforts on the division of labor and specialization in the structure of local public schools?

8. What is the effect of the State reform efforts on the rules and regulations in the structure of the local public schools?

9. What is the effect of the state reform efforts on the desired qualifications of employees in the structure of the local public schools?

10. What is the effect of the State reform efforts on the efficiency of the structural organization of the public schools?

Assumptions and Limitations of the Study

Major assumptions and limitations of this study may be summarized in the following statements:

1. The background research data were limited. The set of events that made up the reform movements was told though the institutional memory of the past four State Superintendents.

2. The methodological technique of interviewing only 27 of 525 Michigan superintendents had limitations; interpretation of questions, artificial responses, and biased answers.

3. Questions. The responses from superintendents focused on perhaps 20 of the 208 State reforms which were selected as the most significant to the respondents. The bias of the focus on those reforms may have influenced the responses.

Definitions of the Terms Used in the Study

1. Role: The total of expectations held by members of a social system for an individual within that system.

2. Role expectations: The prescriptions and proscriptions held by members of a role set...they help to define the individual's role.

3. Role conflict: The simultaneous occurrence of two or more role sendings such that compliance with one would make more difficult compliance with the other.

4. Role ambiguity: Results when there is some uncertainty in the minds, either of the focal person or of the members of his role set, as to precisely what his role is at any given time.

5. Role overload: That which occurs when the expectations and demands of the job exceed the ability of the role occupant to respond.

Organization of the Dissertation

An introduction to the dissertation is provided in Chapter One. Chapter Two contains the background research unique to this study. Chapter Three is a discussion of the methodological procedures. Results of the study are presented in Chapter Four. A discussion of the research findings in correlation to the background research are presented with conclusions and suggestions for further studies in Chapter Five.

Chapter Two

The researcher's purpose in this study was to determine the effect of the State reform efforts on the role of the local superintendent and the organizational structure of local public schools.

Included in the second chapter are an introduction to the twenty-five years of State reform efforts and the extensive background research on the reforms as told through the memory of the past four State Superintendents. The chapter concludes with an overview of the role of local superintendent and the organizational structure of local public schools in an era of State reform efforts.

Introduction-Reform Efforts

Reform efforts have created a realignment in the organization and operation of public schools. The argument is that State reform efforts have had an impact on the role of the public school superintendent and the organizational structure of local public schools. The research for this study indicated an activist and progressive State Department of Education that has made it its business to right inefficiencies, injustices, and inequities whenever it felt necessary. These effects have been initiated through laws, mandates, Attorney General Opinions, and State Board of Education Documents. The study was designed to describe and explain the impact of these efforts on local superintendents and their districts.

To better understand the rationale behind actions taken by the Michigan Department of Education between 1969 and 1994 and to provide background for this study, the researcher interviewed the four state superintendents in the order in which they served; Dr. John Porter (1969-70); Dr. Phillip E. Runkel (1980-87); Mr. Donald L. Bemis (1988-91); and Dr. Robert E. Schiller (1992-1995). The researcher then discussed the background by describing the Superintendents' view of events.

Dr. John Porter 1969-79

The state superintendents described their actions as being motivated by dissatisfaction with conditions in local schools, and they described a few of the steps that may be seen as discrete but which have the cumulative effect of shifting control from the local district to the state. This shift in control begins with Dr. John Porter, State Superintendent of Michigan from 1969-1979. The forefather of the educational reform plan for Michigan, Dr. Porter believed then, as now, that "philosophically there are school districts that don't have the desirable conditions to succeed "... "philosophically those districts are surviving" (Porter). Dr. Porter began in 1969 to bring both financial and educational reform to Michigan schools in an effort to give schools a means of identifying, directing, enforcing, and evaluating a quality educational program.

> ...eighty percent of the kids in a successful district must be able to know and do what you as principals, teachers and superintendents think is reasonable. Ninety percent of the school systems do not have a mechanism for reporting what is reasonable. So, you ask me why we started all this? That's the answer. (Porter)

Porter's approach to school reform was guided by a philosophy demarcated by the "Six-Step Accountability Model" set down in 1968. As Porter states, "We said in the six-step accountability model 'we've got to have goals, we've got to have objectives, we've got to have needs assessment, we've got to have a delivery system ... and then we've got to have evaluation. And you've got to report to the public on how well you're doing'" (Porter). Porter's vision of State versus local control of the schools centered around the transition between the objectives and the delivery system: "All we think is that kids ought to be able to read, compute, and know science when they finish the school system," Porter says. "And here's a reasonable way to assess it. We don't give a damn how you provide the instruction. That's your responsibility. That's what local control is" (Porter).

The first of the six step accountability initiatives leading toward school reform was the Michigan Education Assessment Program. M.E.A.P. was passed into law in 1968, and the first testing began in 1969. This was the first attempt at performance-based education (changed from norm-referenced to criterion-referenced in 1971), undertaken not as a means of comparing districts but of assessing them, (as explained above by Dr. Porter). The implied idea behind M.E.A.P. was that once the assessment was complete, the delivery system could be changed to better facilitate student learning. The whole purpose, according to Porter, "was to try to get schools to face up to the fact that they were not educating all the children" (Porter). State policy-makers felt that, without a push, local districts were not going to solve the education problems. All programs, laws, and reform elements since 1969 have been related in one way or another to M.E.A.P. and the

continuation of performance-based education.

The 1970's began with the development of "The Common Goals of Michigan Education," issued in September 1971. An advisory task force presented the State Board of Education with tentative goals that the advisory committee believed to be "the common goals of an educational system capable of meeting the growing and changing needs of contemporary society" (Porter, "The Common Goals of Michigan Education", 11). Following public meetings the Board adopted what served as statements of broad directions and general purposes for the Michigan Educational system. The three principal areas covered by the goals were: citizenship and morality, charging that Michigan education must create an educational environment which fosters the development of mature and responsible citizens; democracy and equal opportunity, charging Michigan schools with supporting and advancing the principles of democracy by recognizing the worth of every individual and by respecting each person's right to equal educational opportunity; and finally, student learning, charging the education system with the task of helping students to have a positive attitude toward education in order to reach optimum personal growth and the attainment of a worthwhile and rewarding career. A Council of Elementary and Secondary Educators was also developed to formulate performance objectives and methods/techniques for meeting the broad goals.

The 1970's also saw the beginning of Porter's and (then governor) Milliken's attempts to implement educational reform through constitutional amendments. The amendment concept focused on the idea that while 80% of a school district's students

should meet the district's expectations for graduation, few schools have a system for reporting these expectations. However, all such amendments were defeated.

Porter was more successful on other fronts. He was responsible, for example, for issuing the "Student Rights and Responsibilities" handbook. This was the first time the State dealt with student rights and responsibilities as a part of the educational system. Porter described this booklet as "a major breakthrough which just scared the local superintendents to death. As did all these [reforms]" (Porter).

The most significant educational reform during this time, in Porter's opinion, was the start and completion of school desegregation. For the first time all students were entitled to the same educational opportunities. Other major changes in the educational community came with the Special Education Act, making special education mandatory. It "created havoc for the schools," Porter suggested, and was the State's biggest challenge, besides M.E.A.P., in "kind of [pushing] something down the school districts" (Porter). Two years later the federal government modeled the federal law after Michigan's.

Vocational education was another major piece of reform instituted during Porter's tenure. Vocational or skill centers were established statewide so that most areas had them. Included in this reform movement was P.A. 97 of 1974, the Career Education Act. It divided the state into Career Education Planning districts and mandated the local school districts to develop a comprehensive Career Educational Plan for the 1975-76 school year.

Progressing side by side with Porter's educational reform was financial reform in the form of the Bursley "Equal Yield" Plan of 1972, the Uniform School Accounting and

Reporting Act of 1974, recodification of the Michigan School Code in 1976, the Headlee amendment of 1978, and the new format of the State Aid Act in 1979. Prior to Dr. Porter's initiatives, school funding was relatively uncomplicated - the breakdown of revenue from State and local sources being approximately equal. The State's share was generated from a 4% sales tax and various excise taxes. Local property taxes made up the local share of the revenue with a 15 mill cap which could not be raised except by vote. Inequalities existed due to problematic property tax assessments, urban flight, and growth of suburban areas. Appropriations were based on general aid for membership, and categorical aid for transportation, special education, and underprivileged students.

The Bursley "Equal Yield" Plan for State Aid took effect in 1973 with the intention of making financial support for a child's education no longer dependent on where he or she lived. It promised every district an equal amount of money for its pupils in return for an equal effort in terms of millage, by the taxpayers of that community, up to a total of 30 mills. The Bursley concept remained the foundation of school aid through January 1, 1994, at which time locally-voted property taxes for school operation were reduced under Proposal A. Ultimately the "Equal Yield" Plan failed to achieve its primary objective due to inadequate funding and the presence of out-of-formula districts which received no state aid, but "in terms of equalization, it's the best thing that's been in Michigan for 20 years" (Porter).

The next major legislation which impacted school finance was the 1974 passage of the Uniform School Accounting and Reporting Act. Originally scheduled to take effect in

1974, extensive retraining of district bookkeepers delayed its implementation until the beginning of the 1976-77 school year. The new accounting system assigned an item/function code of up to 24 digits to each revenue and expenditure of the school district. This allowed for rapid data recall, instant comparisons between or within districts, cost analysis, and the like.

The new accounting and reporting system was, according to Dr. Porter, an effort to impose fiscal accountability on Michigan public schools in the same way that other initiatives were designed to impose educational accountability. Prior to this legislation, said Porter, there was no consistency in the financial reporting from local districts, and no way for the State to make comparisons between districts. Abuse and mismanagement of finances "was terrible" according to Dr. Porter. Ultimately Porter believes every school should have its own budget and be capable of producing a monthly finance report.

In 1976, the Michigan School Code was re-written for the first time in 50 years. "A major, major undertaking," it took four years to complete (Porter). The revision was an attempt to "delete obsolete material, clarify ambiguities, eliminate conflicting language, unify certain subject areas, reorder the chapter organization, incorporate miscellaneous statutes with pertinence to local and intermediate school districts only, and update the language and style" (Porter). As a result, the recodification clarified the requirements for districts to prepare annual budgets, prescribed budget forms, defined the budget year, and required the time lines for filing budgets.

In 1978, a ballot initiative limiting increases in tax rates and revenues to local governments was approved in the November general election. Popularly referred to as the "Headlee Amendment," after Richard Headlee who spearheaded the initiative, it amended Article IX, Section 31 of the Michigan Constitution. It effectively limited the annual growth in school revenues to the previous year's revenue, plus the rate of state-wide inflation - irrespective of what the local growth had been. It accomplished this by rolling back the district's millage rate to a figure that would raise only that amount in dollars. The only way a district could collect the revenues produced by its previous millage rate was if the rollback was overridden by a vote of the electorate.

While not of major importance, an early effort was made by the Legislature to cope with what proved to be a five-year-long recession; it changed the starting date of the State budget from July 1 to October 1. This one-time accounting ploy left school budgets and the State's budget out of sync - resulting in having State Aid checks to the schools within a single school budget always based on two years' formulas.

Also in 1979, the Legislature introduced the new format of the annual State Aid Act, which is still in effect. It greatly expanded and clarified the various provisions which affect a district's revenues and expenditures. It also provided a framework for the mandates, incentives, and disincentives which were added in later years.

Aside from the financial reforms, there were several other legislative measures passed during Porter's administration that more-or-less directly affected the way local schools were to be run. While many of these acts do not themselves constitute radical

changes in the educational process, taken together they demonstrate the increased amount of state regulation of local school affairs.

Beginning in 1974: P.A. 89 mandated MDE to develop a curriculum in consumer economics; P.A. 180 and 190 required "barrier-free" designs for school construction and accessibility to the handicapped in all present buildings; P.A. 294 required districts having 20 or more students with limited English-speaking ability to operate full-time bilingual programs; P.A. 299 required the State Board to study, evaluate, and make recommendations for the future regarding programs for gifted and academically talented students; P.A. 353 required MDE to develop a curriculum on the culture of ethnic, religious, and racial minority people and the contributions of women.

P.A. 299 (1957) required immunization of children before entry into school; P.A. 332 prohibited schools from soliciting arrest information from job applicants.

In 1976: P.A. 56 permitted two or more districts totaling at least 12,000 students to establish a vocational-technical program if no area skill center existed; P.A. 143 regulated the licensing and teacher certification of Parent Cooperative Preschools. Two related accountability acts passed in 1976 have been particularly significant in terms of the way superintendents run their schools. P.A. 267, The Open Meetings Act, required all consideration, discussion, and decision-making by a school board (with seven specific exceptions) to take place in full view of the public. This act included detailed requirements for the posting of meetings, keeping and availability of meeting minutes, and the opportunity of public participation. In many districts this meant a radical change from

the traditional conduct of decision-making. P.A. 442, The Freedom of Information Act, opened most records of the school district to prompt, full, and close inspection by the public. Again a only few, personally-identifiable, records were exempt from disclosure.

In 1977: P.A. 90 set procedures for schools to issue work permits to minors and eliminated differences in work conditions and hours for males and females; P.A. 397 allowed employees to know, review and copy what was in their employer's personnel file concerning them; P.A. 469 allocated $726,800 to the MDE for automated data processing services; P.A. 621 amended the Uniform Budgeting and Accounting Act to require uniform procedures for the preparation, adoption and execution of school district budgets.

In 1979: P.A. 57 required the State to continue the same level of financial support to local governments as was in effect at the time the "Headlee Amendment" was adopted; P.A. 101 required the State to pay for any new mandated program which was created or expanded after passage; P.A. 211 required city and township treasurers to remit tax collections to schools within ten business days after the 1st and 15th of each month (to prevent tax authorities from keeping school taxes in order to earn interest profits).

The evidence seen through the 1968-1975 public acts, accountability initiatives (MEAP), and new financial reform efforts were mechanisms used by the State centralized bureaucracy to scrutinize and proposition the local school districts. The outcome of the states' reform efforts initiated the threats that affected the management as well as the role of the local superintendent. It was Dr. Porter's initiatives that greatly influenced the state initiatives and in Porter's mind forced the locals to become more accountable, more

productive, and move toward equity. The sum of the passage of the public acts, financial legislation, and the development of documents that set goals and mapped the future accountability of schools represented the bulk of Dr. Porter's activity as a force in school reform.

Porter was never really satisfied with the amount of progress Michigan education actually achieved. Ultimately, any reform is dependent upon the local districts' ability to carry it out. "If all of these [reforms] are put in place most school district principals and leaders, and the teachers, need major professional development and staff training to do these" (Porter). In an attempt to give educators the support and training he felt they needed, Dr. Porter helped get legislation passed that created professional development centers. Unfortunately the plan failed to go statewide (as was originally intended) and never attracted the attention Porter felt it deserved.

Dr. Philip Runkel 1980-1987

The activist and progressive State Department of Education in the 1980's saw the continuation of reforms. The reforms were aimed at improving Michigan's education system through righting inefficiencies, injustices and inequities under the new leadership of Dr. Phillip Runkel, State Superintendent from 1980 to 1987. The reform initiatives were influenced by the "Nation at Risk" document and by the reform efforts of Dr. Porter. According to Runkel, there was a lot going on with schools during this time.

> Schools were doing a lot of things ... Michigan was certainly into school improvement ideas. So, there was some momentum moving there ... in doing things. These [reforms] were initiatives that might help move things forward. But they were primarily initiatives done by the local schools (and) the intermediate districts. Things that we supported... But basically there was momentum to improve the schools. And it was the principals, primarily, (saying) "if you improve teaching - you improve learning." (Runkel).

Dr. Runkel's first step to improve schools was a twofold revision of "The Common Goals of Michigan Education" that was completed in 1979 and published in 1980. Initially ninety-two organizations participated in reviewing the original 1971 document, followed by a twenty-member task force review. The second edition included a new goal for programs to "enrich the preprimary educational experience." In addition, it reorganized the structure of the document by classifying the "Common Goals" into two goal areas: student learning, "containing goals describing expected student achievement in cognitive, affective, and psychomotor domains"; and system responsibilities, "containing goals which describe characteristics of a quality educational system." The goals presented in this document were intended to be used by all participants in the educational process and were described as "only the purposes or desirable ends of the educational process, not the methods or techniques used for their accomplishments." Local boards were encouraged to utilize the document as a means of developing their own educational goals.

Following the publication "A Nation at Risk" in the early eighties, there was a "great deal of clatter across the country about the condition of American education. Test scores were looked at .. and American schools generally ... were left wanting... and

weren't doing very well" (Runkel). In reaction to this heavy criticism of American education and strong pressure from the Legislature, Runkel and the State Board of Education built upon the basic premises of the "Common Goals" with the development and publication of "A Blueprint for Action" in 1984. The plan was developed to work in cooperation with educators, parents, citizens, students, local school boards, business, industry, and all levels of government at improving education in Michigan so as to emphasize equity as well as excellence.

There were four key principles in developing specific recommendations contained within the document. The first, was to improve learning. The major responsibility of schools being student learning with improved curriculum standards and the existence of cooperative partnerships in learning. The second, was creating a learning environment. This meant the creation of a healthy learning atmosphere which includes attendance policy, school climate, discipline, homework, class size, and time on task. Third, strengthening the profession, including professional staff development to improve teaching skills and strategies. Fourth, delivering educational services. The educational services being driven by local and intermediate school districts, the governor and legislature, and finally the institutions of higher education. "Primarily [Blueprint] was built on recommendations," followed by Board actions and directions, and a list of activities in progress or completed (Runkel). Dr. Runkel said, "It was... generally a fairly innocuous document. But it was, at least, something we could put our hands on, and make some recommendations. And [it] probably paved the way for some of the more stringent mandates that went into effect

later" (Runkel).

"Goals 2000 - Education for a New Century" was an outgrowth and continuation of the State Board's "A Blueprint for Action." Published in 1987, the plan was formulated to assure that children starting kindergarten in 1987 and graduating in 2000 would graduate with the necessary skills to cope with a new century. The document recommends actions for the governor, Legislature, and institutions of higher education to follow to insure Michigan's role as an education leader. The intent of "Goals 2000" was to focus Michigan's education picture onto a number of key goal areas, review what was being done in those areas, and then pinpoint specific goals and areas for the State and schools to follow in monitoring and achieving the goals. The initial goal areas included were student achievement, school quality, professional development, school finance and organization, articulation, higher education, rehabilitation, residential institutions, and the Department of Education. Within each of these broad goal areas the plan provided two groups of specific steps. The purpose of the first step was to establish and measure the desired outcomes the State Board had targeted. The second group was to establish and assign the actions the State Board of Education and the State Department of Education would take to achieve the outcomes.

The year 1987 also saw the publication of another State Board document, the "Michigan K-12 Program Standards of Quality." Connected to the "Common Goals" and other policies of the Department of Education, "Program Standards" were designed to enable local school districts to self-assess programs and estimate a level of quality and

need for improvement. The first section of the document provided an outline for school improvement based on the criteria set forth in "School Effectiveness: Eight Variables That Make a Difference." District, building, and classroom level standards, specific time allocations, and high school graduation requirements were also set forth. Part III was comprised of standards for specific curricular areas and educational programming for thinking skills. Media programs and guidance and counseling programs were also outlined for improvement, along with such special areas of programming as juvenile rehabilitation, bilingual education, early childhood education, gifted and talented programs, migrant education, and special education.

Dr. Runkel's tenure as State Superintendent also saw some radical changes in the way schools were financed. The first was P.A. 40 of 1981. A seeming financial windfall for schools, it required net revenues from the Michigan Lottery to be deposited in the State School Aid Fund. Unfortunately, the State diverted as much or more General Fund money away from the School Aid Fund to other State projects at this time, resulting in the School Fund staying essentially unchanged.

Passed in the fourth year of the recession, the Truth-in-Taxation Act, P.A. 5 of 1982, prohibited districts from receiving any more funding than the previous year without going through a public hearing process that stretched over a two week period. Failure to go through the required process effectively rolled back a district's millage rate, past the point of the Headlee Amendment's inflation cap, to freeze the district's revenue at the same dollar figure as the previous year. Another result of the 1982 recession, P.A. 155 of

1982 temporarily increased the State Income Tax to combat the financial losses incurred by the State. Dr. Runkel was instrumental in getting the increase passed and considers it one of the successes of his time as State Superintendent. He feels the (later) rollback of the income tax was "the worst thing that's happened in Michigan in the last decade" and resulted in many of the problems faced by schools today (Runkel).

A major shift in education finance came with the passage of P.A. 110 of 1985. This established the first financial incentives for local districts to adopt certain education reforms. The $28 per pupil incentive was paid if high school students either were offered six 50-minute classes each day or met certain graduation requirements recommended by the State. Eight dollars and thirty-five cents was paid if the pupil/teacher ratio in grades K-3 did not exceed 25:1. If all the incentives were met, a district would receive the same state aid as the previous year plus a small customary inflationary increase found in the per-mill allowance. Meeting the incentive requirements became a necessity for most districts unless they were prepared to operate on less money than the previous year.

In addition to the above mentioned financial reforms, several educational reforms were also passed during Dr. Runkel's term as State Superintendent. While none appear to be as far reaching as the earlier reform measures introduced during Dr. Porter's tenure, many continued the work he started. In addition, the continued trend toward State involvement and control at the local level can be seen in the increasing requirements, mandates, and incentives. Also, one confounding factor to educational reform at this time was the involvement of the Legislature in dealing with the recession that struck Michigan

in 1979.

In 1980: P.A. 109 allowed for the provision of an alternative program for expectant school-age parents, school-age parents, and their young children by a local or intermediate school district; P.A. 285 allowed school boards to use designated immunization requirements as a condition for admission of students.

In 1981 the Legislature passed P.A. 36 requiring that students must attend the public school in which their parent or guardian resides, with one exception: permitting a move to another district if necessary to provide the student a "better home." In fact this act only further enforced Attorney General opinion #5574 of 1979 which was written in an attempt to stop the recession-induced practice of students changing districts to secure an educational advantage that had been curtailed or eliminated in their home district due to the recession. Such changing of districts upset the general economic balance which should exist in any district between the number of students which must be educated from that community and the tax base available to support that education. Five other acts in 1981 were also a result of the recession: P.A. 78 temporarily excused ten financially troubled districts from the requirements of the Uniform Budgeting and Accounting Act; P.A. 87 amended the School Code to permit districts to implement cost cutting measures in transportation, special and vocational education, school lunch programs, etc. and permitted schools to levy and collect one-half of their annual taxes during the summer to reduce the interest they pay to borrow money between tax collections; and P.A.'s 127, 128, and 140: permitted school districts to hold additional millage elections more often,

and with fewer restrictions, until well into December. In addition, P.A. 105 required schools to screen students for scoliosis at about the sixth grade level.

In 1982: P.A. 136 permitted five more deficit districts to continue receiving State Aid; P.A. 422 provided a formula for determining the number of students eligible for compensatory education based on the fourth and seventh grade M.E.A.P. scores.

In 1983 most branches of the State government were preoccupied with the recession and no legislation was passed which was directly related to the reform initiatives of Drs. Porter and Runkel. The dire financial circumstances of most schools were, however, addressed by several public acts: P.A. 15 increased the State Income Tax by 1.75%, to 6.1%; P.A. 16 allowed schools to borrow beyond previous limits; P.A. 124 provided State loans to school districts; P.A. 147 permitted local boards to sell school land on land contracts; P.A. 174 permitted county loans to school districts; etc..

In 1984: P.A. 202 amended the Open Meetings Act to permit a periodic personnel evaluation to be held in private if requested; P.A. 229 fulfilled the calculation required by P.A. 57 of 1979 by determining that State spending on local governments, including schools, shall not be less than 41.61% of total State spending; P.A. 239 increased the appropriation for local and ISD professional staff development to $2.7 million; P.A. 389 established the third Monday in January as Martin Luther King, Jr. Day, but only as a commemorative day for public schools and not a legal school holiday.

In 1985: P.A. 5 permitted nŏn-contiguous districts to establish vocational-technical programs if a district in the middle refused to join; and P.A. 91 amended the

Public School Employee Retirement Act to permit employees to retire with full benefits if they qualified for the "rule of 80" - when their age plus years of service equaled 80 or more. This was touted as a school reform measure, as it helped solve the problem created by the continued presence of thousands of veteran teachers who either could not, or would not, adapt to more modern teaching methods.

In 1986: P.A. 55 prohibited a district from transporting on a school bus more than 110% of the rated seating capacity of that bus, a number often exceeded during the recession years; P.A. 80 required schools to inform their employees of hazardous chemicals in the workplace; and P.A. 147 required the containment or removal of asbestos from schools and provided for the training of school maintenance workers to accomplish this.

Three other public acts had a more profound impact on school improvement. P.A. 72 of 1990 required districts to offer permanent jobs for the following year to substitute teachers who had worked at least 120 days. This can be seen as the antithesis of school improvement, as it conferred jobs on people who bypassed the normal screening and interview process by virtue of living locally - not necessarily being the top candidates. P.A. 163 established the certification process for school administrators. After the initial certificate, an administrator must complete six semester hours or 18 State Board certified continuing education units (CEU's) each five years to continue certification. Public Act 267 required new teachers, beginning in 1991, to pass both basic skills and subject matter tests to earn a teaching certificate. A companion measure to require current teachers to

undergo periodic recertification like administrators, was defeated by the Michigan Education Association.

In 1987: P.A. 18 granted high school foreign language credit to pupils who passed a course in American sign language; P.A. 56 permitted districts to hire non-certified vocational educational teachers even if a certified teacher was available; P.A. 84 required certain information for enrolling new and transfer students and the tagging of records of children reported missing; P.A. 124 provided incentives for low-income Michigan residents to graduate from high school in the form of a voucher for two years' tuition at a community college; P.A. 128 required Michigan districts to file annual reports stating that they were not using cars or chauffeurs for Board Members - this was in reaction to the Detroit Board of Education practice at the time; and P.A. 211 directed superintendents to report the finding of a dangerous weapon in the possession of a student immediately to the police and the student's parent or guardian. Lastly there was the passage of P.A. 185 which added AIDS to the list of dangerous communicable diseases which were mandated to be taught to students.

Attorney General Opinions

Passage of Public Act 185 was merely the continuation of an ongoing tug-of-war between Michigan's Legislature and another occasional player on the education scene, Michigan's Attorney General. Beginning with the first appearance of AIDS in the United States in 1979, the Department of Education accelerated its efforts to develop a

comprehensive sex education curriculum for use in public schools. The Attorney General, however, tried rather conspicuously to block or delay this effort. On April 21, 1981, the Attorney General ruled that "a Board of Education may not include sex education instruction in any class or course which students are required to take" (Opinion #5881). The Legislature responded with P.A. 87, taking effect July 2, 1981, to "permit the teaching of sex education as part of a course required for graduation," specifically superseding AG Opinion #5881. With the continued spread of AIDS and the HIV virus to the teenage population, the Legislature sought to insure that all Michigan public school students received this potentially lifesaving instruction with the passage of P.A. 185 of 1987. The addition of AIDS to the list of communicable diseases circumvented open combat with those opposed to sex and AIDS education, because the cause and cure of communicable diseases has been taught in Michigan schools since 1895. P.A. 185 "required public schools to teach the principal modes by which AIDS is spread and the best methods of preventing such diseases." Although the intention seems clear, the Attorney General continued to disagree by issuing Opinion #6521 of 1988. He ruled that the Legislature "did not intend to require school districts to provide sex education instruction... [and] while school districts must offer instruction concerning AIDS, the law does not require students to take AIDS instruction" (Opinion #6521). The result of all this political waggling was that school districts found themselves in a complex legal mess surrounding the issue of sex education. The Attorney General said that school districts can't require sex education but the Legislature say students must receive it to graduate.

The Legislature said students must be taught how AIDS is contracted and prevented, and required Boards to adopt it into their curricula. But the AG ruled the lawmakers didn't mean it and students aren't required to learn about AIDS.

Another Attorney General ruling also confounded school improvement efforts and the teaching process. One of the steps outlined by Dr. Porter in his six-step process for addressing school reform was the identification of specific needs and the tailoring of a delivery system to address those needs. In most school districts the first significant awareness of needs appears in kindergarten. One of the common delivery systems which schools have developed to achieve this objective is the developmental kindergarten program. This program employs extensive early screening and testing procedures to identify those skills which each child lacks, and permits teachers and paraprofessionals to concentrate time and resources on those deficiencies without slowing down the other members of the class who are ready for advanced activities. However in 1987 the Attorney General nevertheless ruled that children have the right to enter regular Kindergarten "even if school personnel recommend enrollment in an 'Early 5' or 'Developmental Kindergarten' program" (Opinion #6467). This presented educators with a "Catch 22" situation - in trying to comply with one bureaucracy they were likely to violate the rulings of another.

According to Dr. Runkel there was a move during his tenure as State Superintendent "from starting off trying to assist - at least we did, at this level - to where people started moving into mandating more programs" (Runkel). This trend continued on

into the next decade.

Dr. Runkel's period of superintendency was marked by a tremendous number of state mandates that altered the daily business of running schools. The state mandates were driven by the "Nation at Risk" and Michigan's "A Blueprint for Action," "Goals 2000" and "Michigan K-12 Program Standards of Quality." Through the influence of these documents evidence was clear that the impact the national and state efforts had on promoting productivity and accountability in the local schools was making its mark. The focus on mandating locals to meet educational requirements was also driving state level incentives. The states' efforts impacted the role of the local superintendent as he or she ran the daily operations and set goals and student outcomes for the district's future. The researcher's purpose in this study was to describe and explain how the impact of the activist and progressive State Department of Education reform efforts in public education affected the role of the local superintendent and the organizational structure of the local public schools. The reform efforts continued into the term of the next State Superintendent, Donald Bemis.

Donald Bemis 1988-1991

When Dr. Runkel left the office of State Superintendent, the vacancy was filled by Donald Bemis, who served from 1988 to 1991. Mr. Bemis took the position with the benefit of eighteen years' experience as a local superintendent in Utica Community Schools. The root of the problems facing public education, according to Bemis, is that

"we have never said in the history of this country, and to this day we still haven't said, what we expect of public schools" (Bemis). Bemis felt that local districts in Michigan exercise a great deal of control over educational procedures, compared with other states; he also felt that local districts have a long way to go before their performance reaches satisfactory levels.

Mr. Bemis's stint as superintendent, while relatively brief, was rather eventful in terms of policy-making measures aimed at enhancing school reform. As during the tenures of Porter and Runkel, in the Bemis years several specific changes were mandated in the daily operations of schools through the passage of a series of public acts.

In 1988: P.A. 146 required lead free plumbing in the construction and repair of school buildings; P.A. 215 prohibited pupils from carrying pocket pagers or other electronic devices in schools; P.A. 477 prohibited payment to students for participation in intercollegiate athletics, or for encouraging high school students to attend a college in order to participate in sports; P.A. 488 guaranteed confidentiality of records for students with communicable diseases; P.A. 521 prohibited corporal punishment, defined as "the deliberate infliction of physical pain by any means upon the whole or any part of a pupil's body as a penalty or punishment for the pupil's offense," in any form (the law was later modified - see P.A. 6 of 1992, during Schiller's administration); P.A. 232 provided a process for appealing a grade to a five-member committee which included three teachers, whose decision could, in turn, be appealed by a teacher but not by a parent or student (this process superseded the previous authority of the superintendent to change a grade in

question); P.A. 318 required schools to calculate a dropout rate for grades 7-12, administer an employability skills test to students, and adopt adult education graduation requirements similar to regular high school requirements; P.A. 478 required the clean-up of leaking underground storage tanks; P.A. 503 permitted teachers to nullify a previously-earned subject area certification, in order to protect them from having to teach courses in which they had been certified, but had not taught for several years.

In 1989: P.A. 32 authorized a school district to cooperate with law enforcement agencies to sponsor a McGruff (take-a-bite-out-of-crime) child watch program; P.A. 159 required each district to prepare an annual report and distribute it to the public (since this bill was tie-barred to P.A. 25 of 1990, it did not go into effect until the following year); P.A. 171 promised thousands of new computers for Michigan classrooms, paid for by the State over a five-year period; after paying for the first year, the State defaulted, and districts made up the remaining payments; P.A. 193 encouraged retirement of veteran teachers and staff members by establishing a retirement program through which 90% of a retiree's health care, including dental and optical, would be paid for by the State; P.A. 194 likewise encouraged retirement by introducing the Member Improvement Plan to enhance pensions by an additional 3% each year.

In 1990: P.A. 30 prohibited the use, possession or distribution of androgenic anabolic steroids (which were suspected to be a problem in several schools' athletic programs); P.A. 62 required the State Board to develop guidelines for the teaching of dispute resolution, for addition to the curriculum of public schools; P.A. 72 permitted the

State to review, manage, and plan the operations of a school district in financial chaos, and in extreme cases it authorized the appointment of an Emergency Fiscal Manager with total control over the fiscal matters of the district until the emergency has passed; P.A. 139 added the HIV virus to AIDS as a subject for mandatory instruction in the public schools; P.A. 211 permitted minors to petition a Probate Court for permission to get an abortion without their parent's consent or knowledge, and required public schools to give each pupil in grades 6-12 written notification of this right. P.A. 25 was also passed in 1990, and will be discussed below.

While these public acts dealt with mandated changes in the running of the schools, Bemis insists:

> there are very few mandates in the State of Michigan. It's really the carrot-and-stick approach - as opposed to just the stick... By mandates, I mean things the schools absolutely have to do. Now if you consider a mandate something [that] if you don't do it, you don't get your money, that's something different. (Bemis)

Bemis also stated that school reforms in Michigan are regulated by the process of "potential reward," meaning that compliance with recommended changes by local districts results in those districts' receiving funding incentives from the State. Many of the "potential reward" regulated reforms Bemis alluded to are covered not by public acts, but by a series of documents published during his tenure that attempt to "say what we expect of public schools," to quote Bemis's previously noted assessment of what public education needs most, by setting down long- and short-range goals as well as strategies for reaching them, with financial motivation for following the recommendations. Among the relevant

documents that need to be discussed are the "Goals 2000: Deliver the Dream" document from 1988; the "Condition of Michigan Education" report of 1989; the 1990-issued "Better Education for Michigan Citizens," a final status report on 1984's "Blueprint for Action"; President Bush's "America 2000: An Education Strategy" issued in 1990; and two responses to that document - "21st Century Education: Where the Next Century Begins" and "Michigan 2000: Achieving Excellence in Education."

"Goals 2000: Deliver the Dream" continued the process started by the "Goals 2000" document of 1987, by further establishing a number of selected areas for continued improvement over a two year period. These goals had a significant impact on educational reform due to the legislative regulations and mandates that were introduced in the legislature in response to this publication.

Proposed actions in the area of elementary and secondary programs included the development of and financial incentives for implementation of a core curriculum; incentive funding for the development of a school improvement plan and operation of compensatory education in conjunction with school improvement plans; increased funding for preschool programs and a model policy for entry into kindergarten; the development, assessment, and funding of a model employability skills curriculum; the adoption of the State Board's policy on communicable disease control; and the availability of technology grants and instructional television grants to schools.

Proposed actions were also made in the area of elementary and secondary school finance, governance, and evaluation. These included recommendations for reduced

categoricals in the State School Aid Act for wealthy districts and an incentive program to reduce dropout rates and promote student achievement; funding, training and recognition for the Michigan Accreditation Program; early warning and help for financially deficit and educationally troubled districts; incentive funding for planning and implementing family option schools; and funding and educational support for rural districts and urban education.

"Goals 2000: Deliver the Dream" made recommendations in the areas of higher education and rehabilitation while also providing background information and a list of accomplishments already made in the four major areas.

The "Condition of Michigan Education" report of 1989 provided a graphic collection of statistical data covering the time from 1970 to 1989. It reflected apparent educational trends taking place in Michigan in the areas of students, outcomes, staff, finance, and organization and management. The status of earlier reforms, in particular those recommendations included in "A Blueprint for Action," were reflected in this report, thus providing an indication of the effectiveness of legislative intervention on behalf of the reform measures over the years. For example, the report indicated rises in the number of special education and adult education students, student ACT and SAT scores, teacher salaries, total per pupil expenditures, etc., while indicating decreases in the number of vocational education students, the number of public schools and districts, and other areas.

The "Better Education for Michigan Citizens: A Blueprint for Action: Third Annual Status Report" document was a final report on the "Blueprint for Action"

document of 1984. It identified the progress made on each of the recommendations contained in the "Blueprint" by rating each as completed, progressing toward completion, or not progressing toward completion. Also included were recommendations to the local and intermediate school districts, governor, legislature, and universities and colleges, as well as funding infringements and incentives aimed at enforcing recommendation policies.

"America Goals 2000: An Education Strategy" was a national strategy for educational reform, presented by President George Bush, that hoped to "spur far-reaching changes in weary practices, outmoded assumptions, and long-assumed constraints on education." The ten year plan was based on the following six goals: every child will start school ready to learn; the high school graduation rate will increase to at least 90%; students leaving grades 4, 8, and 12 will have demonstrated competency in English, mathematics, science, history, and geography, and be prepared for citizenship, further learning, and employment; U.S. students will be the first in the world in math and science achievements; every adult will be literate and possess the knowledge and skills necessary to compete in a global economy and exercise the rights and responsibilities of citizenship; and finally, all schools will be free of drugs and violence.

The four part strategy used to simultaneously pursue the goals included: improvement of today's schools and increased accountability for the results; the invention of new schools to meet the demands of a new century; the continued learning by those already out of school and in the work force; and the commitment of communities and

families to learning.

"America 2000" honored local control while setting national goals by acknowledging the limited role the federal government could play. It could help by setting standards, highlighting examples, contributing funds, and providing flexibility in exchange for accountability, but ultimately it relied on local initiative and the role of localities and states as senior partners in paying for education.

Upon adoption of President Bush's National Education Goals in February 1990, Michigan's State Board of Education was the first to affirm these goals. They also recognized that to obtain long range goals there was a need for short term obtainable goals. The "21st Century Education: Where the Next Century Begins" goals established the priorities the Board set for 1990-2000: Outcome-based educational programs; adequate and equitable funding for education of all students, including an equal basic revenue for equal tax efforts; development of a strong equity program to acknowledge and promote recognition of Michigan's diverse population; adoption of a statewide handicapper civil rights plan; promotion of interdistrict public schools of choice as a catalyst for restructuring; increasing the high school graduation rate to at least 90% by the year 2000; adoption of a statewide 5-year plan to coordinate technology investments in education; development of a statewide plan to reform science and mathematics education; the addressing of quality and excellence in post-secondary programs and courses; the meeting by all college and university programs of the State Board of Education "Standards of Quality" for teacher and administrator preparation; development and promotion of

strategies to make the transition from school to the work place easier; advocating collaboration between and within agencies to capitalize on available resources; and direction by the State Board of Education of a reorganization of the Department of Education.

"Michigan 2000: Achieving Excellence in Education" was a special message to the Legislature from Governor Engler. The goals in the "Michigan 2000" proposal were intended to catalyze change and were focused on Bush's "America 2000" goals. Fundamental changes cited in this document included: core curriculum development for each district based on desired measurable outcomes; initiatives for young children at risk, including tutoring service, and extended days for kindergarten; support for quality education through school improvement mechanisms such as site-based decision making, professional staff development, school-based bonuses, and teacher recruitment, aimed at enhancing local autonomy; promoting accountability in meeting State requirements through school accreditation; the development of a smooth and functional system for moving young people from school to the work place; the need for telecommunications systems for sharing instructional programs; the support for family's choice of schools within a school district thereby providing specialization and competition within a district; and the redesigning of the school year from 180 to 200 days.

While the above list of documents clearly demonstrates that the State of Michigan is moving toward establishing a set of objectives for the local schools to strive for, Bemis could not stress enough the importance of doing even more in that area. "Now if I were

king," he claims, " I would do a great deal more as far as setting goals - than is even in place right now. I'm not saying I would necessarily tell you how to do it. But I would do it through a reward system, much like you see implemented there" (Bemis).

The piece of legislation that is seemingly most significant to Bemis's tenure, and indeed most significant in the recent history of Michigan public education, is Public Act 25 of 1990, the culmination of Bemis's "Quality Plan." Interestingly, each of the previous superintendents viewed P.A. 25 as a solidification of reforms that he began to develop; Porter sees P.A. 25 as a continuation of M.E.A.P. and of the "Six Step Accountability Model," while Runkel tends to see it as a more vehement, and perhaps even overzealous, restatement of the "Blueprint for Action." Bemis himself indicated his belief that while it still falls short of what is needed, P.A. 25 is the most significant step taken by the State of Michigan so far toward education reform . "In Michigan we've never had a statewide agenda," he says. "We are the closest to it with the advent of Public Act 25. And I obviously - since it happened on my watch - I think it's really pretty important. And very appropriate" (Bemis).

While Public Act 25 has factors in common with the "Blueprint for Action," it incorporated several new aspects, including student outcomes and more stringently applied financial incentives, that are predicted to make it a more effective step towards improved public education. Bemis suggests there was a need to:

> ...turn up the heat - because there wasn't much going on with ["Blueprint"] ... Recommendations that really were kind of not enforceable. There wasn't money connected with it, as I recall. I mean, I find...school districts

> won't do anything unless you put dollars - I was under the naive impression that many school superintendents would do good things because it was good for children. Well, that's not necessarily the case. (Bemis)

Therefore Public Act 25 was instituted. This act forced each school, through funding incentives, to do the following: each district and each school had to establish a continuous school improvement process, complete with a mission statement, 3-5 year goals, and building-level decision-making; each district had to develop a core curriculum, with curriculum objectives based on student outcomes testable through the new (tougher) M.E.A.P. tests and eventually a high school exit exam; each school must begin the process of becoming accredited according to State criteria; each school had to meet Statewide standards of quality and uniform exit standards for graduates, enforceable through the institution of State-endorsed diplomas and standardized student portfolios; each district and building had to prepare and make public an annual report; and districts were permitted to employ non-certified teachers in several science, math, and technology areas in grades 9-12. The realignment of standards forced schools to redefine their curricula and meet the State mandates in order to prevent the loss of critical funding incentives (the quality incentive of $25/student was added for full compliance with the requirements of P.A. 25) in an era of diminished State financial support of local schools. The financial clout P.A. 25 provided to the State, and the new powers derived thereof, combined to give the State-level educational bureaucracy more control over the operations and mission of local districts than any other piece of legislation in the history of Michigan educational reform.

Some key figures, including ex-State Superintendent Runkel, felt that P.A. 25 finds the State bureaucracy overstepping the bounds of what legislation should mandate to the local schools. Runkel stated:

> If you look at Public Act 25, these are practices which are administrative - that should not be legislative. Who does not want to have some kind of report to the people in their school district? OK? I mean, you might do it in a lot of different ways, but what does that entail? There's a whole series of these things. For example: one of the things I felt schools never did much of was polling. So we provided a service to the districts, at very little cost, to teach them how to poll. We've got hundreds of districts polling now. We didn't mandate; it's not mandated. We provided an example, a good management plan. So some of these things just didn't seem to make a whole lot of sense to me - to be laws. (Runkel)

For all Bemis's disclaimers about how little Michigan mandates, it seems that the schools have little choice but to comply with the regulations of P.A. 25 in order to gather all the financial resources they need to keep running. While Runkel finds the situation problematic, however, Bemis and the majority of other figures involved in the educational agenda seem to feel that this type of financial control is necessary if any progress is to be made with school reform. "Individual places will address the problems," says Bemis. "But not systematically, we won't. Not unless there is some external motivational factor" (Bemis). The State Superintendents argued that, in general, P.A. 25 is the closest Michigan has come to giving the schools the kick they need to become successful.

Yet, Bemis felt that the steps taken by P.A. 25 are successful. He explains:

> I will bet I have read 150 annual reports. And if you read them you'd think there isn't one single problem in American education. As I'm reading them I'm thinking, you know, they didn't have any choice about this. They had to make people feel good about their schools. If not, they wouldn't

> support them. I don't know how you get around it. If you were a very skillful reader, an investigator, you might be able to dig a little kernel of some problem in some school. But for the most part, no way. Even [a negative] will be couched in some way that "it was worse 15 years ago." They'll show that in 1950 dropouts were 35% and now it's only 8%...It's kind of like Congress; you know, everyone hates Congress, but they love their local Congressman. Everyone knows there's a problem with education - but not in my school. I think there are a lot of problems in a lot of schools. (Bemis)

Mr. Bemis' tenure as State Superintendent concluded with strong evidence of social reform, concern for local control of schools and compliance issues being addressed through P.A. 25. Public Act 25 was and continues to be the latest initiative that the activist, progressive State Department of Education has made to correct the inefficiencies, injustices and inequities in public schools. The impact of the initiatives during his tenure strongly impacted the role of the local districts and, in turn, the local superintendents.

Dr. Robert Schiller 1992-1995

The vacancy left by Mr. Bemis was filled by Dr. Robert Schiller in 1992. His appointment came at a time when the Quality Plan was already in progress. In his opinion "much of P.A. 25 is a roll-up of those things which most of the schools ... should have been doing or have been doing over time. Namely the school improvement process." Dr. Schiller believes the aggressive reform agenda that developed around the country over the past ten or fifteen years gave rise to:

> those kind of external initiatives which would push, shove, cajole, drag school districts into doing things somewhat differently. And those particular areas, I think, are pretty much incorporated in what came out of P.A. 25: accreditation,

> endorsed diplomas. There is nothing there that came out of P.A. 25 ... that [is] unique or different from that of what most other states have done at least five years ago. (Schiller)

This rigorous reform agenda was a way in which "the State could move schools to a higher level. Move schooling to a higher level" (Schiller). Dr. Schiller believes reform grew out of three main areas. The first was the desire by Governors to have more direction and control over the large part of the State budget that goes to funding public schools. Also many Governors and Legislators recognized that if they controlled the financing of schools, they also controlled the policies. Lastly, there was the public schools' lack of ability "to demonstrate substantive kinds of improvements that [were] current" (Schiller).

Dr. Schiller tried to make his own mark on P.A. 25 with the State Aid bill, Proposal A. In Schiller's opinion attempts to "coax" school districts to follow recommendations through the use of financial incentives on a per-pupil basis "have really served to be disincentives to school districts," resulting in P.A. 25 serving as a "compliance activity rather than an organic kind of a growth opportunity for school districts." The passage of Proposal A did change "the paradigm by taking away the incentives and rolling up the money into a basic block grant for school districts." Superintendents are given a set amount of funding with very few categorical requirements attached to it and in return are held responsible for accreditation of their schools and their test scores. This changed the original process-oriented, incentive driven approach of P.A. 25 to a more "outcomes-oriented" approach (Schiller).

With the exception of working with Public Act 25, little had been done in Schiller's term as State Superintendent. This is partly due to the fact that this research only extended through 1993 and partly due to the fact that P.A. 25 was the culmination of twenty-some years of educational and financial reform. The few measures passed in 1992 included: P.A. 6 which modified the language of P.A. 521 of 1988 regarding corporal punishment to allow the exercise of minimum force when a threat of physical violence was involved; P.A. 39 which required prosecutors to notify the superintendent of the district which employed anyone bound over for trial on criminal sexual conduct charges; P.A. 99 which required a criminal records check of any newly-hired school employees; P.A. 134 which required a chauffeur's license for anyone who drove pupils to or from school or a school related event; P.A. 297 which repealed P.A. 134 once it became clear that it not only prohibited parents from driving their children to school but also prevented students from driving themselves to school; and P.A. 148, the School Aid Appropriations Act, which offered a $5 per pupil State incentive if the administrative costs of a districts were less than 105% of the average costs of all districts, permitted seniors within five credits of graduation to enroll in college with the district paying $50 per credit, raised daily attendance requirements for State Aid from 70% to 75%, added student portfolios and State Endorsed Diplomas as future requirements, required districts to list the male and female interscholastic teams offered in the past and present years, and lastly canceled State funding for Schools of Choice.

Reform Effects on the Superintendent and the Organizational Structure of the Local Public Schools

In light of all the reform measures and strategies that have been enacted over the past two and a half decades, each of the four superintendents interviewed made several comments on the way the role of local superintendents and the organizational structure of local schools have been affected, the manner in which the State bureaucracy works to affect the educational process, and what the future has in store for the Michigan public education system. The researcher then examined their opinions in order to shed some light on the situation of the status of education in the State, and particularly the present and future situation of the local superintendency.

One interesting trend to note is that each of the interviewees talked about how much autonomy is still left to the local districts. Schiller even goes so far as to say that local superintendents have "as much or greater flexibility and local autonomy than ever before, within a framework of expectations." He suggests that the role of the State has been and continues to be to keep a "delicate balance between its capacity to enact new laws and regulations to move ahead schools and schooling, and to maintain the local incentive, the local flexibility, the local innovation" (Schiller). The source of local flexibility, according to Schiller, is the freedom of the district to determine how the schools will be taught:

> No one's saying "Thou shalt do it this way." You can pick or choose. OK? School districts have an expectation to teach a core curricula of outcomes, and a variety of nine different discipline areas. But the State says all kids should be able

> to do the following kinds of things - but does not say to you that your sequence of math ought to be algebra, geometry, advanced algebra, whatever... Rather, you at the local level determine whether you're going to do it interdisciplinarily, whether you want to do away with courses per se. Make it a skills array. We're not saying that all kids have to progress from one grade to another. Those are local determinations. So I tend to think that the State has put forward an educational reform plan that provides a framework but yet, for 560 school districts and 3600 schools, the opportunity to grow. And the responsibility will be upon the districts or schools of children to demonstrate the growth - and the State to serve in a technical assistance and monitoring capacity. (Schiller)

Porter and Bemis more or less agree with Schiller's assessment of the autonomy of the local district. Porter explains from the State's point-of-view: "You'd set up a set of expectations, consistent with Act 25 if you want to, and then you would say to the school systems "you're responsible for the delivery system. Not the State. That's the distinction. There's no State control of delivery" (Porter). Bemis takes his analysis a bit farther:

> I think there should be a great deal of flexibility, at the local level, on how you do things. My own bias... [is] that the effects of what goes on in local school districts doesn't stay there. An undereducated child in Romeo or Holly will have a tremendous impact on the best educated kid from wherever. So I think that the goals and objectives are very reasonably set on a regional or statewide basis. And then certain minimum objectives for individuals involved. I think that's just incredibly important. (Bemis)

Here Bemis provides some insight into why State-regulated objectives are necessary in conjunction with local control of education. Certain minimum requirements are needed to insure that students from one district do not receive an education that is terribly lacking, which would poorly affect other individuals, even those whose education had been top-notch. However, the local districts are free to decide the route by which those requirements are met.

If any of the superintendents plays devil's advocate to this assessment, it is Runkel. Runkel does not undermine the importance of local control; instead he insists on it, and vehemently recalls that his administration did its best to preserve local autonomy. However, Runkel disagrees with the opinion that local districts still hold a satisfactory level of control over their own affairs. He feels that the State is exerting too much control through legislation and mandates. "The pressures on superintendents are coming from all these forces," he laments. "And they're much greater. And bureaucracy is part of it. It's a force that you didn't use to have. It started with special education, the testing, and then you keep moving through..." (Runkel).

Schiller, in his more optimistic view of the opportunities available to local superintendents, feels that they have a responsibility to become more involved with educational improvement. Says Schiller, "I think the role of the superintendent has to be defined in this way: less management, more leadership. I think the reason why so many initiatives came out of the Legislature is because of a default of leadership by local superintendents" (Schiller). One would assume from Runkel's above remarks that he might take issue with this statement; the local superintendent has no time for leadership because he/she is too busy striving for compliance. Runkel speaks of the need to "empower" the superintendents, by giving them resources and room to move, while the collection of State mandates does exactly the opposite.

Meanwhile, Bemis paints a vivid picture of what he thinks, realistically, a superintendent is capable of doing:

> I went up north one time to the university, and I invited a group of superintendents to come in and talk about some issues. This guy came in with this baseball cap on, and a Mackinaw jacket on, and said please excuse him but he had been repairing the roof. It was raining and it was leaking. And if the roof was going to be repaired, he had to repair it. It was not a complex situation. You know, it's kind of like running a small retail store. For the 560 school superintendents in Michigan, that's what it's like for 500 of them... I mean, you're going to have to climb up and fix the leaky roof. (Bemis)

Bemis claims that the role of the local superintendent is fairly consistent today with what it has been for the past two or three decades. While it is a high stress job, considering the number of details to be considered coming from the State government, he suggests that it has always been a high stress job:

> Whatever you're going through currently always seems the most difficult. But the dynamics that were involved were essentially the same... I don't mean to belittle what's going on currently, not at all, but the forces on a local superintendent are just as great... Now there's more things to think about from the State... But I see that as a plus. Because in some respects.. the State is saying "after you finish fixing the roof, come down and think about the core curriculum".... I'm not sure superintendents have ever been great curriculum leaders... The superintendent's job is to keep the engine running. And hopefully there are some other people there who are coming up with ideas... My job was, pretty much, to implement the best ideas of the staff. That, I think, is the role of a good superintendent. To keep the operation running, to get the resources necessary to make it run, and to implement the best thinking on my staff. (Bemis)

Interestingly, Porter basically agrees once again with Bemis's take on the situation:

> I have not, unfortunately, seen significant change in the role of school superintendents. And I've been one... Basically the job is being done almost identically to the way it was 20 years ago except, I must admit, it's more challenging now than it was 20 years ago... The reason is that the public is more agitated - about taxes. And about things that aren't related to the agenda. Therefore the superintendent is spending more energy on items that divert him or her from what ought to be the school reform

agenda. (Porter)

Comparing the two opinions, one sees from Bemis a more optimistic view, in which the superintendent can receive guidance from the State and from his or her staff in order to contribute to school improvement while still managing to keep the process running. From Porter, on the other hand, can be seen the view that difficulties with finance and other everyday problems involved with keeping the process running provide too much of a distraction for the superintendent to concentrate adequately on reforming the schools.

Just as interesting and relevant a point to consider is where the four most recent State Superintendents have considered their place in driving the education agenda, and each talks about how the major players in the state bureaucracy fit together. Porter offers a unique perspective, since his tenure unfolded during a time when the political situation was farthest removed from the current one. He reminisces:

> Bill Milliken and I are very good friends. And he was very supportive, but not active, except when we wanted him to be. And so he played a sort of statesman-like role. Engler is more active. I mean he's "roll up the sleeves and take over the State Board," or whatever. You know? And therefore there was a high degree of compatibility and comfort between the State Board, the Legislature, and the Governor's office during my ten years... My impression is that since my tenure - the Blanchard years with Bemis were compatible. But since then there has been a lot more friction. (Porter)

Today Porter sees the Governor as the major player pushing the agenda, while the State Board has lost considerable power. This view is consistent with the respective views of each of the other interviewees. Runkel describes an "ongoing tug" between the Governor and the Legislature, concluding that currently "the Governor has pretty much

control of this thing" (Runkel). His explanation for this shift in power is, in part, that Engler is probably the best-informed on education issues of all the Governors in Michigan's recent history. However, he also describes a nationwide trend in which governors are moving in and taking over the struggle concerning educational reform. Dr. Runkel describes the trends causing the Departments of Education and the State Boards to slowly lose their power, influence and effectiveness. In all four interviews the possibility and even probability of the State Board being dissolved in the near future was mentioned. And concerning the Department of Education, perhaps Bemis puts the situation clearest when he says, "The Department has pretty much been decimated under the current administration" (Bemis).

Runkel's view that the Governor has become the most powerful force concerning education reform in the State bureaucracy coincides with his observation that Bemis and Schiller themselves have had little to do with legislative decisions made while they were in office. Runkel suggests that what has been expected of these two latest State Superintendents has been "to do almost anything to please the Governor" (Runkel). This assessment is consistent even with Schiller's assessment of his own position: "My role has been very clearly from the start, by the Governor and the State Board, to take the package and make it work. Implement it, or reshape it where I thought best" (Schiller). While Schiller's perception of his job requirements is less harsh then Runkel's, it demonstrates the shift that has taken place since the tenure of Porter, when the Governor was mostly passive and the Superintendent assumed real power in driving educational reforms.

Next to the Governor, the consensus among all four Superintendents seems to be that the Legislature has come to wield the most power regarding the education agenda. As Schiller puts it, "Lawmakers control the policy agenda because they control where the money's coming from and how much money" (Schiller). Also, Bemis recalled that during his tenure, "the biggest movers probably were the State Legislature" (Bemis). Thus, a very simple statement by Schiller may serve to sum up the bulk of what's happening in the State bureaucracy today to effect education reform: "You have an active Governor, you have an active Legislature" (Schiller).

The question of what the future has in store for both the interactions in the State bureaucracy and the role of the local superintendent has elicited a variety of responses from the interviewees. Schiller predicted improvement. Schiller summed up what had been happening recently by saying, "Every initiative that's been created from the outside that's been put into schools and states, to this time have not had any sustainable impact. Because, only very few of them have been sustained over time - or funded" (Schiller). In light of this phenomenon, Schiller planed to take a different approach to education reform in the days ahead:

> Rather, at least where I'm trying to drive it, is that there are no new initiatives that would externally move schools, and what we have. Rather, where we need to go, is to provide the resources available to schools. For example, in my mind, that if we are able to work through the accreditation process, work through the assessment process - to then be able to provide much more concentrated technical assistance to schools that are not successful. Or districts that want to do some thing different. OK? A greater emphasis on teacher training. Teacher inservice. A greater emphasis on

assisting those schools that are not finding success. (Schiller)

Schiller saw this new approach as providing local superintendents with more opportunity to take on more responsibility concerning school reform. "To me it places the superintendent squarely in a position to be the major strategic planning and curriculum leader. An instructional leader" (Schiller). However, he also recognized that the superintendency has largely become a management position, and he admits, "There will be those who will still see their role as local superintendent to manage resources. There will be those who will see their role as to reshape how their schools deliver" (Schiller).

As far as changes in the State bureaucracy in the future, Schiller agrees that probably the State Board of Education will ultimately be neutralized or eliminated. Furthermore, he predicted that the State Superintendent will assume the responsibility and authority previously held by the State Board. He considered the possibility that the Superintendent's position will eventually be appointed by the Governor; one would assume that if the position did become the Governor's to fill, the Governor's grip on the education agenda could only tighten in the future. Schiller also predicted that local Boards will not be eliminated, although the role of the local Board will presumably change significantly.

If Runkel's opinion is to be trusted, Schiller's plans for significant near-future improvements may have been slightly misguided. "I don't mean he (Schiller) doesn't have talent, or anything of that nature," explains Runkel. "The hardest part is to understand this complex State. And it is complex. And he obviously comes up wanting in that area" (Runkel). Runkel's predictions for the future basically involve a continuation of the trends

going on presently mentioned by each of the four superintendents. He speaks of "more things in the Governor's office" as well as "more control in the Legislature," including "more legislative committees, which is going to be worse than dealing with the Department" (Runkel). The Department, meanwhile, is fated for dismantling, in Runkel's eyes.

If Runkel sees the future of the educational program as continuing along its present path, so does Porter, for better or for worse. The Governor and the Legislature will continue to hold the most sway, while the State Board and the Department of Education will continue to lose power. Meanwhile, the local superintendents will continue to be unhappy with what the future has to offer; in answer to the question, "are we going to be totally guided by the State level," he provided a resounding, "Yes." (Porter)

The researcher has described a relationship between the four sets of events (State's financial reform, Attorney General's Opinions, Legislative Mandates, and the State Board of Education Documents and Mandates) and the current reform efforts using the "institutional memory" of the four State superintendents. The research points to the four State Superintendents not believing that the role of the local Superintendent is being altered by the activist and progressive reform efforts of the State Department of Education. However, these reform efforts strongly prove that the State Department of Education has expanded its control over local public schools. This influence has had an effect on the role of the local Superintendent as he/she has had to institute the State Department of Education's new reform efforts. Again, the researcher's purpose in this

study was to describe how that expansion has altered the role of the local Superintendent and the organizational structure of the local public schools.

The Role of the Local Superintendent and the Organizational Structure of Local Public Schools in an Era of State Reform Efforts

What the background data (state documents, state superintendent interviews, legislation and AG opinions) demonstrate is that the state level educational bureaucracy now demands much more from a local school district administration in terms of equality, productivity and accountability, than it did before 1969.

In particular, the role and authority of the Michigan Department of Education over local districts has expanded significantly. The provisions of Public Act 25 of 1990, and Public Acts 335, 336 and 339 of 1993, list over 80 new requirements of a reform nature which local districts must accomplish and report to the state. For many of these reforms, furthermore, the legislature gave only minimal guidance - leaving the Department of Education broad authority to develop implementing regulations. Finally, the legislature gave the Department and the state superintendent authority to take into receivership any local district which fails to carry out reform measures to the satisfaction of the state.

It is reasonable to assume, therefore, that these new circumstances are having an effect on the role of the local superintendent and on the structure of the local school district; that the role may have expanded and become more complex than it was 25 years ago. It can also be synthesized that the organization structure of local public schools is

being altered by the effects of initiating the tremendous number of state reforms.

Conclusion

The researcher has described the educational reform efforts that have taken place over the past twenty-five years in the State of Michigan and how they have expanded the State Department of Education's role in governing public schools. On the one hand the research clearly shows that state officials see their actions as a series of discrete steps designed to solve a particular problem or respond to a particular emergency. On the other hand the state superintendents argue that their actions have not changed the role of the local superintendent. Furthermore, they believe the sum total of all reform efforts (legislation, AG opinions and Department of Education documents) has not changed the role of the local superintendent. Taken together these statements appear to be illogical: i.e., the state has specifically changed many things which were formerly left to local discretion, yet despite these changes the role of the local CEO has not changed. The data collection and analysis subsequently established whether local superintendents shared these perceptions.

Summary

The researcher's purpose in this study was to determine the effect of State reform efforts on the superintendent and the organizational structure of local public schools.

Thus far, the research has described the State reform efforts and has postulated that by assessing the impact of specific State reform efforts that were not in place twenty-five years ago, the role of the local Superintendent and the structural organization of public schools has changed.

Interviews were conducted with superintendents to identify how, and to what degree, specific reform efforts have had an effect on the role of the local superintendent and the organizational structure of local public schools.

Chapter Three

Methodology

The focus of this study is the interaction between state reform efforts and the role of the local superintendent and the structure and operation of the local district - as seen from the perspective of the superintendents. The researcher decided that some form of the participant-observer technique would be best suited for this study.

The researcher's role as a participant observer was subdivided into four categories by Gold (1958). His distinctions were based on the degree to which the researcher participated in the society under observation. When the true identity and purpose of the field research are not known to those who are observed, the researcher is considered a "complete participant." The greatest danger to this type of research is that the researcher will become completely immersed in the role and 'go native.' "Participant-as-observer" describes a situation where there is still a high degree of participation, but both the field worker and informant are aware that theirs is a field relationship. Even less involved is the "observer-as-participant" which is commonly used in one-visit interviews. Finally, the "complete observer" is entirely removed from interaction with the subjects.

> Here a field worker attempts to observe people in ways which make it unnecessary for them to take him into account, for they do not know he is observing them or that, in some sense, they are serving as his informants. (Gold 221)

The Participant Observer Method of Research

The participant observer technique has been used in sociological research with increasing frequency and acceptance since at least the 1920's, and adopted somewhat later

for educational research. Using Gold's taxonomy, Margaret Mead's studies, Coming of Age in Samoa (1928) and Growing Up in New Guinea (1930) were examples of "complete participant" observer research. She "went native" to the point of dressing like and learning the language of the Pacific island natives she studied. In 1928 she wrote:

> The method of approach is based upon the assumption that a detailed intensive investigation will be of more value than a more diffused and general study based upon a less accurate knowledge of a greater number of individuals. ...Furthermore, the type of data which we needed is not of the sort which lends itself readily to quantitative treatment. (Mead, Samoa 189-90)

Lohman (1937) used the technique in a study of the Gold Coast, Clark Street, Negro and Italian neighborhoods of Chicago's lower North side. Kluckhohn (1940) used this technique in her study of a small Mexican village where she took on the roles of housewife and part-time store keeper to gain acceptance in the community. She selected this method because:

> Participant observation is conscious and systematic sharing, in so far as circumstances permit, in the life-activites and, on occasion, in the interests and affects of a group of persons. Its purpose is to obtain data about behavior through direct contact and in terms of specific situations in which the distortion that results from the investigator's being an outside agent is reduced to a minimum. (Kluckhohn 331)

Other well-known studies using the participant observer technique were Lynd and Lynd's Middletown (1929) and Middletown in Transition (1937), William F. Whyte's Street Corner Society (1943), A. B. Hollinghead's Elmtown's Youth and, in one of the earliest uses of the term "participant observation," Dalton's Men Who Manage (1959).

Dean (1954) wrote a chapter on the participant observation method, in which he discussed 15 advantages to this type of research. For certain types of research, he explained, its superiority over the survey method of gathering standardized data.

> A major characteristic of participant observation and interviewing is its non-standardization. In fact, it aims to make a virtue of non-standardization by frequently redirecting the inquiry on the basis of data coming in from the field work to ever more fruitful areas of investigation. Changes in the research direction are made in order to chase down data more critical for the emerging hypotheses. (Dean 225)

Several researchers discussed the demands on accurate observation that the researcher may experience in a participant observer study. Becker (1955) used the technique in a study of medical school students with whom he lived and attended class. Because he was unfamiliar with this environment it caused Becker to doubt and discuss the problems a researcher has in making inferences from the data he gathers. For example, what does a student actually mean when he refers to a patient as a 'crock?' When another student complains about the number of homework hours over the weekend - what does this indicate about students' perspective on the amount of work they must do? Etc. Schwartz and Schwartz (1955) discussed the problems of using the participant observer method in their study of a small mental hospital ward. They found it difficult for the researchers to understand the nature of the interaction going on in the ward, especially from the patients' viewpoint. In this study the researcher's role was necessarily limited because they could not "participate" in being mentally ill. Vidich (1955) discussed how the social position of the participant observer will affect the data. He referred specifically to his work in the Cornell University study of 'Springdale' in upstate New York: "What an observer will see will depend largely on his particular position in a network of

relationships. ... The greater the social distance between the observer and the observed, the less adequate the communication between them. ... He [the researcher] always operates in the borderland of their experience and, hence is still faced with the problem of imputing meaning to their actions." (Vidich 354, 359)

Kolaja (1956) discussed a problem also mentioned by Schwartz and Schwartz - situations in which the researcher cannot completely participate to the same extent as the interviewee (i.e., where the subject is in physical pain and the researcher is not). (Gold would probably classify this as a "participant-as-observer" study.) Kolaja questioned,

> Should we study human behavior by performing the same or similar behavior, or is it satisfactory to grasp the relatedness between particular phases of behavior, rather to conceive than perceive the unity or similarities between the phases? (Kolaja 160)

Becker and Geer (1957) compared the participant observer method with other forms of interviewing, with the conclusion that participant observation is superior in several respects.

> We want, in this paper, to compare the results of such intensive field work with what might be regarded as the first step in the other direction along this continuum: the detailed and conversational interview (often referred to as the unstructured or undirected interview) ... We simply wish to make explicit the difference in data gathered by one or the other method and to suggest the differing uses to which they can legitimately be put. (Becker and Geer 28)

One such strength is when the researcher encounters resistance:

> Frequently, people do not tell an interviewer all the things he might want to know. This may be because they do not want to, feeling that to speak of some particular subject would be impolitic, impolite, or insensitive, because they do not think to and because the interviewer does not have enough information to inquire into the matter, or because they are not able to ... should [the researcher] desire to question people about matters they cannot or prefer not to talk about, he is able to point to

> specific incidents which either force them to face the issue (in the case of resistance) or make clear what he means (in the case of unfamiliarity). Finally, he can become aware of the full meaning of such hints as are given on subjects people are unwilling to speak openly about and of such inarticulate statements as people are able to make about subjects they cannot clearly formulate, because he frequently knows of these things through his observation and can connect his knowledge with these half-communications. (Becker and Geer 30)

To illustrate another strength Becker refers to an incident in his earlier research on medical school students. He observed that whenever resident doctors made suggestions to medical students, the students perceived it as being 'chewed out' - when that was not the case. The students' extreme sensitivity distorted their perceptions. Fortunately, said Becker,

> ... participant observation make it possible to check description against fact and, noting discrepancies, become aware of systematic distortions made by the person under study; such distortions are less likely to be discovered by interviewing alone. (Becker and Geer 31)

Geer (1964) discussed a number of phenomena which the researcher may encounter using the participant observation technique: establishing a relationship with the group to be studied; unanticipated data which the researcher must strive to capture; the surprising development of empathy for the subjects; anticipated problems which do not materialize; the nature of the working (and changing) hypothesis; recognition of major themes, etc. She concludes that "the first days of field work may transform a study, rightly or wrongly, almost out of recognition." (Geer, 397)

Cusick (1973) employed the participant observer method in a study of senior high school students in a rural consolidated district in New York state. He wrote that: "The research methodology which enables the researcher to get closest to the social situation

from the actor's point of view is participant observation." (229) Cusick also discussed what is both a limitation of participation research and its entry to further research:

> ... that participant observation is not meant to determine the final answer to any social phenomenon, rather it is purely exploratory and is to be used in cases where little work has been done. The final product of the study is the tentative explanation of social behavior which may be used to generate hypotheses for further testing. The end of the participant observer's work is the beginning of someone else's. (231)

In the current study the relationship of the researcher to the superintendents being studied would come closest, in Gold's taxonomy, to the "observer-as-participant" researcher. The researcher was a participant in the role of the Michigan local public school superintendent, but only a limited observer of the structure and organization of each district studied. The researcher suggests the term "role-participant observer" to describe this relationship.

Theoretical Sampling

The sample consists of 27 Michigan local district superintendents, some of whom were known to the researcher. The researcher was not testing a hypothesis nor trying to generalize to all local superintendents. The attempt was to develop a model which would describe and conceptualize the view that local public superintendents have of their role. The sampling technique, therefore, was not random but theoretical.

> Theoretical sampling is the process of data collection for generating theory whereby the analyst jointly collects, codes and analyzes his data and decides what data to collect next and where to find them, in order to develop his theory as it emerges. This process of data collection is controlled by the emerging theory, whether substantive or formal. The initial decisions for theoretical collection of data are based only on a general sociological perspective and on a general subject

> or problem area ...The initial decisions are not based on a preconceived theoretical framework. (Glaser and Strauss 105)

Glaser and Strauss described the difference between theoretical sampling and the statistical (random) sampling technique used in many research studies.

> Statistical sampling is done to obtain accurate evidence on distribution of people among categories to be used in descriptions or verifications ... Theoretical sampling is done in order to discover categories and their properties, and to suggest the interrelationships into a theory ... Random sampling is not necessary for theoretical sampling, either to discover relationships or to check out its existence in other groups ... The researcher who generates theory need not combine random sampling when setting forth relationships among categories and properties. These relationships are suggested as hypothesis pertinent to direction of relationship, not tested as descriptions of both direction and magnitude. (106-7)

Participants in the Study

The participants were 27 Michigan local public school superintendents. They range in age from their late 30's to their mid-60's; and in tenure as a superintendent from two to more than 30 years. Thirteen of the superintendents had earned doctorates in education and several of the other 14 were currently pursuing doctorates. This is reflective of the rising educational level of local district superintendents in Michigan. They serve districts with between 1,000 and 14,000 students, and together the 27 superintendents are responsible for approximately 115,450 students. Although theoretical sampling does not require the precise random sampling of a statistical study, the researcher chose one African-American and three women superintendents to reflect the growing diversity in the profession in Michigan. And, although the state reforms fall equally on all superintendents and districts, there may be regional differences in the

methods and resources employed in response to those reforms. Therefore, interviews were conducted in eleven different ISD's and regions of the state.

In order to study the in-depth perceptions of superintendents concerning their role, it was necessary to get them to talk at length and in detail about their world. This required a narrative rather than statistical, approach to the research. As the best method for gathering the data, the researcher selected interviewing as a "role-participant observer."

> The participant-observer establishes a relationship with a group. To a single informant, he is less of a stranger because he moves freely in the informants setting... Selecting a neutral, approachable role in the sense of acting and speaking in ways which are not threatening to informants smooths the first days of participant observation. (Geer 325-6)

The Researcher

In this study the researcher was, himself, a Michigan local school district superintendent with 21 years' experience as a superintendent. He had served as a school administrator in four of the 11 ISD areas involved in the study. As such, he had a basic knowledge of many of the districts being studied and was known as a colleague to perhaps half of the participants prior to the study. This facilitated his acceptance as a participant in the role of the local superintendent. On the experience of the interviewer, Douglas noted: "Direct experience is the most vital basis for all of the researcher's further methods of getting at the truth. All other methods rely ultimately, though in different ways and varying degrees, upon his own direct experience ..." (108)

To establish himself with all the superintendents to be interviewed, the researcher sought the help and endorsement of the Michigan Association of School Administrators.

A notice was placed in the association's newsletter and a cover letter was written by the executive director which asked for cooperation and expressed professional interest in the results of the study.

By this method of introduction and appeal the researcher attempted to gain a degree of confidence which would produce candid interviews; to generate the feeling among superintendents that "he was one of us." The researcher's sharing of the same role, and the endorsement of the superintendents' state organization were deemed critical to facilitating the level of trust and candor which were necessary to make the research meaningful.

> It is suggested that [researchers] ...may find...ways of creating a bond between interviewer and informant of such a character that the informant can be coerced into stating things he would otherwise leave unsaid. (Becker, Field 32)

Technique of Interviewing

As stated earlier, the researcher chose the approach of a role-participant observer to solicit the narrative responses for his data - rather than traditional interviewing, where the interview may be less structured and there is no prior feeling of affinity between the researcher and the respondent. That choice is one of the major influences on the data and, therefore, begs the question: "Was it a wise decision?"

Participant observation as a technique has its critics. Proponents of other techniques of data collection might argue that the participant observer's very affinity to the subject may make his study overly sympathetic, overly critical, deaf to nuances, or in some other way susceptible to distortion when evaluating the data.

The first step in evaluating the technique is a better understanding of the participant-observer process.

> Although the term observer suggests passivity, a participant observer in the field is at once reporter, interviewer, and scientist. On the scene, he gets the story of an event by questioning participants about what is happening and why. He fills out the story by asking people about their relation to the event, their reactions, opinions, and evaluation of its significance. As interviewer, he encourages an informant to tell his story or supply an expert account of an organization or group. As scientist, he seeks answers to questions, setting up hypotheses and collecting the data with which to test them. (Geer 383)

Unlike some forms of data collection such as questionnaires, the participant observer technique allows for, even encourages, the ability to shift the focus of the data collection even as the study proceeds. The advantages are:

1. The respondent's feelings can be revealed.
2. The cause of problems and solutions to problems can be discussed.
3. The respondent is given an opportunity for free expression.
4. Nonverbal behaviors can be observed and recorded by the interviewer.
5. The respondent may express personal information, attitudes, beliefs, and perceptions that might not have been obtained by a self-administered questionnaire.
6. It provides for a higher rate of participation.
7. The interview can follow-up answers or probe for additional information to clarify answers. (Tolor 197)

The participant-observer technique not only affords the flexibility to range widely in areas the researcher planned; it permits the immediate collection of data never foreseen - data which may add depth or interest to the study without compromising its validity.

> If, as will nearly always be the case, there are unanticipated data at hand, the field worker will broaden his operations to get them. Perhaps he includes such data because they will help him to understand his planned objectives, but he may very well go after them simply because like the mountain, they are there. (Geer 378)

Finally, there is a problem associated with any type of interviewing. "Data, no matter how you collect them, are recalcitrant. They [respondents] will not always answer

the questions you put to them." (Geer 375)

Notwithstanding these potential problems, the researcher found the role-participant observer technique well suited to gathering data for the purposes of this study. Since only one stratum in the school hierarchy was being interviewed, over-rapport to the detriment of other strata was not a problem. The researcher felt sufficiently experienced and competent to recognize the significance of data as they emerged. The credibility of superintendents' statements did not appear to handicap the data; in one instance after another, superintendents' candor to the researcher was remarkable, when discretion would have been expected, if they wanted to guard their true feelings.

Lastly, this researcher can certainly attest to the abundance of data generated by the role-participant observer technique, and the difficulty of organizing it to reach valid conclusions. The transcripts of the interviews conducted in this study totaled 596 typewritten pages. But this is a necessary result of, even evidence of, having done a sufficient amount of theoretical sampling.

Conducting the Interviews

The researcher is a participant observer, not because he shared in any specific actions with the participants, but because he shares in the role they perform and live.

Superintendents were asked by phone or at professional meetings to participate in the study. Concerning the setting, Garrett said: "The physical setting of the interview may determine its entire potentiality. Some degree of privacy and a comfortable, relaxed atmosphere are important. Interruptions and telephone calls should be reduced to a

minimum." (72-3) The interviews were conducted in the superintendents' offices where they would feel most at ease. Merton discussed how the:

> ... social atmosphere of the interview significantly affects the extent to which pertinent reports are elicited and the ease with which this is accomplished. A tedious interview is usually a profitless one. The interviewer can do much to establish the tone of the interview by clarifying, at the outset, the purposes of the inquiry and by defining his role as well as that of the interviewees. It is for him to set the stage so that the others will have genuine interest in playing their parts." (Merton, Focused, 171)

In very general terms the researcher explained that the purpose of the study was to describe what it's like to be a superintendent, what groups and factors influence the superintendent's role and the district's structure, and if, how and why the role and structure are changing. Prior to beginning the interview, participants reviewed and signed the required UCRIHS consent form. As guaranteed on that form, the names of superintendents and districts were changed to insure anonymity. (See Appendix B)

The participant and the researcher sat facing each other with a tape recorder placed on a table or desk between them.

> While a tape recorder on the spot provides the fullest recording, it is expensive and formal. The expense of the machine is the smallest part of the problem. (I bought three; burned out two.) Transcription of an interview is an exceedingly time-consuming task, even for an experienced stenographer. If expense is no problem, the interviewer still has to cope with the additional formality provided by the recording equipment. Informants are likely to talk more for the record with the machine than without, even when they have been told that the interviewer is going to write up the interview later. Where the interviewer has strong rapport, informants may accept the machine with little hesitation, but in the early stages of the study its introduction may damage rapport." (Whyte, Learning, 114)

The participants wore a small interview microphone clipped to their necktie or upper clothing so that their responses would be clearly recorded throughout the interview.

The researcher began the interviews with several 'icebreaker' questions concerning the superintendent's administrative background and a description of their district in terms of size, geography and demographics. The next set of questions ask how and why they became superintendents, their prior expectations of the role, their subsequent experiences, the influences and demands on them and the source of those demands. Tolor said:

> The interviewer should proceed to ask questions which serve as a warm-up for the major research questions. ...these warm-up questions are usually specific, non-threatening, and relevant to the study. Once the warm-up questions are dealt with, the respondent is usually oriented to the interviewing process and ready to attempt the major questions. During this phase, the questions should proceed from general to specific and from one aspect of the topic to the next in a well-integrated manner." (Tolor 202)

At this point in the interview the reform activity of the state education bureaucracy has been referenced at least once. So, the next series of questions focus on the relationship between the state and the local superintendent and the effect that the state activity is having on the role of the superintendent.

The following questions focus on specific categories of reforms and their effect on the local district's structure. Later questions concern the relationship between the state demands and the local Board of Education response. The final set of questions explore the effects of the reform era on the professional and personal life of the superintendent, the future career plans of the participant and their colleagues, and a reflection on whether they would repeat the same career choices. Throughout the interview the researcher would ask follow-up questions, shuffle the order of questions or deviate from the list of questions to pursue responses which might enrich the study. (See Appendix C)

Interviews took approximately one to one and one-half hours to complete. The taped interviews were transcribed by the researcher and all participants received a copy of their interview. Any corrections noted by the participants (usually the result of muffled responses on the tape) were made. The transcribed interviews were analyzed to extract the data used for findings, conclusions and recommendations of this study.

Scope and Evolution of the Questions

The questions posed by the researcher underwent a continuous evolution. During the first three interviews at least 25 different subject-matter questions were asked of superintendents. This did not include a number of follow-up questions which were often necessary to fully explore a particular subject. Several of those early questions were discontinued somewhere between interviews #3 and #4, either because they proved to be too general or vague, too complex, or because they were later incorporated into questions which produced more fruitful responses. The researcher and his committee chairman developed new questions aimed at the core concepts of school structure and the superintendent's role. These questions then supplemented previous questions while conducting the last 24 interviews.

Relevance of the Study

Superintendents are such a unique and limited group of only 525 people in Michigan that they are the best source of data for this study. Yet, there will be seen significant differences among superintendents about how they describe their life and the

influences on their role and district. Therefore, in any non-random study of 27 participants, there is concern with its generalizability to the larger population of superintendents. No claim of generalizability is made for this study. However, the researcher believes that the perceptions, experiences and responses of 27 superintendents will have interest and significance for all superintendents.

Chapter Four

Analysis of the Data

The researcher's purpose in this study was to determine the effect of State reform efforts on the local superintendent and the organizational structure of local public schools. The researcher has described the State reform efforts and has postulated that by assessing the impact of specific State reform efforts that were not in place twenty-five years ago, one will be able to determine how the role of the local superintendent and the structural organization of public schools has changed.

Superintendents were asked questions to assess what, from their perspective, the State reform efforts were demanding as part of (or changes to) their role, and what their responses were to those demands. Also asked was what demands or changes did they perceive were being made to the structure and operation of the local school district, and how did the district respond to those demands.

It is important to consider the perspective of superintendents as they attempt to comply with 208 separate reforms enacted over 25 years. In matters of reform, the members of the state educational bureaucracy - the legislature, the governor, the state board, state superintendent and (occasionally) the attorney general - are clearly the 'authority' behind the demands, and the local superintendent and district are the recipients of those demands. Barnard, in Functions of the Executive (1938), wrote that in matters of authority, the recipient can and will accept communications from an authority only when four conditions exist simultaneously: "(a) he can and does understand the communication;

(b) *at the time of his decision* he believes that it is not inconsistent with the purpose of the organization; (c) *at the time of his decision,* he believes it to be compatible with his personal interest as a whole, and; (d) he is able mentally and physically to comply with it." (Barnard 165) For a local superintendent, the organization with which he or she is concerned is the local district, and their personal interest is the educational welfare of the students. Yet the state directives which demand compliance with the various reforms, are often presented to superintendents for implementation without detail, clarity or purpose. As the superintendents in this study discussed their response to the reforms, it is remarkable how often they referred, in their own words, to state directives which would violate one or more of Barnard's four conditions.

In the present study the researcher interviewed 27 Michigan local public school district superintendents and one intermediate district superintendent. The focus of the study was a series of school reform measures enacted by the Michigan legislature or mandated by the governor, state superintendent or state department of education between the years of 1969 and 1994. For the purpose of this study those reforms are grouped into five categories: communications, finance, personnel, general administration and curriculum.

Communications Reforms

Thirteen of those measures dealt with various aspects of communications reforms including open meetings, accessibility to districts records, annual reports to the public, reporting data by gender, informing employees and the public about asbestos, chemicals

and hazards in the workplace, performance standards and site-based decision-making which involves citizens and staff.

The researcher sought to find the effect of communications reforms on actual communication. There is no question that the reforms have had an effect, in fact multiple effects. Superintendents now have to inform the public, the board, the staff and other groups about the reforms; and they must communicate by the methods and mediums now required by the state. Specifically, three major themes emerge from an analysis of the superintendents' responses concerning communications.

First, the superintendent has the ultimate responsibility for communications affecting the school district and must perform that function in an environment of difficulty, frustration, mistrust and apathy. Second, significant time and resources of the superintendent and the district are spent on communications with little resulting interest by the public. Third, superintendents must combat frequent attempts at misinformation, or misuse of information, about their schools - which is communicated to the public by other interests.

Chart 4-1: Communications Reforms Frequently Cited by Superintendents

* PA 267 (1976), the Open Meetings Act; whose impact is felt at every school board meeting, budget hearing and public interview. It requires that, whenever a majority of school board members meet to discuss any school-related business, that meeting is publicly posted in advance, held in public, with decisions made in public and minutes made afterward available to the public. The purpose was to expose all board operations to public scrutiny and allay suspicion that public-interest decisions were being made without that scrutiny.

* PA 442 (1976), the Freedom of Information Act; requires school districts to open most records, documents, correspondence, plans, etc., of the district to the public and provide copies of those records upon demand. The few exceptions to the act concern personally identifiable information protected by other laws.

* PA 25 (1990); requires districts to compile, publish and disseminate to the public, a wide variety of data concerning each building within a district and the district as a whole. Included are annual MEAP scores, ACT and SAT scores, accreditation status, attendance at parent-teacher conferences, drop-out rates, long-range plans, annual goals and objectives, etc. Failure to issue annual reports as required may penalize a district by loss of five percent of its total revenue.

Other sections of PA 25 require each building and the district to adopt a mission statement, a continuously updated three-to-five year plan of goals and intermediate objectives, and a permanent strategic planning process.

Public Act 335 (1993) required districts to make a comprehensive Annual Education Report to the state, adopt a core curriculum, require student portfolios, administer a high school proficiency examination for 'endorsed' diplomas, etc., and communicate these requirements to the public. PA 335 also required districts to design and implement a site-based decision-making process that involved staff and community in the educational decisions made for each building and the district.

From the information gathered for the required state reports discussed above, Governor Engler ordered the publication of an annual Governor's Report Card on public schools. Its data portrayed Michigan public schools as a failing system which needed strong governmental discipline, and as a system needing competition in the educational marketplace.

The first major theme to emerge from the analysis is that the superintendent has the ultimate responsibility for communications affecting the school district, and must perform that duty in an environment of difficulty, mistrust and apathy. In many communities, the task of communicating with the public is hard, and frustrating because it has such indeterminable effects. Breck (Farley School District): "...we make tremendous efforts to communicate with our various constituencies, internal and external."

Giammarco (Oswego) explained the difficulty of this task: "Trying to communicate with the public and send out all this wonderful stuff we're doing is not going to make any difference right now. We have to have some serious society changes before we can see an effect in peoples' perception of schools. ... people don't read most of the stuff you send out anyway." In another community, communication has become an all-consuming responsibility. Hill (De Soto): "...we bend over backwards to try to let people know what we are doing. That's become one of the things, I think, that superintendents have to spend a lot of time on, that they didn't used to." These viewpoints reflect a widespread frustration among superintendents in public communications.

Another point is that superintendents must communicate in what they perceive as an environment of general mistrust of all governments, including schools, by the general society. What does it mean to spend substantial district time and resources complying with state-mandated communication requirements, only to have the local public ignore or distrust those efforts? How does it feel to faithfully report data to state agencies, only to have that data frequently manipulated so as to embarrass or undermine the efforts of educators and the achievements of children?

McKenzie (Greenfield) described what it's like: "I don't think anybody could've predicted that the attacks on public education would become as dramatic as they've become. Both from inside and outside. I mean, we certainly have the anti-public school people out there in the business community arguing that we somehow have to de-regulate the system ... well, shoot, we now have the state board president who has taken that position as well." Buth (Clear Lake) discussed the effect on citizens: "People grow

everyday more unhappy with government, and schools are government. So, it's just a terrible attitude created partially by the political leaders, particularly, against schools ... that isn't necessary." Hill (De Soto) stated: " ... public schools are subject to much more criticism these days than they were previously." Because of this exposure, he explained, " ... we do a lot more communicating around here than we used to and probably most school districts do more of that. We are doing it here just to try to fight the perception that we are like every other school district and we are not doing anything right here." Davidson (Justice) discussed some of the consequences of this type environment:

> ... at the national level and at the state level, the politicians have continued - and the news media have continued - to harangue that the schools are not doing the job ... that public schools have failed ... and this whole arena of not having any respect for authority is affecting teachers in the classroom, principals as they attempt to provide leadership to the building, and certainly superintendents. So I think the public perception of education is that 'You're doing a lousy job, so why do I need to listen to you?'

Breck (Farley) observed the public's perception of schools as, at the very least, questionable: "...any public institution is the subject of so much **mistrust** today ... we're like all institutions in all of society, subject to public mistrust. It starts in Washington and it washes right through local government." Hunsberger (Clayton) agreed: "I think we have a general public, a general society, that mistrusts all bureaucracies, all institutions."

Superintendents report that, because of this mistrust, apathy or other reasons - their communications efforts have not produced enough public **involvement** with the schools. Halder (Braymer) explained the irony in trying to increase communications with

the public: "...we continue to have improved communications as one of our board and district goals. We update our implementations strategy every year. And yet I find **less** involvement in the schools today than I did ten years ago when these programs were in their infancy stage." Buth (Clear Lake) spoke of the difficulty in trying to involve parents: "There's less participation by parents generally, at a time when the governor would have us turn it over entirely to parents. Parents don't want it. That's silliness. They just don't want it." Barber (Clay) also finds getting community involvement to be an arduous task: "I don't hear much from community members on what it is they want us to do, or do differently. And it's been very, very difficult for us to do a good job of getting their involvement."

In view of this mistrust and apathy superintendents see the Open Meetings Act, the Freedom of Information Act and other communications reforms as efforts to improve openness with, and generate trust from, the public. Walls (Ottawa) saw value in the Open Meetings Act in the sense that the reform could remove a possible point of contention:

> Well, the effect that I think it's had is taking the suspicion away. It doesn't mean that people are more informed or better informed because many people don't listen to what's going on there. But they have the ability to become informed and I think that's the key to the whole thing. A board can't get behind closed doors and do something that could affect the entire community, without the community's knowledge. It just can't happen anymore. So that seems to me to be the value of all that. It keeps the board from being victim of claims being made that they did something in secret.

Barber (Clay) supports the Open Meetings Act because it has opened communications and made districts more accountable.

> When I was in Livonia, the board would meet in executive session prior to every board meeting. They would come out in board meetings - we're talking back in the early to mid 60's. And it would be just 'wham bam.' The real board meeting all happened in executive session. And that's not right. That's not right. So, from just open meetings act, I think there has been ... I think it's been good for every body. The school system, the board, everything. That you just need to deal with stuff open and above board and I think that act has forced districts to fall in line.

Eastman (Buffalo) sees the communications reforms as preventative measures: "I've always operated under the open meetings act and I have board members complain that they can't go into executive session and talk about things they want to talk about. And, as often as not, I don't want to go back and listen to gossip about these folks and I think that kind of expedites things."

Buth (Clear Lake) expressed his concern over the outcomes of such reforms: "When you have a public meeting and the nuts and the kooks show up and just raise all kinds of hell and all of that's reported in the newspaper. Then the average Joe out here is reading, 'Wow, look at all that's going on. I wonder, is there any truth to that?' So it just caused even more disruption, I think, in schools than that. I believe you ought to share your information, but to create those artificial laws that forced it when it wasn't necessary, I think hurt us more than it helped us." Buth doesn't feel the people who really want to know more about the district are benefitting from these reforms. "The only people that use the freedom of information act are the nuts and the kooks. That's who I get those requests from. You know, it's not the average parent who really wants to learn more about the district. Most people feel [it's] worse. They feel like there's less communication."

Steel (Washington Crossing) described the positive effect of a 'no executive session' policy: "The state open meetings act ... though, has had an impact upon boards of education. They don't go into executive session because - our board won't - because I won't let them, for a number of reasons like they used to before. I think you see less discussion of personnel in executive sessions that took place that would be illegal today. And I see a lot of that being much more open. I see that as a positive."

Despite the best intentions of reforms meant to promote more openness, superintendents believe that public trust cannot be established or enhanced through legislation but must be earned by local school boards and superintendents. Superintendents make the point that either public distrust is an irrational element that cannot be assuaged by rational methods, or that public distrust is based on deep-seated antipathy toward public schools that cannot be addressed directly through more information and openness. Moreover, the public access guaranteed by PA 25 is actually making the schools more vulnerable to these critics.

Daley (Vernon Hills) knows there are supporters and critics of schools, and few of them jump sides. "I think those people who trust you and support you - trust you and support you. And those who don't - don't. And those who are skeptics and critics ... they just find another way to criticize, no matter what you do. There are not too many converts." This belief is shared by Garrison (East Burlington), who concurs that supporters of the schools are loyal because of local actions, not state mandates: "I think that what it takes for a local superintendent to gain credibility cannot be mandated. In other words, people trust you or trust the board of education or trust the

schools because of a network of decisions that they make ... the state cannot come in and mandate a series of acts which will buy you, if you will, credibility. As a local superintendent, there is nothing that has been done in Lansing that has enhanced my credibility in this community."

Likewise, Montrose (Lowden) doesn't see any improvement from these reforms: " ... we have done all kinds of things in response to [reforms], but if anything, ... we have not made any progress on bridging the - call it the 'distrust level,' the credibility level. ... a lot of people are either not paying attention or believing whatever they want to believe. So we haven't made any impact there."

Mandates cannot generate trust, as Wilson (Dumont) states: "I think this is a case where you find you can't mandate excellence, where you can't mandate or legislate trust. While we have so many hoops to go through, of rules and requirements, I think the public in general is **doubtful** that they're getting accurate information. And they're skeptical that everything **is** being done in the public ... the ways that the rules and regulations identify that it should be."

In summary, the first major finding concerning communications is that the superintendent has the overall responsibility for communications affecting the school district, and must perform that duty in an environment of difficulty, mistrust and apathy. The task of communicating with the public is often difficult because it has such indeterminable effects, and takes place in an environment of general mistrust of schools and all government. Because of the mistrust and apathy, communications efforts have not produced enough public involvement with the schools. The Open Meetings Act, the

Freedom of Information Act and other reforms are seen as efforts to improve openness and trust with the public, but they fall short because public trust cannot be earned or enhanced by legislation. Public distrust is often resistant to rational response, or is based on deep-seated apathy that cannot be addressed by more openness and information.

The second major theme to emerge from the analysis is that the superintendent and the district expend substantial time and resources on communications efforts - with little resulting interest from the public. First, the superintendent must inform the board and the community about the objectives and specifics of those reforms. Halder (Braymer) described her role as: "...trying to educate the community on how we can incorporate 335 and 339 into PA 25. So it's almost an evolving communications process." Daley (Vernon Hills) sees his job as " ... trying to inform the board what we have to do and why we have to do it, and how we ... advising them and recommending how we can do it best. And the community. The board first, and then the community." Winer (Van Horne): "I tell the board we need to do this, we have to do it. It says in the law that we need to do it."

Also, superintendents must often communicate with the very legislators who passed the reforms and educate them about the local effects of those reforms. Garrison (East Burlington) resents having to 'teach' legislators: " ... I have to spend time trying to educate someone in the state legislature when that time could be used directly to work with principals, teachers, etc. I find that's frustrating and diverting from what is, indeed, my major task." Giammarco (Oswego) discussed a bill which would (unintentionally) hurt her district: "So now I have to go back, write letters to the legislators, send faxes, go to meetings, etc. in order to get the language changed again ... you don't know how much

time and energy that has taken from what I should be doing here. And that is the rule, not the exception, today with what is happening at the state level." Steel (Washington Crossing) recounted a meeting with his representative concerning the implementation of a reform: "It was Monday we met with him: four superintendents from the county. And he got a response to me yesterday already. He is investigating it and he said that their oversight panel that the legislature - the Republican party - has will look into this. Because this is not what the intent of the legislature was, even though the Department of Education is doing it." Eastman (Buffalo) discussed an example of legislation so complex that the local effects could also exceed the legislative intent:

> I just finished a letter to [state Sen.] Joanne Emmons that I'd be happy to give you ... the latest thing that [I'm] railing about is a proposal I came across that's going to establish **allowances** for people who were residents of high-foundation-grant schools who sent their kids to low-foundation-grant schools ... who get to **bank the difference**. And then get to use that banked difference for tuition at college or some other purpose. And it strikes me that that's just rubbing salt in an already very open and sore wound ... in that a kid from Forest Hills [wealthy area] discovers the educational bargain in Buffalo [poor area] and says "Well gee, I can get the same education in Buffalo. If I transfer to Buffalo, I can also bank $2000 a year towards my college expenses." What that really says, with that kid crowding our kids in the back seat of the educational bus - the fiscal bus in this state - is that darling Forest Hills kid is not only worth $2000 more when he's sitting in a Forest Hills classroom. The same kid can come to Buffalo and he's **still** worth $2000 more. Why are we treating Buffalo kids like 3rd class citizens when we pay the same in property tax? I pay the same six mills that folks in Forest Hills are finally now paying - they used to pay less in property tax than I - but I pay the same six mills that they pay ... I pay the same 6% in sales tax, and I pay the same 4.4% in income tax that they pay. **Why** is the Forest Hills child worth more than my two children? And they **are!**

(Perhaps because of the complaints of Eastman and other superintendents, the above proposal was never enacted by the legislature. But this anecdote illustrates the

important role of superintendents in communicating with legislators about the local effects of reform legislation.)

In addition to the superintendent's duty to inform everyone about state reforms, after a district has developed a mission statement (required by PA 25), the superintendent must generate support for that mission, and portray the mission in a positive way. Duffy (Northridge): "... my job is to forward the mission of the school district. And so every thing that I'm saying and doing always has to come back to my ultimate goal which is to forward the mission." McKenzie (Greenfield) finds generating support of the mission as a challenge: "... it means a new ball game and it means we all better be spending a whole lot more time finding a way to kind of mobilize people in support of 'the system'." Hill (De Soto): "...it's much more of a public relations kind of a business in this environment than it used to be." So, portraying a district mission becomes increasingly difficult because trust in and support of the district must be generated at the onset of the mission.

The primary vehicle designated by the state for informing the public about the district's mission and achievements is the Annual Report (PA 25). Superintendents report that producing the annual report has significantly affected them and the operation of the district. Hunsberger (Clayton) remarked on the accountability factor:

> You know it's the time of the year where we have to have annual reports in and that we better make sure that we have things in order; that we are meeting all the state compliances. ...I'm having to hold other people accountable to make sure that those elements are completed. So it becomes, you know, a constant impact for me of saying to other people: "Are we keeping on track to make sure that we are covering all the necessities that we must do to take care of reporting?"

Questioning the amount of time spent on the annual report, Winer (Van Horne) said: "The annual report ... to sit and take time to do that ... we're wasting a lot of man-hours putting those things together, that could better be spent in some other way. We're wasting a lot of paper kicking these things; and the cost of paper has tripled. Is that a good use of our resources?" Garrison (East Burlington) is skeptical of the annual report's value: "To the degree that we are needlessly expending energy to, for example, write reports - which by their very number will not be read - seems to me to be somewhat wasted energy. I mean if, for example, we do these PA 25 reports, which we know are going to go unread - then I really wonder what the value is." McKenzie (Greenfield): "...your annual reports now have to look a little different because someone has decided that it must include this, this and this. ...and they end up creating this kind of cumbersome reporting mechanism."

The final point in this theme is that, despite the substantial resources which districts expend to produce the annual report, the public has shown little interest in reading the reports or attending the meetings where they are discussed. Buth (Clear Lake): "The annual reports, I thought, were great." He sees the need for them but questions their worth. "You know, we should be reporting what's happening. Again, I'm not sure anybody out there really cares, though." There is a strong general feeling that annual reports are useless to the majority of the public. Geyer (Griswold): "I honestly have to say I think that probably a good 30, 40, maybe 50% of the people who see our [material] put it in the wastebasket. I think a lot of our stuff that goes out - doesn't get read." Walls (Ottawa): "The annual report is sort of like the financial report. It provides

information for people if they have an interest. We just haven't found anybody interested in it." The reaction to the annual report illustrates a phenomenon which occurs frequently throughout the study: the state board and the legislature often hold an idealized view of schools which does not fit well with the local reality. Davidson (Justice): "...frankly, if the annual report disappeared tomorrow, I don't think anyone would question it because it is really kind of a non-event." Winer (Van Horne) "We had our annual reports last night. We had open house. We had one person show up." Barber (Clay): "Annual reports are a waste of time."

Therefore, the second major finding concerning communications is that the superintendent and the district expend significant resources on communications efforts - with little notice from the public. The superintendent must tell the board and the community about the objectives and specifics of each reform. Also, superintendents must often tell legislators about the local consequences of reforms. The superintendent must facilitate the development of a district mission statement, portray that mission in a positive way, and then generate support for that mission. The primary vehicle for informing the public about the district's mission and achievements is the Annual Report. The district commits substantial resources to produce the reports, but the public shows little interest in either reading the reports or attending the meetings where they are discussed.

The third major theme to emerge from the analysis is that superintendents must frequently combat attempts at misinformation, or misuse of information, about their schools - which is communicated to the public by other interests. Superintendents report spending significant time and organizational resources combating misinformation

emanating from either the media, politicians, realtors or public school critics. Hales (Cambridge) commented on this: "More importantly though than the time spent to pull the data is the time spent reacting to the report or the misinformation, misapplication, misinterpretation that comes out of these things into the press and media." McKenzie (Greenfield) discussed how he's fighting for schools: "All of us are on the front line in defending public education. I don't think anybody could've predicted that the attacks on public education would become as dramatic as they've become. Both from inside and outside. I mean, we certainly have the anti-public school people out there in the business community arguing that we somehow have to de-regulate the system ... well, shoot, we now have the state board president who has taken that position as well." Bowman (Landcaster) sees the battle coming from many corners: "I think it is [a] fact that at the national level and at the state level, the politicians have continued - and the news media have continued - to harangue that the schools are not doing the job ... that public schools have failed ..."

Superintendents specifically cited the Governor's Report Card. They reported that the general public seemed to ignore this document - either because of its attempt to portray public schools unfavorably or because of the same apathy shown to any education report. Garrison (East Burlington) referred to that apathy: "... and I think a good example of that is those governor's report cards which we had to fill out forms for. As we speak, I have not had **one** request from a citizen for that information." Eastman (Buffalo) has no use for the document. "The governor's report card is goofy and convoluted, and is so fraught with goofiness that people ... it's a flash in the pan. They publish it one day,

and nobody's talking about it two days later." The public has no interest in the Governor's Report Card, as Hill (De Soto) discussed: "They sent us here three cases of the first issue of the governor's report card ... we had two people come in here and ask for copies. And one of them was because I sent that person in. People aren't looking at that." Stewart (Rockwell) discussed how the high school 'non-completion' information for his district was mis-reported:

> The information on my district was so distorted, so inaccurate, and ... there was one of the reporters for *The Grand Rapids Press* doing a special story on this. She called me and I said, 'Well, I'll be happy to fill you in on every detail that was wrong in ours.' She listened for quite some time. It was so bizarre that it made us appear to be incompetent. A graduation rate of 83%, you know? Drop-rate of seven or eight percent. I mean, I guess it's actually ½ of one percent. It's nuts. Where did they get this information? So, essentially the headline in *The Grand Rapids Press* on the front page was 'Governor Flunks on Report Card' and went on from there. So I don't think as long as we were able to get the truth out and be able to at least provide constructive criticism ... that thing is going to die. I don't think too many people put a lot of credibility [in it].

Interestingly, one example of state and local reporting which superintendents **do** support - even though the data are sometimes mis-used, is MEAP scores. The Governor's Report Card and other state reports array annual MEAP scores (by 4th, 7th and 10th graders) in a format allowing easy comparison between districts. Superintendents find this practice professionally irritating because the scores of individual ability are used to make general conclusions about the comprehensive quality and effectiveness of each **district** - conclusions that were never intended or claimed by the test designers.

In order for the reader to appreciate the significance of this finding, a brief explanation of the MEAP may be helpful. The Michigan Educational Assessment

Program (MEAP) was created in 1969, and the scores were norm-referenced for the first two years of its existence. Since then the test has been criterion-referenced and the purpose of the scoring system was to allow classroom teachers to identify which skills students were having trouble with and improve the teaching of those skills. So the purpose of scores was to measure the students' achievement against their ability. When, over several years, a majority of students demonstrated mastery of the skills measured on the tests, the tests were re-designed to make them harder. The re-design was validated by having people take both the old and new test versions together; as a result a 90th percentile score on the old version equated to approximately a 40th percentile score on the new. When the 'new version' test scores were publicly reported, the difference in difficulty was often unreported. Explaining that apparent drop in scores to the public was, in itself, a frustrating communications task for superintendents. Geyer (Griswold) explained the frustration of this 'new version': "On the old MEAP, you know, our kids were scoring in the 90th percentile. 90% of our kids, plus, were achieving all the objectives. Then they changed it, and it shoots down to 40% or 30% or something like that. And I think some people [critics] were able to fulfill their prophecy by creating a statistical appearance that that had happened." The comparison of test scores between districts has been frequently misused by politicians, realtors and the media to make value judgements about the quality and efficiency of entire school districts. Seymour (Forest City) expressed the frustration of many superintendents over **how** MEAP scores are used to compare districts: "You cannot compare ... two school districts. It's wrong. And as long as we want to make all this public and report it all, it sends a false sense of

security. Not only to our kids, but it's insulting to other people. And it's only one measure but, boy, the state loves those numbers. I'm not suggesting that MEAP tests aren't one measure of success, but that's **all** they are." Despite this misuse, many superintendents - perhaps surprisingly - generally support the continued reporting of scores. Hill (De Soto) understands their value:

> If I were in a leadership role in the state, I guess what I would say is I would sustain the MEAP reporting and I guess I don't have a problem with having some expectations tied into MEAP performance. I think the state ought to set high expectations or reasonably high expectations, that districts working hard with their students can meet and then stand out of the way and let the districts figure out how to get there. Hold them accountable. Go ahead and put the stuff in the paper every year so that we can see how we are doing because that does create some pressures within districts to figure out how to get improved performance.

Discussing the value of reporting MEAP scores, Walter (Spruce) agrees they're mostly positive. "Yes. I'll tell you why. It's like the editor of *The Grand Rapids Press* tells the Kent County superintendents - when they [*Press*] publish the MEAP results on the front page of the Sunday *Press* every year. He says, 'When you guys have something else that you want us to take a look at, we'll consider publishing **that**. But until you do - we're going to use the MEAP.' I think MEAP has brought a focus that we didn't have before." Geyer (Griswold) is frustrated with " ... that whole process ... to keep the target still long enough so that people can start hitting it, before you change it." These responses are significant because, despite the misuse and misinformation surrounding the reporting of MEAP scores, not all superintendents find MEAP reporting negative: many see the reports as a necessary technique to make districts improve student performance.

In summary, superintendents report that they must inform and educate the board and community about the objectives and specifics of state reforms. In many communities this communication effort is difficult because of apparent public apathy. The superintendent must generate public support for the district's mission and portray the mission in a positive way. The state-designated vehicle for informing the public about the district's mission and achievements is the Annual Report; producing it has consumed substantial resources and affected the operation of the district. The public has shown little interest in the Annual Report, and even less in the annual Governor's Report Card. Superintendents generally support and communicate the annual reporting of MEAP scores - despite frequent misuse of the scores by others. There is a general societal mistrust of all governments - including public school districts. Although several reforms were specifically enacted to foster openness and trust between the districts and the public, superintendents feel that those reforms have not been particularly effective. They feel that trust and support either are, or are not, earned locally. Superintendents report that their districts, and they personally, spend much time combating misinformation by the media, politicians and others: they must often operate in an environment which is hostile to public schools. Finally, superintendents often must communicate with, and educate, legislators and other state officials about the local effects and consequences of reforms already enacted or proposed.

In this environment, the superintendent stands at the intersection of the various streams of communication between and among the state, the local board, the staff, the general public, the media, supporters, critics and students. More than any other

individual, the superintendent has the role responsibility to communicate with and educate each of those groups, interpret their objectives and concerns, detect negative consequences, counter misinformation, and serve as an honest broker among diverse groups with conflicting values and objectives. It is the superintendent's role that must change with each day, each new mission, each public interest and each government mandate. Communication must be developed among all parties; trust must be generated between the schools and the public, as well as between the schools and the legislature; and information must be reported accurately to prevent damaging the communication and trust already established. The bureaucratic zone of indifference must be eliminated. These monumental tasks rest ultimately on the shoulders of the superintendent. Superintendents must prepare for the unknown and make decisions for the unprecedented. It is these responsibilities and pressures that define their ever-changing role.

Finance Reforms

The focus of the study was a series of 208 individual school reform measures enacted by the Michigan legislature or mandated by the governor, state superintendent or state department of education between the years of 1969 and 1994. Forty-nine of those reforms dealt with various aspects of finance reform including financial accounting, school taxes, annual state aid legislation, lottery revenues for education, freedom of information as it pertains to finances, the truth in taxation process, the Headlee tax limitation amendment to the Michigan Constitution, computers of tomorrow, specific state aid

incentive programs, professional development, social security and retirement obligations, and financial penalties for non-compliance.

Of the 49 separate financial reforms enacted over the 25 years under study, the most far-reaching of these was the legislative initiative and voter approval of Proposal A in March 1994. Many finance reforms dealt with issues that were short-term or technical in nature. Districts had to implement these changes, but they did not 'stand out' in the memory of superintendents as issues which affected their role or the operation of their district. But a smaller group of reforms, described below, **did** stand out and were often mentioned during the interviews as examples of how finance reforms often needlessly and expensively affected the operation of their districts.

Chart 4-2: Finance Reforms Frequently Cited by Superintendents

* PA 451 (1976) established a 24-digit accounting code for recording all district revenues and expenditures. The purpose was to facilitate easy comparisons between buildings and districts by item or function, and therefore promote fiscal accountability. It required districts to invest heavily in equipment and training, requiring a two-year delay in implementation, and still it caused the retirement of many school bookkeepers who were unable to understand the new system.

Voter Referendum and PA 35 (1978), commonly called the Headlee amendment to the Michigan Constitution. It limited school funding increases to the Consumer Price Index of the previous year unless voters approved otherwise.

* PA 40 (1981) created the Michigan Lottery and allocated 45% of the proceeds to the state school aid fund. During the campaign for adoption, and for years afterward, state officials allowed the public to believe that the lottery proceeds were **in addition** to a continuation of the previous level of general fund support for schools. In reality, there was **no** increase in total state funding for schools; because as lottery monies went to schools an identical amount of general fund money for schools was re-directed to other

state departments (primarily corrections, when the number of state prisons increased from eight to 37). Local school millages often failed because the public believed schools enjoyed a windfall from the lottery and didn't need as much local revenue. Local school officials tried to explain what was actually happening, and repeatedly called on state officials to confirm it to the public. However, over 10 years elapsed before any state official would publicly confirm the public's mis-perception.

* PA 5 (1982), the Truth-in-Taxation Act. As the Headlee amendment prevented schools from receiving increases **in excess** of the Consumer Price Index, the Truth-in-Taxation act prevented schools from receiving even the CPI amount of increase **unless** they went through a public notice and hearing process (Week 1: notice of hearing; Week 2: public hearing, and; Week 3: public setting of the millage rate) to justify their need for the CPI increase. Failing that, the district was limited to collecting only the previous year's actual dollar limit and, from that amount, absorb the effects of inflation, . This legislation passed during the severe Michigan recession, the annual inflation rate was 13-14%, the state income tax was being raised, and some legislators privately conceded that Truth-in-Taxation was meant to deflect to the local schools some of the 'public heat' being felt by the legislature over taxes.

* PA 110 (1985) established the first financial incentives for local districts to adopt curriculum reforms. It provided $28 per pupil for course offerings and graduation requirements and $8.35 per pupil for K-3 class ratios under 1:25.

* PA 147 (1986) required the removal or containment of asbestos in public schools at considerable expense. Concern arose when school custodians with 30 years of exposure to boilers and crawl spaces developed asbestos-related cancers. Another, lesser, expense was the requirement for lead-free plumbing in school buildings in PA 146 (1988).

* PA 171 (1989), the Computers of Tomorrow act, offered thousands of 'free' computers to local schools to be purchased by the state over five years. The 'fine print' required the locals to pick up the cost (out of their state aid) if the state reneged, but the public pressure on local districts to participate, was enormous. The state defaulted after the first year and the locals were forced to pay the final 80% (over four years). It was widely seen as a third-term re-election ploy of Gov. Blanchard. (He lost.)

* PA 99 (1992) and PA 68 (1993) require a criminal records check for new employees, which costs districts about $50 per submission and makes hiring conditional on the report received six weeks later.

* PA 335 (1993) was a comprehensive package of reforms with over 70 elements. Among those was the requirement to offer a breakfast program for eligible low income children, and all children if possible, at district expense. It required additional food service, clean-up and accounting services.

* PA 283 (1994) requires a progressive increase in school days and instruction hours over the next 15 years (.ie., from 180 days to 210 days by 2010) without additional state funding for this purpose.
It also introduced the 'blended count' (early October and the previous mid-February) for computing state aid; a provision which helps declining-enrollment districts and hurts fast-growing ones.

Background to Proposal A (1994)

Perhaps the most significant financial reform of all these was the change in the way Michigan public schools are funded. Senate Bill 1 of 1993 abolished the Bursley State Aid concept which had funded public schools for the past 21 years. When Michigan voters adopted Proposal A in the spring of 1994, they shifted the basis for funding public schools from an over-reliance on local property taxes and a below-average state income tax for a system which reduced individual property taxes and increased the state sales tax. This change concluded years of legislative gridlock and impotence over this issue; virtually every member of the Michigan legislature agreed that the former system was inequitable and needed changing - yet no reform plan could gain majority support. To appreciate just how revolutionary Proposal A was for Michigan school finance, it's helpful to briefly review the previous school funding mechanisms.

In the late 1960's the revenue sources for supporting public schools were almost evenly split between state and local taxes. Local property taxes produced 46.8% of revenues, and 47.7% came from a 4% state sales tax and various excise taxes. The remaining 5.5% of revenues came from federal funds which were usually earmarked for special education or other compensatory programs. From the 1960s through 1978,

schools received a basic amount of revenue for each pupil and for certain categoricals such as special education and transportation. Even then it was recognized that wealthy districts produced substantial revenues from **low** millage rates on high property values while poor districts levied much **higher** millage rates on low property values and yet collected **less** revenue per child. The result is another example of how the legislature operates in an idealized world and local districts must operate in the real world. Therefore districts were given the choice of two different formulas and they choose the one which was most beneficial for them.

In 1973 the legislature passed the Bursley Equal Yield State Aid Plan; whereby state aid was added to local millage revenue to produce a guaranteed minimum amount of money per pupil. The formula was based on a sliding scale; so that a community which voted a higher millage rate on local property was rewarded with increased state aid and an increased minimum guarantee. The underlying premise was that any community which taxed itself at a certain level (30 mills, for example) would have an identical amount of revenue to spend on each student in those communities. The difference in how much local revenue was raised by 30 mills in a poor district versus a rich district, was eliminated by adding enough state dollars in the poor community to make total per pupil revenues the same in both districts. While the concept was admirable, the formula never performed as planned because there was never enough state funding to fully implement it, and nothing prevented rich, education-conscious districts from taxing themselves at a millage rate which was beyond the ability of poor districts.

From 1978 through 1984 the state attempted to mitigate these differences by guaranteeing a basic per pupil amount for all students (front-loading) in addition to the millage rate 'reward' part of the formula.

In response to A Nation At Risk and other interest in state and local reform the legislature began, in 1984, to attach financial incentives for the achievement of specific reforms. Examples of this were incentives for graduation requirements, offering certain high school curriculum choices, maintaining a low pupil-teacher ratio in grades K through three, offering or expanding foreign language programs, etc. When incentives failed to produce local reforms quickly enough to satisfy the state it began, in 1990, to levy financial penalties on districts if they failed to institute certain reforms. Examples of these were a loss of five percent of total school revenues for the failure to issue annual reports, the failure to implement the strategic planning process, the failure of students to achieve certain MEAP scores, etc. In the most extreme cases the state could take a local district into receivership for its failure to implement state mandated reforms. At this point the entire Bursley concept was rescinded by the legislature and replaced by the mechanisms of the voter-approved Proposal A: six mills levied on all property (collected by the state), an additional 18 mills levied on non-homestead property and collected locally, and a 2-cents-per-dollar increase in the state sales tax. From these sources districts received a fixed amount of revenue for each pupil membership. The per-pupil gap between rich and poor districts ($4000+ in the first year of Proposal A) was designed to narrow each year by giving the poorer districts greater annual increases.

In this study, superintendents were asked several questions concerning the effect of financial reforms on the superintendent's role with finances and the actual financial operation of the district They reported multiple effects on each. Superintendents must be fiscally competent and responsible and they have to make Proposal A work in their district. This means complying with many additional requirements with greatly reduced funding. They must operate in an environment where they have less control, the state has more, and there's no predictability in budgeting. They have to negotiate benefits away from employees, yet maintain labor peace. And they have to explain all these ramifications to their school board and the public.

The operation of the district is affected by increasing the workload or staff in the central office. Incentives and penalties require the district to spend funds in specific ways - regardless of its own goals and objectives. Occasionally districts must spend on 'politically correct' issues (such as computers and criminal checks) of dubious educational worth. Districts are occasionally penalized by state accounting procedures, even as they attempt to comply with mandates. Required financial reports and public hearings use up resources with no discernable gain in trust or support. But, financial accountability is often used against districts by critics, and during millage campaigns.

There are only a few themes which emerge from the finance section concerning the effect on the superintendent's role. Perhaps this is because the superintendent's role regarding finance remains the same no matter what legislation or state aid formula is in effect. In smaller districts the superintendent is probably also the chief financial officer of the district. And even in larger districts that have a business manager/assistant

superintendent for finance, etc., it is still the superintendent who is ultimately responsible to the board and the community for the financial solvency of the district and the accuracy of financial information.

Four major themes emerge from the superintendents' responses: 1) Reform measures greatly affect the degree of control local districts have over their own operations; 2) The overall structure of the district is affected in that the day-to-day events of the district and its employees are interrupted by these reform measures; 3) Reform measures cause increased work for districts, but have little or no effect on citizens in the surrounding community; and, 4) Reforms such as Proposal A affect not only the financial structure of a district but also the public's perception of that system.

The first major theme to emerge from the analysis is that reform measures greatly affect the degree of control which local districts have over their operations. Many of the effects on district operations are a result of Proposal A and its consequences. Superintendents saw the shift from the old Bursley equal-yield state aid formula, with its heavy reliance on local property taxes, to Proposal A's almost total dependence on state funding - now tied to so many mandates - as a loss of local control and an increase in state control of local schools.

Breck (Farley) explained his perception of this state dependence: "I think the legislature sets the agenda, more than ever before. And certainly the funding mechanism is going to result in more and more of that. There is precious little local funding any more, with the recent changes in the foundation. And as a result I think we'll see more and more of a state-directed education, as opposed to local initiatives and local authority."

Eastman agreed but did note one positive: "We're going to get less from the city of Buffalo and from our five township treasurers and theoretically our state aid is going to be bigger. We're going to have less control over it, but there may be a few more pennies coming to the Buffalo kids."

Wilson (Dumont) discussed the drastic change in funding sources: "Where local districts across the state of Michigan, prior to Proposal A, had about a 50-50 blend of local property taxes and state aid ... today in the state of Michigan most schools have about 90% of their revenue coming from the state, and only 10% coming from local sources. That's important because now, basically, we're at the mercy of the state. The concern being ... what happens in a difficult year when revenues aren't coming in at the state level?"

A number of reforms forced districts to spend their revenues on issues which, for a variety of reasons, became the politically correct thing to do. Many have nothing to do with education or concern things districts were already quietly doing - but were publicly seized by politicians. Examples:

*Asbestos removal. There was public hysteria when custodians working in the same building for 30 to 40 years (in boiler rooms and above ceilings) developed symptoms of lung cancer due to exposure to friable asbestos. (Asbestos is a mineral whose molecules line up in a strand. When inhaled the strand can embed itself in the mucus lining of the lung and fester.) The probability that a student who spends perhaps three to six years in a school building (and not among the pipes or boilers) would develop lung cancer, is low. Nevertheless federal and state

governments mandated the removal or containment of all asbestos in schools. Daley (Vernon Hills) questioned the real necessity of asbestos removal: "We weren't sure if the law was right or appropriate, and quite frankly I don't think it was right because I think we **disturbed** more asbestos than if we had left it alone. But we asked the community in a millage issue to get the asbestos out of our buildings. To get the inspections, which are expensive, and then to get that asbestos that should be removed. And it was successful. I think it was a boondoggle for a lot of commercial outfits, quite frankly, and so forth. But that's how we addressed it. It cost money, and it cost a lot of it."

*Another mandate was the required breakfast program for low income students. Winer (Van Horne) explained how this, too, was an additional expense: "We had to restructure our food service, for example. We did have to hire an extra person to come in the morning. And then of course there's the clean-up afterwards. So we bring our crews in a little bit earlier. So that's increased expenses a little bit."

*Another issue was computers. Districts had been buying computers as they could afford them. But a governor and legislators facing re-election [in 1990] politically coerced most districts to purchase 'free' computers - which ended up with districts paying the final 80% of the cost. Halder (Braymer) discussed the program: "I guess we had to admit that there is no 'free lunch,' and this gift package that we were accepting may come with some strings ... although we didn't want to admit it

at the time. And the first year [which the state funded] was wonderful. However then we realized that we were going to have to pay for it. I think we're now in the fifth year - maybe this is the last year of payment - and we'll get out from under that. It was a carrot that was hanging out there - that we're still paying for." Breck (Farley) agreed: "We **just** finished paying off the computers. What a **bogus** operation that was. We're still paying for those computers that the legislature promised us free years ago. So it's their skeleton ... the ghost of the Blanchard era that's still around."

*Another mandate is the annual report. There's no question that districts have to incur the costs of producing an annual report; the penalty for failure is a loss of 5% of all state aid. Seymour (Forest City) mentioned how reality sets in regarding the annual report: "In the early years some districts felt intimidated by this potential penalty, and went to great expense to issue annual reports - until they realized that most members of the public don't care. One year we did a really slick little brochure thing, and it cost us about $8,000. Now we use a piece of paper."

Superintendents recognized that, under Proposal A, not only has the state become the major source of funding but will exercise more control over local schools as the price of that funding. This is the reverse side of the comments about the loss of local control, as noted by Breck (Farley): "I think the legislature sets the agenda, more than ever before. And certainly the funding mechanism is going to result in more and more of that. And as a result I think we'll see more and more of a state-directed education as opposed to local

initiatives and local authority."

Bowman (Landcaster) agreed that local control has been decreased: "I think the most significant factor in the last few years is how we are funded. And the fact that we are now a state-funded school system - regardless of what you name it ... whoever has the gold has the power. And we have very little ability to control how much money we receive as an individual district. We are only responsible, in essence, for controlling how much we spend."

Wilson (Dumont) noted how this state control has affected superintendents personally: "Certainly the state has an influence on what we, as superintendents, do in school districts. And it's had a **dramatic** impact ... and one way they can impact what you do, or how you look at an issue ... is by how they **finance** an issue. When they prioritize a need and put dollars behind it - as superintendents, that becomes a high priority for you. For one thing, they've identified it; for another, they've financed it. But certainly they have an impact and they do direct, to some degree, our thoughts on education."

So the first major finding concerning finance is that reform measures **have** greatly affected the degree of control which districts now have over their operations. Reforms often force districts to spend their revenues in response to the state's idealized view of schools rather than for any real financial or educational gain. Under Proposal A, not only has the state become the major source of funding, but has used the new system as the vehicle to advance the state's agenda and exercise more control over local districts.

The second theme to emerge from the analysis is that the overall structure of the district is affected in that the day-to-day events of the district and its employees are

interrupted by these reform measures. An operational effect of the financial reforms that superintendents discussed was the increased workload on the central office staff, particularly in smaller districts that lacked much staff. Hill (De Soto) explained how this effect was demonstrated in regard to his budget: "All this financial data that's broken down by building that has caused us to completely renovate our budget. Our budget here now is probably twice the size, twice the number of pages and twice the number of line items that it was a few years ago. It took a tremendous amount of time. I don't think anyone was thinking about - or probably no one has asked - how much time it took our business office to gather that information."

Steel (Washington Crossing) agreed that the financial issues in a district have increased not only the workload of employees but the number of employees needed to complete that workload: "Perhaps the superintendent at one time could be the bookkeeper, and could handle the books, and could run the school district. Now, you not only need a bookkeeper or an assistant superintendent for finances; you need someone who is director of curriculum. I think the number of responsibilities has increased to such an extent and the expertise you need in all of those areas - that it's impossible for one person or two people."

Montrose (Lowden) had to make personnel cuts for financial reasons while coping with the increased workload: "There's no question I'm losing control of my agenda and my priorities, because making things happen is work you do with people. And over the last several years, what I've lost ... and it's been a combination of financial pressures ... in terms of cutting back on a couple of administrators who were ... we had more help to

meet the increased demands."

Superintendents discussed ironic situations where, in the course of carrying out many state reforms, local districts are penalized by accounting procedures implemented by the state. Examples are:

*The blended count for pupil memberships. Stewart questioned the fairness of the blended count: "Rockwell is a growing district ... always hurt by the blended count. It doesn't make any sense to a reasonably thinking logical person. Where you cannot use the dollars on the current kids you have. The current count is the way it should be. To go to a prior year count costs us literally over a million dollars. Why didn't they just leave it as a flat current year count rather than what they did unless they didn't have the monies to fund public education to begin with?"

*Vocational education. Districts are encouraged to offer vocational opportunities for students. In rural areas, these are often at ISDs or other districts a great distance away. But in creating the opportunity for students, locals are penalized by the state for the minutes the students spend riding the bus to the other school. Van Horne (Winer) is one such rural area: "We're a poor district and we need to go to the career center to expose our kids to technology, and the latest way to tune cars, and all that sort of stuff. That's a half-hour trip, one way. On the ride home, I'm losing time on kids. It's a 'catch 22.' I can put a certified teacher on the bus, [but] what I've picked up, gained back in state aid - I've now paid the

teacher. I didn't come out ahead at all, so our kids are being penalized a half-hour from the career center ... but at the same time I don't have the money to invest in the career center stuff."

*Schools of choice. The state has encouraged districts to allow students to move freely to attend other districts. But the state only pays the foundation associated with the poorer of the two districts - regardless of where the children are actually educated. Winer explained how Van Horne is again the victim of financial discrimination: "We'll take an Ross kid - where they're getting $5,000 per pupil - and I'm getting $4,700. [Ross receives $300 for simply allowing the student to pass through their system on paper and attend Van Horne].

*Districts are required to do criminal background checks on teacher applicants. Wilson (Dumont) questioned the importance of this requirement: "I think the question becomes: Are they worth the cost? All those items carry a price tag and the question becomes: Could you spend those dollars more effectively to serve students in a different way? ... are we getting the payback for the dollars invested in the program?"

Superintendents felt that the annual state aid increases of one to three percent under Proposal A and the required increase in work hours and days would certainly affect negotiations with employee groups accustomed to six to nine percent raises under the

previous state aid/local millage system. However they differed on what that effect might be.

Buth (Clear Lake) felt he was able to communicate successfully with his employee groups: "I mean we basically said, 'You get no raise because we don't have any money and no future of it. No way of ever getting the money. So if you want raises we need more production. And besides we've got to add more days to the school year anyway by legislation. So, for every day you add you get whatever that translates to a percentage raise and that's it. More production for wages.' And that really worked out well for us. The union understood that."

Hunsberger (Clayton) also saw the possibility of smoother negotiations for management: "I think it's going to make negotiations with our labor groups a lot easier because there isn't this perceived barrel of money that we always seem to have. They are going to know now that we are going to get, you know, two percent or three percent or whatever we get from the state. That's it and that's all the money we are going to be having to be able to deal with. So, I think it's going to make negotiations an easier task for all of us administratively."

Superintendents from wealthy districts, which will face restraints under Proposal A, were especially aware of the need to exercise care in their future negotiations and spending. McKenzie (Greenfield) explained what Proposal A meant to his district: "Because essentially what [A] said was: 'You'll get a little bit of an increase every year. It won't be the same as inflation but that if you manage yourself carefully you should be able

to stay in pretty good shape for the foreseeable future.'"

Whereas former out-of-formula districts relied on local millage rates for revenue, Proposal A funding is totally tied to student memberships. It has the effect of making all Michigan districts in-formula. Duffy (Northridge) discussed how this affected her district's operation: "That changed us because now we have to pay attention ... see, in the past we were out of formula. We only had a certain amount of money anyway. It didn't matter if we had 9,000 kids, 8,000 kids, 10,000 kids. We had a certain amount of money. Now, our money is dependent on which bodies are here. So now, operationally, we have to be much more concerned about our fourth Friday [membership count] and so on. So, yes, operationally that's changed us."

Lamb (Glastonbury): "And what's going to happen to us - and what we saw this year was ... and it's not pleasant to contemplate ... is they are going to hold us back to the cost of living, or less, while they catch the others up."

Walls (Ottawa) worried about the restrictions of Proposal A: "Well it caused us sort of to ... the word isn't 'panic,' but it caught our attention for sure. Because we knew that the Proposal really was going to restrict the amount of money that can go into the schools, and restrict the local option for money to go into the schools. And that we would, therefore, be restricted. ... it almost immobilized us for a while ... so Proposal A, now, has not had a negative impact except how we view what we can do, because we think there's not going to be money later on."

In contrast to the above responses, superintendents from districts which had low per pupil revenue before the passage of Proposal A, responded that the measure did 'raise

up' low-revenue districts like theirs. This is the one instance among all finance reforms - perhaps among all reforms in general - where superintendents clearly divided on the answer to the question of Proposal A's effect on the operation of their district. The reason is obvious. Proposal A was enacted because there was a wide gap in per-pupil revenue between wealthy and poor districts. And while the gap may eventually close in 20 years or so, it is still most evident in these early years after its passage. This is another example of legislation enacted for an idealized world, which then fails to work at the local (real) level.

Winer said: "It helped Van Horne out. Not a great deal; but it is helping us out. I'm able to replace some things that have been let go for a number of years. So it has helped us a little bit."

Paquette agreed: "It was great for Grand View Schools. We were in-formula. Out of 500 and some districts, we were ranked about 500th - 490th."

Hill (De Soto) also saw benefits from Proposal A: "Well, Proposal A helped us a bit because we were one of the poorer districts. So, last year we got a catch-up. We got a little more funding. We got, golly, 5.5%, 5.6%, something like that. And we are getting another little boost this year, but then we will be up over the $5,000 mark and so I'm not sure what's going to happen ..."

Proposal A was also beneficial for Lowden Schools. Montrose said: "Well, initially Proposal A - we were one of the districts that benefited. So, for that first year we got a nice little shot in the arm ... Proposal A is a **positive** for Lowden, because under the old system we weren't going to be getting any more millage. So, I like Proposal A."

Therefore, the second major finding concerning finance is that employees work is often disrupted, and day-to-day events in the district are affected by reform measures. The workload of the central office staff may be increased, particularly in smaller districts that can ill afford additional employees. Ironically, districts are sometimes penalized financially while trying to implement reforms because compliance with one provision violates another . Superintendents felt that the financial restrictions of Proposal A would affect employee negotiations, but the effect is yet unclear. Wealthy districts face a future of restraint under Proposal A while poor districts have generally experienced some gain. In future years, all districts must view finances as if they were 'in-formula.'

The third major theme to emerge from the analysis is that reform measures have caused increased work for districts, but have had little or no effect on the citizens in the surrounding community. Significantly, however, superintendents don't think that trust can be legislated or enhanced by any of the reforms designed to promote more financial openness and accountability, such as the Truth-in-Taxation law, public budget hearings and the financial data in the annual report. This finding closely parallels the failure of communications reforms which had the same objective. Breck (Farley) doesn't believe that these reforms have affected community trust one way or another: "I don't think that those initiatives have fostered more trust. I think there's either trust or distrust in a local district based upon the history of the district and how it's handled its finances." Daley (Vernon Hills) agreed: "I think, you know, either the districts or the people do, or don't, trust the financial management." Speaking of hearings, McKenzie (Greenfield) said, "If the credibility is there, people are comfortable with you: and if it's not, they're not going

to show up whether it's in the paper or not."

Many superintendents remarked that financial mandates require them to publish more documents and hold more hearings - with no apparent gain or effect from those activities. Daley (Vernon Hills) observed that additional hearings and documents have no effect either: "Nobody shows up ... literally nobody ... at our Truth-in-Taxation hearings. Absolutely nobody. We publish our annual financial report in the local papers that are designated by the board at their annual meeting. And nobody ever calls on those. No one. I don't know if anybody ever reads them, or anything like that."

Hunsberger (Clayton): Publishing a financial statement [or] having a budget hearing which, at best - unless you're into something really controversial - if you have more than six people, you're lucky. I think we are going through the motions of something that in reality doesn't mean a lot."

Garrison (East Burlington), too, sees little reaction from the community: "Based on the experience in 12 years here - 12 open budget hearings - I don't believe we have had 10 citizens come in 12 years. I have never had a phone call about the annual report that we publish in the newspaper. Now, does that mean they aren't read? I don't know. But that's just a reality. It's a big year if we have one citizen appear at a budget hearing."

Despite the lack of public interest in financial reports and budget hearings in normal times, superintendents report a different situation when citizens are critical or when the district asks for a bond or millage election. Giammarco (Oswego) said: "I'll tell you when they look at that stuff. When they are mad at you and they want to find something wrong. I just don't think that the general public ... either they don't understand

it or they don't care. Unless they want to find something wrong."

Hill (De Soto) expressed dismay about how ignorant the public can be about district finances: "I don't think the regulations have resulted in a more informed electorate or community. When you get into a situation where you have to ask for a millage, or you have to ask for a bond issue or some financial issue that arises. Then you learn exactly how little people actually do know about some very fundamental parts of school finance."

Montrose (Lowden) doesn't feel the financial information reforms have been successful : Our business manager does all the preparation and gets all his charts and information - and no one comes. We open public hearings and close a couple minutes later. It is frustrating. And yet, you know as well as I do, that we have all those people out there who are going to throw all those barbs about wasting money and so on. Those reforms, if they were intended to truly inform the public, they haven't accomplished anything."

The third finding concerning finance is that reform measures have had little or no apparent effect on the citizens in the school districts. They have not affected public trust because it cannot be legislated - it is earned and conferred locally. Districts are required to hold more hearings and publish more documents, but citizens show little interest in these - except perhaps as sources for criticism during bond or millage elections.

The fourth major theme to emerge from the analysis is that reforms such as Proposal A affect not only the financial structure of a district but also the public's perception of that system. One of the elements of the superintendent's role is that, over and above their concern for their own district, they be ethically concerned about what is

best for all children and all districts. The effect of Proposal A on a particular district depended largely on the economic position of that district under the old state aid system. Wealthy districts were now somewhat restrained by Proposal A, poor districts received substantial gains, and districts at the in-/out-of-formula breakpoint were helped slightly. It would be understandable to expect superintendents' perspectives to be influenced by how Proposal A treated their district. Yet superintendents representing the entire range of districts were near unanimous in their support of the equity aspects of the reform.

Garrison (East Burlington) said: "Well, very frankly from a selfish point of view ... it would have been fat city for us if we were still using the property tax. Now, from a standpoint of equity, clearly the gap would have widened [without Proposal A]."

McKenzie (Greenfield): "Essentially what [Proposal A] said was: ... if we all live long enough, other people will be brought up and the gap will be closed."

Lamb (Glastonbury) recognized the fairness of Proposal A: "First, philosophically, as a policy-maker ... the intent of Proposal A, of equal opportunity for everybody, equal money - makes sense to me. And I have to support that."

Walter (Spruce) was also supportive of the results of Proposal A: "I think **statewide**, as a matter of public policy, that it was a very good move. The sales tax increase was long overdue. Everybody pays that. We've lessened our reliance on the property tax. More people are paying into the system. Statewide, I think it was very positive."

Superintendents lamented the unpredictability of budgeting under Proposal A. Whereas the Bursley state aid formula was based on property taxes - a very stable basis -

and some matching state aid, Proposal A relies heavily on state sales tax and hence the Michigan economy. This has increased superintendents' concern about the ability to plan budgets with any predictability. Geyer (Griswold) worried about the dollars being there in the future: "The thing that's bothersome to me is the lack of predictability in terms of funding. You know, we could probably 'do' with any funding formula, as long as you could see out a year. I don't think that's too far to ask ... that with some security, that these would be the dollars you'd have to work with. And you wouldn't always have that knot in your stomach that someone's going to come along and club the feet out from underneath you ..."

The longevity of Proposal A was another concern. Davidson (Justice) said: "My only concern is that I don't think it's going to last. I think the thing is so under-funded that the crisis is ... it's just a matter of when, not if. Of course, that's a typical superintendent reaction. But I think the evidence might point toward that reaction."

Wilson (Dumont) also expressed doubt that the state could deliver on the promised increases: "... today in the state of Michigan most schools have about 90% of their revenue coming from the state, and only 10% coming from local sources. That's important because now, basically, we're at the mercy of the state. And what concerns us is ... last year - the first year of Proposal A - we had a very hot, booming economy, and the average increase in state aid was 3.1%. The concern being ... what happens in a difficult year when the revenues aren't coming in at the state level?"

Superintendents felt that many citizens misunderstood how Proposal A would work and what it would accomplish. And to that extent people may have felt that the

local superintendents had misled district voters; a trust issue. Giammarco (Oswego) discussed the public misperceptions: "I think the problem is most people didn't understand what they were voting for. So now when we still go back for the 18 mills [on non-residential property, which must be renewed periodically] people say 'Well, I thought you weren't going to need millage?' It's like they made us look dishonest, and that's troublesome."

Eastman related his effort to educate local voters: "We advised people in Buffalo, before they voted, that it was a tax shift. That there was probably an overly-heavy reliance on property tax in this state ... that we were paying more in property tax in Michigan than most states did, and we were paying a lower sales tax than most states paid. And so it was probably an appropriate shift. ... and yet the real position was: It's not going to really change much for the Buffalo schools. ... but for all intents and purposes, it was a whole lot of bluster that was not going to fix the primary inequities in education in this state."

Many superintendents had mixed feelings about (even worthy) reforms tied to incentives. Often the cost of funding a reform, and the additional incentive received, were a financial 'wash'; the districts implemented the reform simply to avoid the political consequences of not implementing it. Daley (Vernon Hills) explained his district's response: "We had to do a little bit [of hiring] on the K-3 class size. Those were very difficult days financially, and our class sizes were higher. So we hired a few teachers to reduce class size."

Winer (Van Horne): "We'll listen to Lansing and we'll try to meet their demands. And we'll fall in line so that we don't lose funding and be sure to get incentives A, B, C, and D."

Like Winer, Stewart (Rockwell) had to find ways to satisfy the state's mandates: "[We] have difficulty finding the revenues and the monies to do it - to carry the job out ... you have to find ways to allocate dollars to meet all the demands that you want to be able to meet and know you can't, and to find creative ways to get the job done, I think that really taxes one."

Walls (Ottawa) recalled an incident which revealed how shallow parent loyalty might be in hard times: "I had a really sobering experience about five years ago. I said 'You know, if we really were restricted and let's just say we couldn't offer so many advanced placement courses, and we couldn't have art, music and P.E. at the elementary level. What do you think parents would do?' [Parents] said: 'They would be out of here in a minute. They would go buy it [commercially or in another district]. They would get it somewhere. They would not have any problem with that.'"

This is how superintendents felt about the financial reforms. Proposal A was the most significant reform. It helped poor districts and forced all districts, particularly wealthy ones, to manage their spending carefully. Regardless of how it affected their own districts, they supported its equitable objectives. And they think much of the public misunderstood its consequences. Superintendents believe 'A' means a loss of local control and increased state control, that it will affect negotiations and make budgeting unpredictable. They believe that other reforms have increased the central office workload,

influenced expenditures through incentives and penalties, and even punished compliant districts through picayune accounting procedures. They think financial openness, for all its effort and expense, has had little effect on the level of public information, trust or support. But it is a useful tool for critics and opponents. The irony is that there is suspicion at several levels: the way the legislature views the schools, the way the schools view the legislature, and the way the public views them both.

Personnel Reforms

Again, the researcher's purpose in the study was to determine the effect of state school reforms on the role of the superintendent and the organizational structure and operation of the local district. The researcher postulated that state actions have changed the role of the superintendent and the structure of the local district. The focus of the study was a series of 208 individual school reform measures enacted by the Michigan legislature or mandated by the governor, state superintendent or state department of education between the years of 1969 and 1994. Twenty-two of those reforms dealt with various aspects of personnel reform including specific mandates to hire personnel such as special education and substitute teachers; mandates to inform employees of such things as hazardous chemicals in the workplace, the contents of personnel files, enhanced benefits and revised probation and tenure requirements; teacher and administrator certification requirements, criminal records and employee drug testing; mandated increases in staff

development and instruction in such things as blood born pathogens, AIDS awareness and prohibiting sexual harassment in the workplace.

Some of the 22 reforms concerning personnel were of limited scope, but superintendents specifically discussed the following measures as ones that significantly affected them or their districts.

Chart 4-3: Personnel Reforms Frequently Cited by Superintendents

* PA 397 (1977) permitted employees to know, review, and copy information in their personnel files.

* PA 451 (1977) Significantly lowered the allowable caseloads of special education teachers in several disability categories. This required the employment of many more teachers just to serve the same special education population. The Michigan caseload limits were lower than the Federal requirements of that time; the U.S. adopted the Michigan standards two years later.

* PA 80 (1986) required school districts to inform employees of hazardous chemicals in the workplace. In the same year, PA 147 (discussed earlier) required the same warnings about asbestos.

* PA 72 (1986) required that substitute teachers employed for 120 or more days in a single school year may immediately, and for the following school year, claim any vacant full time teaching position for which they are certified. This permitted substitute teachers, who are usually employed because of their ready availability and proximity, to obtain a teaching position without going through a district's normal screening and interviewing process to select the best candidate. This legislation, heavily promoted by the MEA, required districts to keep detailed records on the annual use of every substitute.

* PA 163 (1986) established the process for the initial state certification, and the educational requirement for five-year renewals, of school administrators. Companion legislation for periodic recertification of veteran teachers was defeated - again with heavy MEA pressure. In the years since 1986, administrator certification has been switched from mandatory to optional three times, although certificates are still issued by the state.

* PA 267 (1986) did require **new** teachers to pass basic skills and subject-area exams to become certified - effective in 1991.

* PA 503 (1988) permitted teachers to nullify subject-area certifications which they had previously earned. Again with strong MEA backing, it protected teachers from being assigned to subjects they had not taught for many years, or ever. For districts, it somewhat limited the flexibility of administrators to make teacher assignments.

*PA 193 and 194 (1989) encouraged widespread school employee retirements by providing 90% of health benefits, paid by the state, and an employee-paid enhanced pension which increases by 3% annually. It was characterized as a school reform measure because it would provide a painless way to remove thousands of ineffective teachers and administrators from the public schools. In retrospect, it may have worked too well - also retiring many highly-effective employees.

* PA 25 (1990) and PA 335 (1993) required districts to train employees to serve on site-based decision-making and strategic planning committees. These two pieces of legislation, with over 75 separate provisions, were responsible for a substantial increase in central office workload and the hiring of additional administrative staff.

* PA 99 (1992) required a criminal records check of newly-hired employees.

* PA 59 (1993) extended new-teacher probationary periods from two to four years, required individual teacher development plans and mentors, and 15 days of annual inservice.

Many reforms simply required the hiring of additional personnel to achieve compliance. For example, a number of mandatory special education laws lowered the number of students that special education teachers could serve on their caseload. This meant that for any fixed number of special education students, more teachers were required under the new reforms than under the previous rules. When the rules allowed 25 students on each teacher's caseload, 500 special education students would require 20 special education teachers. When new laws such as PA 451 (1977) lowered the caseload limit to 18 students per teacher, 28 teachers were now needed to teach the same 500 students. When the caseloads were further dropped to 10 students per teacher, a district

would need 50 special education teachers to serve the same 500 students. These mandates began with Public Act 451 of 1977 and were amended several times later. Public Act 72 of 1986 required districts to immediately hire any substitute teachers who had worked more than 10 days in a given school year. This meant that substitute teachers, whose major attribute may have been their local availability as substitutes, now received jobs without going through the elaborate screening, interviewing and hiring process that most districts have established.

In some instances, mandates required districts to perform functions for which no current employee was certified, trained or capable. Preparing annual reports, managing at-risk students and mainstreaming special education students from specialized center programs back to their home classrooms: all are examples in which school districts needed new skills and attitudes which were not possessed by any current employee. In districts which had severe financial constraints, the hardship of the reforms may have precluded hiring additional employees, but rather loading all of the new work required by mandates on existing employees - who already had full time responsibilities.

Four major themes emerged from the analysis: 1) State reforms have affected the behavioral climate in that employees must accept change and transform themselves; 2) Reforms have caused districts to hire new employees that meet the requirements of this 'transformation' type person; 3) In addition to new hires, these reforms have significantly increased the workload of existing employees, especially central office staff; and 4) Management of personnel is the hardest task that superintendents have to perform.

The first major theme concerning personnel to emerge from the analysis is that state reforms have affected the behavioral climate of the local district in that the employees **must** accept change and be willing to transform themselves. Superintendents believe that state mandates have required behavioral changes by employees at a faster rate than people are prone to change; and it is now part of the superintendent' role to manage this conflict. Many of the state reforms have included timetables or deadlines which are quite short in comparison to the normal response times of individuals and groups to change behavior. And the failure to respond to the state by the set deadline can result in financial penalties or other sanctions. It has now become part of the superintendent's role to change employee attitudes and behaviors within the timelines set by state mandates.

Buth (Clear Lake) explained some of the changes that need to occur: "That's a very difficult thing to do. Because people don't change easily and they found something that works. Techniques in the classroom. These are good teachers, by the way, been excellent for years. And now we are asking them to take on more and do things differently. Now it's technology. I've got teachers that are afraid to turn a computer on and I'm spending $5 million to upgrade all the technology in the district and I've got teachers who are scared to death of it. ... technology has changed so rapidly and human beings change so slowly. The gap is horrendous. So, we are going to buy the hardware, but we're going to spend a lot of money on the human aspect, too."

Part of the problem is the resistance of employees, especially veterans, to accept the fact that reform pressures are real and to accept the training being offered by districts. Duffy (Northridge) expressed the frustration of trying to change the old ways of her

employees: We would like to lobotomize most of them. We're constantly trying to teach old dogs new tricks. And you know how that goes. ... there were people who were standing at the same pop stand selling the same stuff that they sold 30 years ago when the consumers were very different. And we've tried so many ways to make these little, you know, inside-out changes and just don't have time for that anymore. We have to make a formal frontal assault on some of our folks and say, 'Here's how we need to do business around here.'"

Paquette (Grand View) cited some of his programs to effect change: "We've done team-building and training. We've changed even our bargaining process to a collaborative process. We train our teams in that process. Team-building workshops for all our school-improvement teams. Collaborative decision-making process. [We are] about 90% successful, 10% not. You're always going to have some people who move a lot slower ... questioning it."

Griswold has not been as successful. Geyer: "Well we really haven't succeeded very well in that. We have held out some carrots for them, in terms of opportunities for training ... opportunities to do things with kids, on and off campus. We have not been successful ..."

Lamb (Glastonbury): "We had to keep hammering that notion at people; change is going to be here. You know, it's like a train. You have a choice: get on, or get out of the way. Because it's coming and it's not going to relent. [We] constantly make it clear that we're seeking continual improvement around here - and that resting on your laurels ... the status quo ... won't get it."

So Glastonbury employees, like those everywhere, **must** accept change. Many superintendents feel that the solution is to find more time and resources for employee inservice experiences. They cite a number of successful programs that show promise. Walls (Ottawa) noted the new requirements in his district: "I mean, technology is now the big thing, so we provide lots of seminars for people to get involved with technology. ...so I think what we do is provide the opportunities for growth among staff members."

Walter (Spruce) believes they must: "... do a better job of professional staff development. Two or three days a year isn't going to get it done. We had some summer academies this summer ... summer institutes for teachers in August. We had one on mastery learning. One on reality therapy. ... but I think we need to find ways to do a better job with professional development, because if you can't move the people out of your system you've got to find some way for them to be retrained. Because a lot has changed with these people who have been out [of college] for 25 years. A lot."

Davidson (Justice) stressed the importance of training and development: "We keep training them and we keep training them and we keep training them. We send them to conferences on average of 20 days a year. And that does two things. One, it revitalizes their personal spirit because they can get out and they are professionals. And two, they get the training and it works. And I am committed to staff development. Otherwise you can leave them in the classroom and let them burn out and do a bad job. And you're not serving the kids."

Other superintendents felt that it required something more than just more time on task. They saw the need to instill their staffs with a new philosophy of service to the educational customer - parents and students. Stewart described Rockwell's implementation: "We provide inservices on working with people and dealing with people. Our philosophy is constantly brought before the staffs, regarding the importance that we are a service organization. That we are here to serve the community, the people, the parents, the students, the 70% that do not have kids in school. ... and all of us that are associated and work with the public schools have got to be people-oriented and have got to be willing to meet the needs and go the distance in helping people to be successful."

Montrose explained Lowden's philosophy: "And our emphasis for the last four or five years has been cooperative teaching, team teaching and, of course, cooperative learning as it relates to the students. ... our theme is 'Every teacher is a counselor.' So all of our staff members have been through our own effective instruction program. Most of them have been through our student assistance program." There's another side to this philosophy, as well: "Now kind of a variation of that is the 'conflict resolution.' And we put non-teachers through our - what we call our EIP program. And it's all emphasis on relationship with kids and teamwork together. Now, not everybody responds the same to it. But that's really been an emphasis on our whole approach to work together."

Unfortunately, sometimes staff are unable or unwilling to change, or change fast enough to meet the state's requirements. It then becomes part of the superintendent's role to guide these veteran staff members into retirement for the greater good of the students and district. Buth (Clear Lake) said: "I don't want to lose good older teachers because of

their fear of the changes so rapidly. And that's happening. People are saying, 'You know, I love teaching; I just can't do it anymore.'"

Hill (De Soto): "What we have offered them the opportunity for retraining. And we have also offered some of them the opportunity for retirement. And some have taken us up on retirement."

Lamb (Glastonbury) discussed the urgency for veteran teachers to change: "We've got old timers that don't see that. Don't believe that's their mission. 'I was hired to teach calculus ... I was hired to teach U.S. History'. They haven't bought into this idea that you're hired as a teacher of the whole person. And we're trying to get rid of those guys little by little. And they're retiring. I've had people quietly throw in the towel and announce their retirement. I know that it's only because they're looking around and saying, 'I don't fit. At one time I called a lot of shots around here ... about having to have standards and getting the bums out of here. But this movement the schools [now] have, to save everybody and make all of them succeed ... hells bells, that doesn't fit me. And I'm a voice crying in the wilderness.' They call us two weeks after school's out [in June] and say, 'By the way, I'm retiring.' [He whispered] and a silent cheer goes up."

Walter (from Spruce) sees the push for change from within: "Probably the greatest pressure or the greatest force, really is from within the school district itself. The school staff sees the need for change. And we've made a lot of changes in our district. And we've had a lot of personnel changes in this district because ... you know, we have a very lucrative early retirement incentive for people. And we bought a bunch of people out. [If someone] said, 'I need three years to retire. If someone will buy these three years,

I'm out of here.' We bought them, and they're gone. We brought in new people, and the new people coming in are a whole different breed."

So the first finding concerning personnel is that the reforms have affected the behavioral climate of the district in that employees must accept change and be willing to transform themselves. It involves a combination of changing philosophy, employee inservice and (unfortunately) sometimes retirement. In general, change is hardest for the more veteran employees.

The second major theme to emerge from the analysis is that state reforms have caused districts to hire new employees, and ones who meet the requirements of this 'transformation' type person. The sheer number of mandates and the additional labor required to comply with them, has directly caused the hiring of new types of employees or additional staff in existing categories. Farley was involved in this type of hiring. Breck: "I think that the hiring of the Director of Instructional Services was really a direct outcome of PA 25. I think there was such an overwhelming series of mandates that the district - which probably was at a point, size-wise, that they should have seriously considered a curriculum director - that became the straw that broke the proverbial camel's back. And so the response of the Farley district was to hire a curriculum director."

Daley (Vernon Hills) mentioned two specific examples: "We are going to hire, a week from today, Mrs. Penn from the Golden schools; and she is going to be our At-Risk Coordinator. To handle the at-risk requirements." And, concerning the K-3 pupil teacher ratio incentive: "We had to [hire] a little bit on the K-3 class size. Those were very difficult days financially, and our class sizes were higher. So we hired a few teachers to

reduce class size."

The problem, according to Barber (Clay) is the paperwork associated with reforms: "I probably would not have a full time special ed director if it wasn't for the myriad of paperwork. I mean, that guy, it's all he does."

Paquette (Grand View) also lamented the overload of paperwork: "We [now] have a full time language arts coordinator, and next year we're going to have a math and science coordinator. We didn't have those before. It's being driven by the collection of data, and the proficiency test, and keeping track of students and try to help ..."

Paquette also mentioned a greater use of volunteers because of reforms: "We've added volunteer coordinators; they are part time. When I came in the district we probably had very few volunteers. Now we have hundreds ... that do mentoring and tutoring. All being driven by the fact that MEAP is being monitored by the state and affects accreditation."

Additional support staff were sometimes required due to reforms. Winer (Van Horne), discussing his new breakfast program, said: "We've had to restructure our food services, for example. We did have to hire an extra person to come in, in the morning ... and then, of course, there's the clean up afterwards. So we had to bring our crews in a little bit earlier. So that's an increased expense ..."

The superintendent's challenge in changing the behavior and attitudes of veteran employees was discussed above. When districts have the opportunity to hire new certified and support staff, superintendents look for candidates with those preferred behaviors and attitudes. Giammarco (Oswego) described what she looks for when hiring new staff:

"We look for teachers who have had some background on school improvement. With the administrators, I hire a very different kind of administrator than I probably would [before] because I don't want to have to spend time training someone in the accreditation requirements and the school improvement requirements and all of those kinds of mandates. So we look for people who tend to have more experience in those things."

Briscoe (Parkway) agreed: "I **am** looking for people who can give the instructional strategies, who know the strategies to get at what I want done. ... we do look for different persons we want to hire. We do look at different directions."

Paquette (Grand View): "We're looking for a lot of team-based players. We mostly try to find that in our interview process. We even do some LSI testing to find people that score higher in collaboration."

Geyer (Griswold) said that he looks for people who seek and enjoy change: "Well certainly, I'm looking for people that are interested in being part of the change that is taking place in education, and eager to work within the idea that things are changing at a very rapid pace. And that they're adaptable ... you know, you're always looking for somebody that has good relationships, and a positive outlook on life. Who would really give kids the optimism and the good feelings about learning that you hope to get."

Hill (De Soto) described every open position as: "... a very valuable commodity. More so, I have to say, than I remember when I was hired. And more so than I remember 10 or 15 years ago when I began doing hiring. We are also looking for people who are multiply-skilled people, much more than I recall in the past. I think we are pickier, much more discerning." He discussed the differences in today's teachers: "I think that new

teachers are expected to be proficient in many more areas. ... now it is also important to be proficient in all sorts of instructional techniques that will be useful in the classroom. ... we want someone who can move right in and be successful."

Lamb (Glastonbury) expressed a detailed description of what he looks for: "We're looking for individuals that can convince us that they're happy with themselves, I think. You know, you can see that they like themselves ... a sense of mission about being an educator ... that's not starry-eyed ... but a sense that 'this is a tough damn business to be in.' If you're going to be a **good** teacher, do you realize all the things you're going to have coming at you? All the people that you're going to have to please? How difficult it's going to be to [serve] all these masters - including the state - which says 'We've got to mentor you and we've got to train you, and you're going to be trying to stay a page ahead of the kids and get your lessons done ... and you've got to get training and cooperative learning, and we want you to understand learning styles ... and continuing to keep it on. Are you ready for that?' And we're looking for people who seem to understand that. And are willing to step up and say, 'Yeah, I have a mission about this and I know what I'm getting into.'"

Walls (Ottawa) agreed with Lamb: "Well we here are looking for people who have the ability to facilitate things, as opposed to telling people how it ought to be done. And to work with , cooperatively, people and try to say yes more than no." Steel (Washington Crossing): "I am looking at staff members who give children a positive experience ... I think we have teachers who have the flexibility now to teach different subject matter."

Stewart (Rockwell) sees the importance of communication skills: "I know that our top priority is that we are a people business. Our greatest resource is our people. And we have to have individuals who **are** 'people' people. They, in fact, can communicate well with people whether they be students or adults. ... in fact, they have to be **skilled** at communicating and working with other people. That's a top priority."

Montrose (Lowden) had a different priority: "What we are looking for is probably ... attitude would be number one. The same thing we're telling kids. ... but the bottom line now would be much more of an emphasis on attitude than we had before - positive attitude, the ability to change, be a team player, team teaching."

And so, the second finding concerning personnel is that districts look for different skills and attitudes in applicants when they have the opportunity to hire; skills which will facilitate compliance with the reforms. While the desired skills may differ between districts, all are based on the ability of new employees to adapt to new ideas.

The third major theme to emerge from the analysis is that in addition to hiring new employees, superintendents recognize the effect that reforms have had in putting more work load on many district employees. Superintendents were asked who, if the district is unable to hire additional staff, does all the work associated with required mandates? Seymour (Forest City) said: "The administrators take most of the hit." Lamb (Glastonbury) explained: "We delegate out to the principals. I mean, it falls on their shoulders. And I think if you were looking for somebody whose plate really has been to overflowing ... it would be the building principals."

Stewart (Rockwell) agreed with Seymour: "I think the level of administrators and curriculum directors are dealing with most of those issues. I think the main weight or responsibility falls upon administrators. And they are the ones who have to communicate to the public some of the issues as well."

The inability to hire additional employees not only increases the workload of administrators; it falls on other employees at the building level. Halder (Braymer): "I would say of all the areas that are in jeopardy, and yet the area that requires the greatest amount of tracking, follow-up and particular attention is the personnel area. We have not been able to bring on additional personnel. ... we have attempted to have our individual building assume more of their site-based management opportunities. ... it's kind of like we pushed everything down, or some of these responsibilities down [to the building level]."

Daley (Vernon Hills) discussed the greater management requirements for substitutes [so they don't automatically become full time employees]: "And so we ask for records on that and try to keep that situation monitored. We did not hire anybody, it was just additional work [for existing employees], more record keeping."

Winer (Van Horne) represents the despair of many small, poor districts which have no option to hire additional personnel: "What frustrates my people here is that [the state is] asking for all this additional work. We don't have department heads ... you know there's only two people in the social studies department ... and you need all this stuff done. When are we going to have time to do it? And that's what frustrates our people."

Bowman (from Landcaster, another small district) agreed: "If you take the laws concerning such things as ADA, Right-to-Know, bus driver drug testing and on and on -

that impact our operation - is diverting already the limited amount of time of personnel in a multitude of different directions that makes it much more complex in terms of management."

While compliance with reforms has increased the workload of current employees at many levels, superintendents feel the greatest effect has been on central office personnel. Breck (Farley) discussed this: "It's a lot of work. We're one of the [in-be]'tweener' districts that don't have a personnel director, and so it falls on my shoulders for the professional staff and on my assistant's shoulders for the support staff. So it's extra work in a district that doesn't have a personnel director, and that's obviously a personnel function."

Steel (Washington Crossing): The state asks us to process reforms ... it has to come from central office because we are held accountable."

Two of the more recent reforms significantly increased the workload of central office personnel. One required a state and federal criminal records check of all prospective employees, and the other required random drug testing of bus drivers. More than any other reforms, superintendents cited these measures as examples of legislation with a noble purpose, that might be politically popular, but which could also raise concern about children's safety. Breck (Farley) related the public perception of the schools as protectors of children: "I would suggest or submit that it's an assurance to the public at large that we're not going to hire individuals who are sex offenders or child abusers. And so from that standpoint I think it's good stuff." Daley (Vernon Hills): "As our society changes, as drugs become more involved, as there are more people who attack children or

hurt and abuse children and so forth, it's probably somewhat reassuring to [the public] I would think. ... it may be reassuring to those people. As you know, we're all very protective of our children. Particularly when they are young. Whether knowing that all bus drivers are going to have random tests for alcohol and drug abuse ... it may be reassuring to them." And Garrison (East Burlington) agreed with the safety issue: "I don't think that will necessarily provide us public credibility, but I think in the kind of society in which we live, those things were unfortunately necessary and I think should continue. ... I think it's a good personnel procedure now to check as carefully as you can on the people that you hire to come in contact with children."

But other superintendents felt that the criminal checks and drug screening would be either ineffective, or send the opposite message. Barber (Clay) said: "I don't think that random testing is going to make the public any more secure putting their kids on the bus." Buth (Clear Lake) described how these reforms can result in negative publicity: "I would say that it had the opposite effect, because once in a while you will uncover - and it seems more so today - a bad employee. And that hits the newspaper and all of a sudden that's translated to 'all the employees are bad or they have significant problem whether it be a drug problem or whatever.'" And Gresham (Tuscarora ISD) agreed: "I don't think it causes the public to have more confidence in employees. As a matter of fact it may have a reverse effect. Because if the suspicion is there and is brought to the public's attention, then it's a bigger problem than it was before."

The third finding about personnel is that, in additional to the need to hire new personnel, superintendents recognize the effect that reforms have had in putting more

workload on many existing personnel. It primarily falls heaviest on administrators at all levels, and on all central office employees.

The fourth major theme to emerge from the analysis is that when superintendents were asked what, among all the problems and work caused by school reforms, was the **hardest** thing they had to deal with - they cited the 'management of personnel.' Perhaps because public education is such a personnel-intensive activity, the failures of personnel weigh so heavily on superintendents. McKenzie (Greenfield) felt the first task is to convince the skeptics: "...it's the need to drive home to our staff, a highly-paid staff and a staff that should be extremely proud of being here. ... I think convincing people that the battle before us is going to require extra effort on all our parts. It's tough, ... but still there is a certain skepticism about why we really need to change."

Giammarco (Oswego): "I often feel like a conductor in an orchestra or band and ... my role is really a facilitator to make things happen by working with people and using other people. So, the key to me is getting all the pieces to work and play together. And that takes up most of my time."

Duffy (Northridge) expressed her difficulty in managing personnel: "The hardest part for me is managing the duplicity in this organization. It's the failure of people to be accountable. The unwillingness of people to step up, and own, and do. That's my biggest struggle here."

Seymour (Forest City) agreed: "Well, I think if I had to pick the one thing that frustrates me or gnaws at me most often it's ... well I will personalize it. It's my inability to get one or two employees to change. Because I absolutely think they should but

somehow either they can't or I can't get them to."

Finally, Lamb (Glastonbury) said:

> The hardest thing has always been trying to respond to the customer for the incompetency or misbehavior of somebody that works for you. And I've moved away from being an apologist, like I think we used to feel we had to be when I was a building principal. You know, 'stick up for them at all costs.' Now I'm less inclined to do that. I say, 'We'll get to bottom of it, but frankly, from what you've told me, that's not something I can defend until I hear something different.' ... I find myself still answering for people who do little. Who are hurtful to kids. I hate to have to do that.

This was the view of superintendents concerning personnel reforms. The reforms affected the role of the superintendent by requiring he or she to change the behavior and attitude of veteran staff, within set timelines, to avoid penalties. Reforms required them to look for different qualities in newly-hired employees. Districts were required to hire additional employees to cope with the requirements of compliance or, if unable to afford that, to increase the workload of existing employees. That workload falls on many existing employees, but heaviest on administrators and central office personnel. Finally, superintendents cite personnel management as the most difficult task they perform.

The finding that personnel mandates have caused few changes in the superintendent's role, appears to make sense. Regardless of the period of time or the existence of mandates, superintendents have always had the role responsibility to manage personnel, and to draw out from that personnel the performance and behaviors required by the times. However, there is arguably one new element in the superintendent's role concerning personnel which has been caused by state reforms. That deals with the need to transform veteran staff, who are too young to retire, to conform to reform requirements.

General Administration Reforms

Again, the researcher's purpose in the study was to determine the effect of state school reforms on the role of the superintendent and the organizational structure and operation of the local district. The researcher postulated that state actions have changed the role of the superintendent and the structure of the local district. The focus of the study was a series of 208 individual school reform measures enacted by the Michigan legislature or mandated by the Governor, state superintendent or state department of education between the years of 1969 and 1994. Thirty-nine of those reforms dealt with various aspects of general administration of the district including specific mandates concerning student and employee rights, immunization and health screening, safety issues, school calendar, student and employee record keeping, weapons in schools, corporal punishment, accountability and performance standards, diplomas, portfolios, dual credit, professional development, tenure changes, certification, criminal records checks, sexual harassment, breakfast programs, charter schools, consortia agreements, retirement, suspension and expulsion, and grade changes. Many of the 39 reforms dealt with single issues or were limited in scope, but superintendents discussed the following measures as those which significantly affected them or the operation of their districts.

Chart 4-4: General Administration Reforms Frequently Cited by Superintendents

*PA 147 (1986) and PA 51 (1993) required the containment or removal of asbestos from schools and then only under certain conditions.

*PA 128 (1987) required all 560 Michigan school districts to file an annual report on the amount of public funds spend on cars and/or chauffeurs for Board Members - a situation existing only in the Detroit district.

*PA 521 (1988) prohibited corporal punishment or discomfort of students under any circumstances. After the arrest of several teachers and athletic coaches the law was modified by PA 6 (1992).

*PA 335 (1993) required pupil performance standards, site-based decision-making, student portfolios, state-endorsed diplomas, additional MEAP testing, professional development processes, breakfast programs and consortia agreements.

*PA 59 (1993) requires individual development plans, mentor teachers and four-year probationary periods for new teachers.

*PA 362 (1993) permits the creation of charter schools under a wide variety of conditions.

*PA 283 (1994) requires a progressive annual increase in days and hours of pupil instruction until the year 2010.

Three major themes which emerged from the analysis are: 1) Superintendents see no continuity or plan to the manner in which state reforms are mandated; 2) State mandates have provoked the question of who really controls and directs the operation of the local district and whether the education of students is still the primary motivation behind that direction; and, 3) State mandates have ultimately affected the role of the superintendent, creating more work and dissatisfaction.

The first major theme to emerge from the analysis was that superintendents feel that state reforms are mandated without any apparent continuity or reference to an overall plan. Halder (Braymer) made reference to how reforms fluctuate with each legislative session: "I'm sensing so much that the pendulum tends to go all the way from one extreme to another before it reaches some semblance of order. Maybe it's the 'chaos

theory' - that out of this chaos will come some kind of order."

Hales (Cambridge) noted that it's not only a problem caused by the work of the legislature; a change of governors or state board members can produce the same shifts in policy:

> We can never, or rarely, get things on an even keel because the persons who are calling the influential shots for us are continuously changing. I think that's the biggest problem. If you look at our governor, the members of the state school board, our state superintendent and the more recently elected Clark Durant, and overnight a totally new agenda comes out of the state school board. I'm not saying necessarily that agenda is good or bad, it is just that it changed overnight because of one election. Lack of continuity, long-range planning.

Hunsberger (Clayton) discussed how disruptive this phenomenon is to the people in local schools who are trying to comply with mandates: "I mean we have been changing the course. Every year, every two years, we are changing the course. So, therefore, we're having to constantly shift gears and we have no continuity for neither the kids, nor for the teachers and principals and the other educational administrators, to be able to structure a program to meet an end result."

And Giammarco (Oswego) noted the irony that the state stresses accountability by local districts while passing reforms which lack both thought and measurement:

> My point is that the way these things are coming down as mandates are not thought through; they do not have goals in place, they don't have a method of measurement for any of that. All of the things we do and have been told to do - are not occurring at the state level. So, I do not think that any of these things, because of their haphazardness, will have an impact on what's happening in schools. Not at all.

Buth (Clear Lake) described the state's tendency to waffle on enforcing reforms: "Of course they change their mind all the time, too. Once they want you to change the

state's mandates so you just routinely do what they want you to do and then they say 'Oh no, these are only suggestions.' The next minute 'We don't want them as mandates.'"

Winer (Van Horne) discussed how the state's flip-flops send the wrong message to teachers: "Teachers are saying, 'Why do it? The state's only going to change it again.' And I think that's evident right now. They're talking about core curriculum ... 'Ok, we'll pull it back. And we think you should be doing these things ... but we're going to let you decide.' And they're [teachers] saying 'What did we tell you?'"

Lamb (Glastonbury) expressed the futility felt by many superintendents: "I've become fatalistic, I guess, about the fact that I know they're going to come at us, year after year, with 'change this, change that'. ... but, looking at the state board right now ... flying off in one direction ... totally in opposition to what the business community and the legislators have done, gives you a good example of what we have to deal with."

Walter (Spruce) said:

> We've been to the point with the legislature where we're trying to stay at least ... not one step ahead of them, because I don't think we can always ... but try to stay up with, you know, what they're planning to do. I think about stuff like the MEAP test and who are you going to test on MEAP. First they said you had to test all the limited English proficiency and special education students. And then they're saying you didn't have to. ... that kind of stuff. They've gone flip-flop. ... they definitely change the rules. And my response to that is pretty simple. That ... just tell me what the new rules are and we'll play by those rules. ... there's no sense in reminiscing or whining about what we should have or didn't happen, or what it was in the past. So I think there are new rules and we have to adjust to them.

And Bowman (Landcaster) said:

> The issue that is most disconcerting is the fact that those guidelines continue to change. And in so many ways you feel like you have wasted time and resources that are hard to re-garner that every other year, i.e., accreditation. There are many

> schools, including ourselves, that began to gear up for what was considered to be the accreditation standards of 1992-93, and suddenly they're jerked and we go in another direction. And staff feels like, 'Gee, why should we start again; we wasted our time once.'

So the first finding regarding general administration reforms is that superintendents see no continuity or planning behind many reforms. Many can't be measured for effectiveness. Any significant change among the major educational policy makers in Lansing almost certainly means a change - or reversal - of reforms. The frequent changes send the message to local districts that reforms are based more on politics than on educational improvement. Local compliance may become a matter of futility and resignation, rather than belief in and support of the reforms.

The second major theme to emerge from the analysis is that state mandates have provoked the question as to who really controls and directs the local district and whether the education of students is still the primary motivation behind that direction. Because of state mandates, superintendents express some doubt or confusion about who they really work for.

Sensing the restriction, Daley (Vernon Hills) said: "There are so many things that have to be answered and responded to. I don't know who I'm working for, though. I mean, the state is mandating these things and ... we're **so controlled** [that] by the time you get done negotiating with the unions and the state mandates and the state laws - there's very little flexibility allowed or available."

Hill (De Soto) agreed: "More and more, nearly every decision one would like to make as a superintendent is restricted by rules or parameters or regulations. ...coming

from the state department of education, some coming from legal requirements. ..." And so did Steel (Washington Crossing): "I think the demands are much more ... a lot of demands put on us. And it's by the state, I think. The demands are not local." And Walls (Ottawa) said, "I think we are more regulated, without question. And we have to always be responding to demands from the state to do things that we hadn't, in the past, been required to do ..."

Boards and superintendents differ in the degree to which they become resigned to the transfer of control. Winer (Van Horne) discussed his board's feeling of victimization: "They sense that Lansing is trying to jam stuff down our throats. They also sense ... that Lansing would like to **close** Van Horne. They have the feeling that ... they don't know what Beal City did to John Engler for him to be against small school districts; but some of the things that are coming down out of Lansing are putting us in a real crimp."

In contrast, Geyer (Griswold) and some other superintendents still express a sense of resistance to the growing state control: "I don't feel any compunction to be responsive to the state board, or the state legislature. ... we don't always feel compelled to live with the spirit of what they're doing ... unless it fits in with our mission ... "

Finally, Walter (Spruce) spoke the opinion of many superintendents: "The fight or the battle - if there was one - about local control ... has been **lost**. There is no local control. It's a joke. It's a friggin' joke ... the state is calling the shots. Rightly ... wrongly ... it doesn't matter what I think. We've **lost** the battle over local control."

Another point is that local districts must now take direction from state officials who do not understand education, do not understand the local consequences of sloppy

legislation, or who want to discredit public schools. McKenzie (Greenfield) said: "What annoys me is that I dislike having to deal with people who have no interest in us succeeding. ... now we're dealing with people who have no interest in improving the system. They're interested in destroying the system and creating something quite different, for whatever motives."

Giammarco (Oswego) talked about fighting a legislative bill that would've harmed her district - because legislators apparently could not foresee the educational consequence. "So now I have to go back, write letters to the legislators, send faxes, go to meetings, etc., in order to get the language changed again ... you don't know how much time and energy that has taken from what I should be doing here. And that is the rule, not the exception, today with what is happening at the state level."

Duffy (Northridge) said:

> I think, by and large, the state has their head up their butt. Because they are not educators. They don't even know what they're doing. If the legislature spent as much time looking at their own business as they do ours, we would be in better shape. I have absolutely no confidence in the state or any faith in them or any respect for them when it comes to the educational enterprise. None whatsoever. ... I only have so much energy to spend and I want to spend it where I'm going to make the biggest impact. And running around Lansing and talking to these people is not making any impact as far as I can see.

Eastman (Buffalo) echoed the same frustration:

> I think it makes me angry more than anything ... that someone who doesn't know anything about education, doesn't know anything about teachers, doesn't seem to know anything about dealing with people ... is going to impose something from Lansing on the basis of politics. As long as we make decisions in education based

> on what's politically expedient rather than what's good for kids - then we're going to have some problems ... I think that the whole reform movement, the whole reform concept, is so incompetent.

Bowman (Landcaster) agreed: "It seems like so many of these reforms are coming at us - not based on the best research. And that's scary. It's just someone's political agenda, rather than what's really going to improve education for kids. And that's pretty scary. Because it means that [when] the next politician comes along - we're going in another direction."

Davidson (Justice) felt that state control was simply a natural consequence of the political process: "The politicians are making the laws. One should expect that they are political and one should expect that they are designed to further the goals of those people in office. So it's not something you should naively protest. Rather accept that they're going to happen and deal with it."

Montrose (Lowden) raised another issue - a sense that input from superintendents is largely ignored when reforms are still in the planning stage: "Why I have the problem with state reforms and what the state has done ... was that they did not have enough respect ... I think they didn't properly respect the school administrators as knowing what they're talking about. And too often they want to dismiss what I see as our good advice ... as 'why, you just don't want it to happen.' What it really is ... is we know what we're talking about from, you know, day-to-day business."

Thus, the second finding from the analysis is that state mandates have been accompanied by a real or perceived shift in control of the local district. Superintendents question who they actually work for; they sense that it's the state educational bureaucracy; and that troubles them because they doubt the sincerity, expertise and motives of that bureaucracy. Some superintendents accept the shift in control as a fact of political life, some appear to resist, but all agree that it's happening. And they think reforms would work better if they had been consulted.

The third major theme to emerge from the analysis is that state mandates have ultimately affected the role of the local superintendent, creating more work and dissatisfaction. For one thing, superintendents equate state mandates to being 'more paperwork.' Barber (Clay) said: "The paperwork is just phenomenal with school improvement. I mean just ridiculous. The state department of education is the one loose cannon in this whole thing. And it's going to be wild and wooly. ... you know when you look at mandates, I equate mandates with increased paperwork. That's it."

Buth (Clear Lake) agreed - and doubts that they're read: "The reports have grown every year. The sad part is I'm convinced no one ever reads them. You turn them in and sometimes if you don't turn one in, they may forget and even ask for it again. But even if you do turn them in, there's no one left in the state department to read them. It's just silliness." Duffy (Northridge) told this anecdote about 'testing' the paperwork requirements:

> One day I said to the assistant superintendent, 'Suppose we don't fill any of this stuff out. What do you think will happen?' He said, 'Well they might take our money away.' I said, 'Well, let's just not fill it out and see.' So we didn't. We

> just didn't fill things out. And nothing happened, nothing happened. Oh, eventually, they caught up with us, or they came and said, 'You know, you're outside of the [deadline].' And I looked at them and said, 'Look, that's a lot of baloney. We are following the spirit of the thing. Do you want these kids to get an education or do you want to worry about this [deficiency] over here.' ... my feeling about this state is that they've got about one and a half people working in the state department anymore. They are not a threat.

Several superintendents discussed the frustration being experienced by them and other administrators. Seymour (Forest City) said:

> While I don't agree with all that the state has done, I have to tell you that I don't fight it. We do our forms and reports accurately ... I'm not going to throw away any form that we have to do. And the forms that we turn in are accurate and timely. But I'm not going to worry about - and I simply don't worry about - and I don't pass on to frustrate other people, some of these things which are really educationally meaningless. And I think it has frustrated superintendents and administrators all over the state.

And Walls (Ottawa) said, "I think the frustration of the mandate business and the legal issues, are just incredible. And we do spend a lot of time on that."

Winer (Van Horne) discussed the special impact on smaller districts. "My administrators are more frustrated ... because they're saying: 'Here's another thing to come down ... we only have three administrators in the district ... 700-some kids ... [yet] have the same requirements as a Class A district ... the same amount of paperwork to kick out ... how are we going to do it all?' We **can't** do it. ... the things that have been required of us in terms of paperwork, and proof that we've done that, as been time-consuming. And maybe not needed."

In addition to the increased paperwork, it's become more difficult for superintendents to supervise their districts. Briscoe (Parkway) said: " ... when you talk

about all these mandates, you know and I know a superintendent really can't have his finger on all these things. But we must now have our finger on a hell of a lot more things than we ever had to have our fingers on before. Because the final accountability ... that's your responsibility. I mean it doesn't make any difference what the circumstances were. It's your responsibility."

Another point is that mandates have made the superintendent's position more difficult and less desirable. Hales (Cambridge) said: "I think that we see an every-decreasing number of people interested in being administrators. They look at that complexity compounded by the public abuse that is injected into our lives and there's no question it is more complex. Far less rewarding."

Giammarco (Oswego) said that the state's activity has "... demoralized our profession. It has made me angry which ... I have never been angry before. I find myself wanting to be defensive, which is not a behavior that I would ever say about myself. But I'm also at a point now where we need to stand up and stop taking a back seat to whoever wants to impose something on us. I think that I'm angry at my colleagues for being intimidated by all of these things."

Hill (De Soto) discussed how the state mandates have restricted the superintendent's role: "I think the job turns out to be one where you have to think of all the reasons why you can't do something, and be able to eliminate all those before you can actually go forward ... I feel my job is to figure out how we can do what we ought to be doing here, with a minimal amount of disruption because of state reform regulations."

Finally, Wilson (Dumont) said, "... the rules, regulations or hoops that we have to go through as the administrative leader of the district ... are just overwhelming. And I think that it has **worsened** in the eight years that I have been superintendent. And certainly, over the long haul, I'm sure that's the case."

In summary, superintendents feel that the state mandates have affected their role in several ways. There is a significant increase in compliance reporting and other paperwork - and significant doubt that it's being read. They feel that it's more difficult to supervise a district; they (and other administrators) feel increasingly frustrated. There is a widely-held belief that the superintendent position has become less rewarding and less desirable. It's another manifestation of the gap between the idealism of the state education bureaucracy and the reality of trying to implement reforms in the real world.

Curriculum Reforms

The purpose of the study was to determine the effect of state school reforms on the role of the superintendent and the organizational structure and operation of the local district. The researcher postulated that state actions have affected the role of the superintendent and the structure of the local district. The focus of the study was a series of 208 individual school reform measures enacted by the Michigan legislature or mandated by the governor, state superintendent or state department of education between the years of 1969 and 1994. Eighty-five of those reforms dealt with various aspects of curriculum

reform including specific mandates concerning MEAP testing, common goals of education, vocational and special education, bilingual programs, gifted and talented programs, alternatives for expectant mothers and teenage parents, foreign language credit, AIDS and HIV education, appealing student grades, computers, dispute resolution, student portfolios, state-endorsed diplomas, gender equity, core curriculum, at-risk students, early elementary initiatives, adult education, sex education, credit by testing, dual HS/college enrollment, disability accommodation in assessment, and multi-cultural education.

Many of the 85 reforms dealt with single issues or were of limited scope. However, superintendents specifically discussed the following measures as ones which significantly affected them or their districts.

Chart 4-5: Curriculum Reforms Frequently Cited by Superintendents

*Michigan Educational Assessment Program (MEAP) (1968) inaugurated the statewide testing of all public school students in grades 4, 7, and 10 in math and language arts. Norm-referenced from 1969 to 1971, and criterion-referenced after 1971. In later years, other subjects and grades were added. Designed to aid students and teachers to identify deficiencies in learning, it came to be misused as a comparison between districts.

*PA 451 (1977) made special education mandatory in Michigan with stricter standards than the Federal requirements.

*A Blueprint for Action (1984) was Michigan's response to the federal A Nation at Risk report of 1983. It contained four areas of recommendations: 1) Improving learning; 2) Creating a learning environment; 3) Strengthing the profession; and, 4) Delivering educational services.

*Goals 2000 - Deliver the Dream (1988) was a follow-up to A Blueprint for Action. It contained incentives and recommendations for core curriculum, school improvement plans, pre-school, employability skills, curriculum, communicable disease policy and technology.

*PA 171 (1989) also called the Computers of Tomorrow act. A state program to provide thousands of free computers to Michigan classrooms over a five-year period. (After funding the first year the state defaulted and local districts had the final 80% deducted from their state aid payments.)

*PA 25 (1990) was (at that time) the largest package of school reforms. It required each district and building to develop a mission statement, continuous 3-5 year goals and committees to make building-level decisions; develop a core curriculum, a high school proficiency exam, portfolios and state-endorsed diplomas; pursue state-endorsed school accreditation and publish annual reports.

*PA 335, 336 & 339 (1993) contained over 70 separate reform provisions, eclipsing PA 25. It added details to many PA 25 initiatives; required 3-5 year school improvement plans and gender equity; a core academic curriculum at elementary, middle and high school; accreditation; provision for at-risk and early elementary students; new criteria for adult education; communicable disease and sex education instruction; portfolios beginning in the 8th grade; and making the MEAP more difficult.

The analysis of the data concerning curriculum reforms was organized differently than it was for communications, finance, personnel and general administration reforms. Whereas reforms in those areas usually tended to 'stand alone,' the curriculum reforms are almost always inter-related. For example, the reforms concerning core curriculum, graduation requirements, dual credit, accreditation, proficiency tests, testing out for credit, MEAP testing and endorsed diplomas - are all interconnected. That's how superintendents saw them, and it was important to capture that perception as it appeared in their responses. Therefore, the analysis of curriculum reforms progressed from the total perceptions of one superintendent to the next, etc.

The major theme to emerge from the analysis is that State efforts have made district organizations more specialized, hierarchical, and universalistic as well as more diverse, diffuse and inclusive. State efforts have increased district complexity, given superintendents more things to do, more people to hire and account for, and less purview to direct either the things being done or the people doing them. This part will examine how this phenomenon has affected the area of curriculum.

In 1992, the state passed PA 25, which was the state's school improvement package. In Braymer, Michigan, PA 25 fit in with ongoing plans for site based management. On the other hand, PA 25 forced the lowering of class sizes in K-3, and without additional funds, the district had to increase class sizes in grades four and five. As Halder (Braymer) explained, she uses the state reforms as a crutch ... "We're mandated to do X, Y, and Z so we can't do A, B, and C. Sometimes that may work to our advantage, other times it may work against some of the things we're trying to do."

Curriculum reforms become the center of discourse; what people talk about. Halder (Braymer) talked about the stress these acts cause because no one is sure what's going on. In Braymer, it's " ... how can we incorporate 335 and 336 into PA 25 ... it's an evolving communication process. Well, I thought we had PA 25 in place. And now we come up with 338 and 339 and how do we incorporate all these."

Farley hired a curriculum director as a result of PA 25, and the superintendent (Breck) saw PA 25 as positive because it gave him ammunition with the board. Breck likened PA 25 requirements to North Central Association requirements which he used to get what he wanted for his school when he was a principal. And he doesn't mind when his

special education director tells him all the time, "This is the law, you have to do it." Breck thinks the reforms are good, because they are telling the district to do what they have to do. He agrees, "There's more to do and we're better for it." Breck doesn't mind that he has to spend so much time with the curriculum director because he just has to know 'this stuff,' which, according to him, superintendents did not know before the state forced them to.

Daley (Vernon Hills) had to hire extra teachers for K-3 classes as PA 25 required. They handled the other requirements without more personnel. Special education is a strain on resources with more people being identified al the time. And Daley worries about the people in Lansing, with their rules and expectations "... that students cannot make or meet and they're going to create an endangered or abused specie ... there's a percentage (of students) that cannot and local districts can better adjust to those students."

Hales (Cambridge) used the interview to blast the state board for not understanding what he, and they, were supposed to be doing, but on the matter of curriculum he was tired of the changes, in PA 25 to 338 and 339, toward and away from accreditation, saying that the testing programs were inadvertently designed to make school districts look foolish. The ever-changing legislature was responsible for the ever-changing positions they took. And "... our state superintendent and the more recently elected Clark Durant and overnight a totally new agenda comes out of the state school board ... lack of continuity ... lack of long range planning." He continued: "There are so many ... there're certain ones that are beneficial but the greater issue is the volume of reforms ... to me it is

not the individual items, it is the sheer number and the inability to keep track of them let alone understand, implement and monitor them."

Hales was also upset that the MEAP "... was designed for one purpose but then used to report on the comparison of schools. I think that is an illustration of, not by design but in effect, it has been very detrimental for kids." Hales also thinks that the state is only requiring what would be done anyway and believes that the state is wasting the efforts of ..."a great number of people who are spending a great number of hours doing things that are not important in the community or documenting what they were already doing, or doing it in a different way to comply with the regulations and ... the area of curriculum has been the one that ironically has caused the greatest drain of people's time away from curriculum and instruction."

Hunsberger (Clayton), speaking of the MEAP and the portfolio and the proficiency test says: "I mean we have been changing the course; we are having to constantly shift gears and we have no continuity for either the kids or for the teachers and principals and their administrators to be able to structure a program to meet an end result."

Hunsberger also thinks that people distrust bureaucracies, all institutions, "... and most people don't pay much attention to schools beyond their kids' earliest years, but the open meetings reforms have given the zealots, those people who have been traditionally anti-school, more ways to get back at us and pick at our skin." He is skeptical of the curricular reforms. "To me the jury is still out whether portfolios are going to do it, whether accredited diplomas are going to do it, whether or not MEAP tests are really

going to lead to accountability ... I want to see longitudinally what's going to happen."

Garrison (East Burlington) is skeptical of mandates. He says in response to whether the curriculum mandates are going to produce a better student: "I don't think so. I don't believe so. The only positive effects that I can see occurring are that it will shore up minimums. I'm not sure over the long haul that these are going to bring about better students ..."

And he doubts whether "... meeting the needs of a test and meeting the needs of the students comes into conflict. On the other hand, the public pressure for our students to do well comparatively becomes an issue ... I'm not sure the generation of standards at the state level is in the best interest of the students." He is equally skeptical about the use of reports. "... I don't object to standards reforms. To the degree that we are needlessly expending energy to write reports which, by their very numbers, will not be read seems to me to be wasted energy. If we do these reports which are going to go unread, what is the value?" And he believes that in the long run, the reforms will 'shore up the minimums' but in the long haul will not bring about better students.

McKenzie (Greenfield) thinks that the legislature always assumes that no one was doing anything before the law, but in affluent communities, like his,

> we were doing all these things. And you resent that you annual report has to look different because someone has decided it has to be that way ... and we're running a summer program for 160 kids who we have high risk students. We should have been doing that all along but we're doing it because we want to address some things that have shown up on the MEAP. But I would like to think we would have been smart enough regardless of whether we have to. And in that way the state has been on course with the district.

He also thinks that the state should leave the high achieving districts alone and concentrate on where the needs are. "They tend to micro manage and they tried in their legislation to be too precise. And they end up creating this cumbersome reporting mechanism."

McKenzie has concerns about the lack of planning for the core curriculum mandate: "... take the core curriculum, how many years now is it and we still don't know what the requirement and the debate is still going on." Is it a mandated core curriculum or is it an advisory core curriculum? Has it had an effect? I don't know, he admitted, although "... what we have now, as opposed to the old MEAP which was a kill and drill exercise, is something that does measure some things that are pretty important."

Then he gave an example of an unintended effect.

> One of the big residential developers, Herman Frankel, who's got a big new project in West Bloomfield, published a brochure for his subdivision. MEAP scores from five surrounding districts with the headline, "We cared enough to choose the very best." Bull puckey! He cared enough to get the property near the lake so that he could get to sell half million dollar houses. And to hold up Walled Lake and Farmington and Novi and whoever else as being somehow inferior to West Bloomfield is the ultimate bastardization of that process.

Superintendents express resentment at the intrusion, at the time being expended in pursuit of state designated ends, skepticism about the state's intent or the state's wisdom, some modest admiration for the new tests and for the fact that they know some good things, and in Breck's case, that they help the dialogue in the district. More superintendents will say that the test and mandates help them do what they want to do anyway. They resent the politics, but these people understand politics so they don't get

too upset about politics; overall the reactions to the curricular reforms are not serious, and there's some gratitude that the state is putting out an agenda that helps the superintendents. Some resent that the new tests are being misused. There's not much evidence that they changed the role of the superintendent; that they did make things more bureaucratic, is without question.

Giammarco (Oswego) says that today's superintendent better know about curriculum; that's being attacked. Curriculum is frustrating. "It's like we are dancing to the tune that somebody is playing in Lansing and the tune changes all the time. And it's whoever is in a position of power to impose it on us that has made me very angry. And in some cases I feel I am working for the state."

She likes the school improvement mandate and approves of PA 25 and admits to hiring people with experience in curriculum. About teacher certification, she says:

> For instance right now, they're talking about eliminating teacher certification ... they want to get non-teacher types in the classroom to share with teachers and kids so they are going to learn more. Well, that to me is a nice activity, but how will eliminating teacher certification impact student learning? In other words, you're lowering your standards. So if the goal is that kids are going to learn more or learn something in the content area, eliminating teacher certification is the way to go about it. My point is the way these things are coming through as mandates have not been thought through.

Barber (Clay) says, "We got into school improvement before it was mandated. And I think we were better then. And once it became mandated, it's now management by checklist. Particularly from the state department. Getting our school improvement plan in ... we're just doing our annual report right now. There's a lot of 'just get the damned thing in' you know?"

And he thinks that his assistant for curriculum "... has been the driving force, focusing on what we teach and the extent to which kids are learning ..." Otherwise, he feels no pressure from state or community for reforms.

On how he will react to the mandates: "You know I go down and look at a mandate. I don't fight them anymore. I spend a lot of time implementing their mandates and never have time to sit back and decide what it is that we really want. On cases like this, we'll huddle up with the principals and implement the darn things. We don't fight them." He said also that the elementary schools were easy to move, the high schools much more difficult, the middle school, in between. And he likes the curriculum reforms.

> I think, among reforms, curriculum is the one that holds our feet to the fire. I hope they don't back off on this, but I think they are going to. Knowing the way we are - the emphasis will wane. They're tough tests; until a local district can come up with a better set of objectives, I think we should support the state ones. The group I worry about is the non-college bound. They're not going to get through the proficiency tests. I'm a science major and I had a heck of a time with that science test. It's tough, tough, tough. They're not going to get through it; there's no way in hell they're going to get through it.

On the other hand, the site-based decision making is less effective just because staffs divide, then turn to the principal, to make the decision. As far as the governor's report card, he says: "I was on a pilot committee here in Genessee County and we spent an awful lot of time gathering data for the governors report card and there's nobody out there that is interested. I can dial now on the Internet and find out more about the Holly and Clay schools than I want to."

Buth (Clear Lake) says that the changes have been minimal. "Basically, it's still run by the superintendent and board ... I walk in the elementary classroom; basically it's

the same classroom I saw 30 years ago. The teacher does the job. The curriculum is upgraded and the textbooks and some of the resources [are different] but basically it's the teacher doing the job in the classroom everyday."

"And I look at PA 25 and all those mandates, while I think many of them are good, I don't think they changed the course of education. They are not the same thing as a new agenda, not like the charter schools." And he repeated that the tests do a lot of harm to the less able kids who are in trouble and don't know what to do with the prospect of failure.

Superintendents express an admission that the state is in charge, a skepticism about the worth of the efforts, some discouragement about the apparent ineptness by the state, an admission that the state curricular has changed their role and some disagreement as to whether they have changed the kids and another admission that they have not changed the teachers. Clearly, they don't respect the state people as educators. They refer to themselves as educators, the state as hinderers or bureaucrats or outsiders. They don't see us all as pulling the same cart. As Duffy (Northridge) said, "They are not educators, they don't even know what they are doing. I have absolutely no confidence in the state or any faith in them or any respect for them when it comes to education. None whatsoever." But the mandates help the dialogue; they put the superintendent in the curricular dialogue, they control the discourse, the superintendents who want to change have the mandates as helpers.

Duffy (Northridge and formerly in California), told the funny story about California where she didn't fill out the paper work ...

> ... my feeling about this ...state is they got about one and a half people working in the state department. They are not a threat. I'm more concerned about the direction of Clark Durant and who they are going to bring in [to the state superintendent's position] but I don't spend much time on that because I know that if we continue to work on things here in the district, that's what matters. I don't have my head in the sand, but I have so much energy to spend and I want to spend it here ... I'm not trying to be naive but they [the state people] are not the major players in my world.

> Yeah, the MEAP had an effect. It doesn't affect who we hire but it does have an effect on how we approach our task. Prior to my arrival, we were just blowing MEAP off and I came and said, "Look, it's pedagogically flawed and it's kind of stupid, but that's our report card. We have to do a better job." So I think that MEAP and the new finance law are the only two things that have had any impact on us.

As to the core curriculum, she is glad they dumped it because "... we're going to do it anyway ... and now we can do it without their excessive stupid regulations that don't make any sense." They all refer to PA 25 as school improvement and she thinks that school improvement, PA 25, is a good thing. But Duffy is skeptical. "I don't think you can tie any of the state reforms to higher achievement. Achievement is about teachers and kids and classrooms and I don't think any of the state reforms have helped us change the teaching learning process."

Briscoe (Parkway) admitted that when PA 25 came in, he and his assistant superintendent took another district's annual report and copied it verbatim, knowing the state would not read it anyway. Briscoe sees that the state reforms haven't changed anything as evidenced by the fact that the high MEAP districts are still the high MEAP districts and the low MEAP districts are still the low MEAP districts. He doesn't see

systemic reform; he sees systemic reaction. "There has been no movement from the bottom toward the top; you can't legislate good education." And the state, rather than promoting cooperation, is promoting competition. Now they're saying: "Not only will we make you competitors to go after these crumbs, we will say, 'If you don't make it we will penalize you by 5% from your grant.' Now don't you know that if I had some schools in that category, I would say, 'Goddamn it, cheat, we are talking 5%. Answer the test yourself.'"

And ...

> When I get up there with people I respect, and I know are about systemic change and they say, 'Here is what we are doing;' Vernon Hills for instance, we are copying Vernon Hills' language arts curriculum because we think it is good. And when I called and said, 'Can I use it?' he said, 'Sure, go on, what do we care?' So the changes superintendents make come from people like you and me working together. We react to the state but we interact and change with our comrades.

As to the specific benefits of PA 25, he says, "It's made parents aware that somebody is going to give a report card of the school system. We can look and see how schools are. I can't deny that it has caused a higher awareness among some people ... and in some cases that leads to change ... so I think from that perspective, it has had some impact."

And Briscoe thinks the MEAP is positive because it makes him examine classrooms one by one, and

> ... it causes a greater degree of focusing ... in many districts, the district is standardized by the fact that the kids are standardized in their experiences and intelligence. Here I have to make sure what's going on in the fourth grade in one class is going on in other classes. So part of what the core curriculum affords me

> is the opportunity to do that, the direction. So I think that tougher MEAP requirements for the diploma will impact particularly in the next two or three years. Because now I tell ninth and eighth graders, 'You got to pass that MEAP.' And I hear them talking about it. So I think that the core curriculum and the changes in the MEAP will impact education, particularly in districts like mine, so yes, I think it will be very positive."

Donald Paquette of Grand View says that the curricular changes have fallen on the assistant superintendent for curriculum. "It has changed his whole agenda and it's had an impact on principals, more so than on the superintendent." He talked about the increased number of volunteers to help the kids pass the MEAP. "When I came to the district, we had a few volunteers; now we have hundreds that do the monitoring and tutoring; all being driven by the fact that MEAP is being monitored by the state and affects accreditation. Whether it's good or bad, we pay attention to it."

He also said, "I'm idealistic enough to believe that some of those [curricular] reforms were necessary and were going to be helpful. The fear is the over-emphasis on rote learning and so-called basic skills to understanding what is a basic skill. Whereas maybe the future is going to require more of a problem solver - a creative student." And

> ...today, when we do a curricular project, it involved a ton of people; parents ... it can require visitations, doing literature reviews and research. Twenty years ago we just took the state curriculum and adopted it. Or bringing in a couple of textbook companies and asking a committee of teachers to look it over ... in two or three weeks ... that's their science program.

Eastman (Buffalo) says:

> We always had site based management because we don't have an assistant for curriculum. We've only a part-time special education person and 11% of our kids

> are identified; we're sparsely administered and a lot of new ideas we kind of sneered at because we're already doing them and successfully. We could give lessons on site-based management and open enrollment. "But has it changed life here? I don't know. We think we are doing a great job with the top kids, [citing a Buffalo student on his way to sophomore status at Princeton] but little with the more difficult kids. (Referring to MEAP) ... the kids who are failing it before are going to be further from passing it.

And referring to what is coming from Lansing:

> Oh it makes me more angry than anything. That someone who doesn't know anything about education, doesn't know anything about teachers, doesn't know anything about dealing with people, is going to impose something from Lansing on the basis of politics; as long as we make decisions in education based on what's politically expedient rather than what's good for kids, then we're going to have some problems ...

And on reforms in general:

> It's clear to me that the people who are in power, the people who run for school boards, and the people who are in the legislature who rely on the same powerful people for re-election, do not want change. They like the fact that they can send children, the well scrubbed, to public schools, have them cared for ... that their kids are going to get pretty much of a traditional sort of instruction in what they need to be successful in college. They've always gotten that from us.

Then he goes on to say that if "... we were really serious about reform we would not be sending more money to Forest Hills which has passed 98% of the MEAP for the last zillion years, and less to Buffalo which has a very high proportion of very difficult-to-teach kids."

Winer (Van Horne):

> The pressure is not to go through and revamp the curriculum. We're doing those things not because the state is saying so, but we've just redone our outcomes. And we're working with Adrian [schools] on our assessment piece because we

think it's important to know where we're going. It's definitely not coming from the community and should the state say, 'We don't need any of that stuff,' we're going to continue to do it. But I think the pressure is coming from the state.

At the time he was interviewed he was trying to pass a bond issue for computers and said:

> ... the community does not think we need technology, we don't need the Internet. And we say that our kids should be exposed to the same resources, information that every other kid in the state is exposed to. You want them to leave Van Horne, and get employment, they're going to need to compete with those kids. And they ... the board, sense the control that Lansing is trying to jam down our throats, they also sense that Lansing wants to close Van Horne. They don't know what Beal City did to John Engler for him to be against small school districts but some things that are coming down are putting us in a real crimp. ... and some of the things that are coming - PA 25 and some of those things. There's no doubt we needed to do some of those things. Some of them were good. I don't dispute that. The annual report is not necessary ... we're wasting a lot of man hours putting those things together. Is it a good use of resources? I think not. But it does give us some data. We can see some trends over the years ... I'm trying to turn negatives into positives. What can we get out of this? How can we use this information? But my administrators are more frustrated than the board. They're saying, 'Here's another thing coming down ... we have only three administrators, 700 kids and we have the same amount of paperwork as a Class A district. How are we going to do it all?'
>
> We assigned three counselors to look after portfolios; that's a hard job because the kids don't take it seriously, because nobody's asking for it yet. But we're talking in terms of curriculum ... where are we going to implement that? Is it going to be English? What do you do with seniors? Not all seniors take English. Do you switch to government because all seniors take government? ... and in some things we've said, 'This is more important than your English curriculum.' And of course teachers say, 'What do you want me to throw out?' We want you to ask: 'What are the important things we should be doing?'

Geyer (Griswold), speaking of state rules: "We try really to take that all with a grain of salt and comply with the law. When they pass legislation that requires that reports be submitted, we always get them in but we don't feel compelled to live with the

spirit of what they are doing ... unless it fits with our mission ..."

And on curricular requirements ... "My colleague in the other office in here is called the director of special services. And he does all the compliance stuff. We have a big notebook - has all of our school improvement and all of our compliance stuff in it. In each building we have about the same people doing everything. That's one advantage of being small ... is that you've got site-based teams, and they do everything; they do improvement ... so you have a core of people taking care of these things."

> One who does the work ... the administrative staff is taking the hit. We've got a great staff in terms of working on the core curriculum ... they aligning the curriculum with the core curriculum and testing and every year our test results are going up nicely ... so we rely on staff to help on in those areas that relate to instruction. ... more time, I remember in the 1980's we would have a floating in-service day ... and we've have a heck of a time creating a good enough program so that people would feel like it was a day well spent. Now we have five professional development days plus stuff going on in release time before and after school. High school staff meet for 45 minutes before school every day on different things. They're cooperating with each other like they never have before. ... so as I say, I can't be negative on reforms. ... although some of the things in 335 are not relevant to what we're doing.

Overall he's positive about the curricular changes ... speaking to the way the state does it, get people from around the state and bring them together ...

> So I think you have a pretty good representation of the thinking that ought to be in the core curriculum. ... my only frustration with that process is to keep the target still long enough so that people can start hitting it, before you change it. On the old MEAP, our kids were scoring in the 90th percentile. Then they change it (the test) and it shoots down to 40 or 30. And you work your way back up, and still you don't have more than 60 or 70 achieving the objectives ... and you're saying those are essential objectives and you should be in the 90's ... so that's been a bothersome thing for me. ... you just wonder if you're ever going to get to the bottom quartile. I mean some people just can't understand the concept. Business people I talk to have a hard time understanding that you're going to have half the kids below average ... you have some kids out there who are two deviations below

the mean and they can't understand that they can't be brilliant people and excellent workers.

Hill (De Soto superintendent) has

> ... witnessed a tremendous increase in the regulation of public schools, starting with PA 25 ... and ... I think the state ought to set high expectations, that districts working hard with their students can meet them and the stand out of the way and let the districts decide how to get there. Hold them accountable. Go ahead and put the stuff in the paper every year so that we see how we are doing because that does create some pressure within districts to figure out how to get improved performance. And I think we are better off than we were 25 years ago because we are being forced to look at performance.

Hill, on portfolios ... "If you don't have businesses and universities asking for the stuff, it really makes the impact negligible."

Seymour (Forest City) says that 90% of his kids go to college and "... if you [sup't] want to leave here in a hurry, let those MEAP scores drop or the number of kids going to college drop." .

And he has created no new positions to deal with 25, 335, 336 and 339. None. The administrators take most of the hit ... he thinks also that the state is trying to make the schools look bad because they have decided, a priority, that schools are bad ... the state has passed a lot of policies ... annual reports and those sorts of things ... which at their base sound OK but they have not changed education a bit. They are not what education is about.

Lamb (Glastonbury) says that he approves of the curricular changes.

> I believe that by trying to identify what skills kids need to be competitive globally that we've raised the ante for ourselves. I think over time that we will see that we will align out curriculum ... this scattered curriculum that we have ... that we will

> realize that you have only so much of this time to use. And you're going to have to use it to get those skills and understandings ... so in that regard, I'm not opposed to what has happened. So I've been an advocate of some standards to shoot at. Because then I know how to align the curriculum. It's not an easy job but that's where I would stand.

As for the governor's report card, "You can read it. I have boxes of them, we use them as door stops." But no one ever asks for them. "But this high turnover ... with people coming and going ... they do shop school districts ... mostly upwardly mobile people. We get that all the time. They come in here and they've been to other districts ... and they have the MEAP scores and annual reports ... that stuff."

Walls (Ottawa) ... "My view is that most of that is absorbed at the administration level and impacts the teachers in some ways. Like the MEAP; you have to close down the classroom and issue the MEAP ... just a procedural kind of thing. But most of the educational reform and changes are pretty silent. They just sort of occur." Speaking of mandates ..."I think the frustration of the mandate business and the legal issues are just incredible. And I don't know that parents see that at all. People who come to central office are stunned with the time we spend with attorneys ... they have no idea the amount of ... we have to always be referring back."

> And the effect of reforms will be to cause instruction to become more focused. And some things that teachers are doing now may not be done anymore. Because what's counted, I mean what gets tested, gets counted. The thing that disturbs me about those proficiency tests is the people who put them together are the people who are in the discipline. So they lack a balance about what it's all about. They get so involved in their own discipline that they forget what it is all about. I have been through curriculum study after curriculum study and if one were to meet with any faculty ... there's not enough time for social studies ... we don't do enough math ... we need more foreign language ... there's never enough of whatever ... it's such a narrow gage that they are looking at. As to the MEAP, it didn't change what was taught but it did change when it was taught.

And Walls worries about the tests becoming a filter that limits a child's possibilities. And he worries about 335 and 339 because what is important shifts so quickly. "We may be measuring things that are not that important, and making big decisions about students' lives based on what is not important. ... what bothers me about this testing business is that we think we know ... I don't know of a reform that I just sat up and said, 'Oh my gosh,' but I try to facilitate it ..."

Steel (Washington Crossing): "You know a lot of curriculum would not have taken place without the state. We would still be teaching the way we did 20 years ago. We are not doing that now. I see it is good to be driven by the state, driven by the administration, and then it is filtered down. Yes, I see it as positive."

About the state board hearing in Grand Rapids:

> ... and there were some that were against the state core curriculum.. And here you had educators who screamed about the state core curriculum mandate two years ago. And now we are defending it saying 'We need this.' And why? Because the impetus to change the process and get our staff members off square one was incredible. Our curriculum never would have changed if it had not been for that. (Talking about a building in which he placed several new teachers) ... and I would not let anyone in that building unless they had an early childhood endorsement. We put five new teachers ... I would not let anyone transfer in ... And they all had early childhood endorsements. Now we have a non-graded second and third grade and the changes that are taking place in that building are phenomenal. We have an early-fours program over there now and PPI and it's quite an elementary center. And part of that is the impetus of the state saying 'You need to change.' And we have.

Carl Walter, Superintendent in Spruce, says he is very involved in curriculum - one of the breed of superintendents that have come in the last 10 years who ask, "How do we

improve teaching and learning?" - spends one day a week in buildings, and serves on the strategic planning committee. Of PA 25, he says,

> It is by far the most significant piece of legislation affecting public schools in the last 25 years ... in terms of improving it. The whole idea of school improvement, how can any person say ... I don't want to be involved in school improvement ... hey ... if you're not improving, you're declining. And a lot of people bellyache and complain but you know, not everything that has come through has been detrimental. I think a lot of it is long overdue. That's my view.

> And what have we done in the last 10 years?

> We have articulated and sequenced our curriculum. We've developed academic standards in the core curriculum. And we've brought our K-12 strategic planning committee and you sign up for it and it includes everyone. And you know what? People have gotten to know each other in the buildings and there's been a lot of K-12 discussion of core curriculum ... and then we have four core curriculum areas ... and then technology of course is part of core ... and we have communications ... and we have a facilities and finance committee and we have a portfolio ... because of that initiative ... the fight has been lost. There is no local control. It's a joke. The battle over local control has been lost. The state is calling the shots, rightly or wrongly. We've lost the battle for local control and we've lost it for a lot of different reasons. And for any local board of education to think they control a lot of anything ... I don't think so.

He agreed that he is a "branch manager for the state" ... and in response about the core curriculum and the MEAP, is it going to produce a better student, more effective teacher, pleased parent?

> ... I'd say yes to all three. I'll tell you why. MEAP has brought a focus that we did not have before. Our scores have improved drastically because the board makes it a critical issue that we improve MEAP, we have paid attention to it, it's made teachers more aware and it has increased parents' confidence in the school because people see that we are improving ... and I tell the staff ... the higher the expectations, the higher the results ... it's what the kids can do ... so I think those things are very positive.

> The colleges and universities have really improved their teacher prep programs. Michigan State is one example ... they have improved their programming and made greater criteria to be getting into schools of education much higher. And I'll tell you one thing, we are turning out better people than we did. With all due respect to those of us who came in 25 years ago, today there is a higher quality ...

Stewart (Rockwell), who believes that A Nation at Risk built an awareness that there is a problem but "... the issue is being more politicized than it is a real issue. The public schools in the last 10-12 years have made tremendous progress but we're still being used as scapegoats by our governor and others to keep the fires burning ... they are almost like demagogue in using that issue ..."

And in response to a question about PA 25, 335, 336 and 339: "I think the people that assume the greatest responsibilities are those that deal with instruction and curriculum; principals, curriculum directors, ... but ... I think that only the level of administrators and directors are dealing with most of those issues now because they (the issues) are changing every week almost ..."

And referring to the legislature ... "The high school proficiency test - oh my gosh - they just don't seem to think through and base their decisions on research ... they just want to push reform, reform, reform without thinking anything through. And the main weight of responsibilities falls upon administrators, certainly ..."

And in response to a question about what a superintendent, from 20 years ago, would notice as different if coming back today... "Well, I think they would see emphasis placed on instruction. They would see the inordinate number of reforms that have to be filed."

> I think the core curriculum is a good idea when it comes to helping school districts that may not have had a systematic objective-based curriculum to begin with. In our district, we have an instructional program, K-12, that is based on performance objectives and so forth, it ... mandates that come from the state ... I know that my visceral reaction to some of these mandates is, 'This is the stupidest thing I've ever seen. We're not going to do this.' And there are some things I don't pay a lot of attention to, but having said that ... the bigger mandates, like PA 25, we look at it and say ... you know there are some real possibilities that we could use this to make some progress. And we have ... school improvement was something I had been reading about, wanting to do anyway, and here came the law ... let's take advantage of that by going to the principals and the staff and say, 'Now we have this law, how can we take it to improve our schools?'"
>
> We still do our curriculum with curriculum committees formed with teachers, and we still do a lot of the management with decisions made at the local school level. But did we form a site-based management team? Nope. And did I know it would go away? Yep! And it's going to go away... So I try to make a conscientious effort to determine what we need to do and keep from wasting the time of teachers and principals whose jobs are big enough. ... PA 336 and 339 are examples of where we took the chaff from the grain ...

Are the curricular reforms going to make Justice better? Davidson said:

> Yeah, I think, my reaction might be different from others. Mandated core curriculum will be a way to move high school staff that might move as quickly, whether the core curriculum is mandated doesn't matter to me as long as the proficiency test is there. That is, you mandated core curriculum. If you have a test the test is about something, what is about? That's called curriculum. Is it mandated? You bet. The proficiency exam and the MEAP tests are tied to accreditation which is tied to funding, so we do have a mandated core curriculum. We do ... and I think the proficiency test has the potential for moving high school instruction forward. Authentic assessment ... its time has come.

The superintendents differ, as expected, in their reactions to reform measures. Some see the reforms as helpful, some not, some use them to do what they want to do, some say, "We were doing it anyway." Some say the state is in charge; many say that. But others say that we're operating as we always did. What they don't say, so far, is that

the state changed their role. It focused the role, maybe turned the role from this to that, but these people still see themselves as in charge. Central, important, active and as educators, first. They like or don't like the state, like or don't like the changes, but they don't see their role as having changed. Not yet. But the structure is different, more specialists, meetings, committees, interaction, not much change in superintendents' roles but definite change in organizational structure. The state is more important, but the position of superintendent is still central, still essential, still respected, and if anything more of all three. Now you have to be an educator to be a superintendent. This is ironic, because the state has discontinued administrative training and certification as criteria for becoming a Michigan superintendent.

Chapter Five

Conclusions and Recommendations

The researcher's purpose in this study was to describe and explain the effect of State reform efforts on superintendents and on the organizational structure of local public schools. The researcher has postulated that the impact of those reforms has caused changes in the role of the superintendent and changes in the structural organization and operation of the local school district.

Previous chapters discussed the evolution of the role of the local superintendent and corresponding changes in the organizational structure of the local schools; and the purposes and chronology of state reform efforts during the past 25 years as seen from the perspective of the four state superintendents who served during that period. Also discussed was the methodology of this study and the analysis of and findings which emerged from the data; the in-depth responses of 27 Michigan local district superintendents.

The data from the 27 superintendents show that the superintendent's role has been significantly affected by reform efforts. The superintendent must inform the board, the community and the staff about the objectives and specifics of the reforms; generate public support for the district's mission and portray it in a positive way; overcome public apathy, and often educate legislators and other public officials about the local effects of reforms. The vehicles for reporting to the public, the Annual Report and the Governor's Report

Card have aroused little public interest. There seems to be a general societal mistrust of all governments including local public schools. Trust cannot be created through reforms - it must be earned locally. Superintendents spend much time combating misinformation by the media, politicians and others. The reforms concerning financial openness have, likewise, had little effect on trust or support for schools but have become a useful tool for critics and opponents. The communications and financial openness reforms have considerably increased the workload of superintendents and central office personnel. Other reforms require the superintendent to change the attitudes and behavior of employees, especially of veteran staff who are too young to retire. Superintendents spend more time with compliance and reporting. They feel that it's more difficult to supervise a district and they feel increasingly frustrated. Most superintendents believe that the position has become less rewarding and less desirable. State reform efforts have increased district complexity and therefore given superintendents more things to do, more people to hire and account for, and less purview to direct either the things being done or the people doing them.

The data from the 27 superintendents also show that the state reforms have significantly affected the structure and operation of the local district. The organization spends considerable time and resources publishing required public reports, with little evidence that they are read by the public. Additional resources are spent reporting compliance with reforms to the state. Proposal A helped poor districts and forced all districts to carefully manage their spending. Superintendents applauded the equity objectives of Proposal A regardless of how it affected their own district; but they felt that

much of the public misunderstood its consequences. And they felt that "A" means a loss of local control, increased state control, and difficulty with budgeting and negotiations. Reforms have increased the workload of every school employee who has to deal with them. Reforms have caused districts to look for different qualities in newly-hired employees; and to change or retire older employees. Complying with reforms and changing employee behavior have required significantly more inservice activities and resources. State reform efforts have made district organizations more specialized, hierarchical and universalistic as well as more diverse, diffuse and inclusive.

Finally, the data from the 27 superintendents show that the pace of school reform legislation and regulation, and the sheer numbers of individual reforms enacted, have significantly increased in the past 25 years - especially in the years since the publication of A Nation at Risk and the consequent state and national reform activity which followed. In Chapter One, the background of the superintendency was described. There were periods of previous school reform activity: in the decades before and after 1900, in the 1930's, and after World War II. But the years in between those periods were ones of relatively little change or activity. In the early 1970's, during Dr. Porter's administration, the pace and number of reforms began to increase - reflecting the implementation of his reform agenda. Still, the reforms were enacted individually; and totaled only a few each year. After the publication of A Nation at Risk (1984), the pace accelerated and the reforms often came in packages - reflecting the focus on specific catagories: educational goals in 1987, academic alternatives for students in 1988, and curriculum incentives in 1992. The trend of the legislature to pass ever larger packages of reforms continued with adoption of PA 25

(1990) with 10 reforms, and peaked in 1993, when the package of PA(s) 335, 336 and 339 contained over 70 separate reform measures. Nor was the Michigan activity unique. In their interviews Runkel and Bemis explained that, in the years following A Nation at Risk, state superintendents, state boards of education, governors and even education leaders in the legislature attended national conferences where reform ideas from other states were discussed and exchanged. The attendees then returned to their home states with the goal of implementing those ideas which seemed to be working elsewhere. Of these, "the Education Commission of the States is probably the most influential. ... Another one you probably never heard much about is Education and the Economy; another fairly highly influential policy-developing institution." (Bemis) In part, this accounted for the increasing number of legislated reforms.

Chapter Two Revisited

The contribution of this study to the sum of previous research lies in comparing what actually occured during the 25 years of reform efforts, from 1969 to 1994, with what the four state superintendents said (in their interviews) they were trying to accomplish. Each of the four was motivated by dissatisfaction with conditions in local schools, and their efforts were designed to change the conditions so that school could succeed. Dr. Porter, who was perhaps the most visionary of the four, proposed a comprehensive agenda of reforms which, to a remarkable degree, each of his successors advanced during their own tenure. The elements of the Six-Step Accountability Model - goals, objectives, needs assessment, delivery system, evaluation and public reporting - are found at the core

of many subsequent reforms. He worked to eliminate inequities in funding (the Bursley formula) and segregatioin. He promoted students' rights and responsibilities, MEAP testing, vocational education, special education, financial accounting, re-writing the School Code, and teacher inservice. His purpose "was to try to get schools to face up to the fact that they were not educating all children." (Porter) He showed little interest in micromanaging the local districts or requiring them to devote substantial resources to elaborate reporting and compliance activities. He said, "All we think is that kids ought to be able to read, compute and know science when they finish the school system. We don't give a damn how you provide the instruction. That's your responsibility. That's what local control is." (Porter) When asked if he was pleased to see much of his original agenda enacted, he said "A lot of people in the Department of Education have said to me: 'You know, this is where we began 20 years ago, and now it's coming to fruition.' It's not quite what we had envisioned but it's getting very close." (Porter) During his tenure Porter did not advocate the type of measures used in later years to impose reforms on the local districts (i.e., incentives, penalties, receivership) but he is nevertheless unhappy with the slow pace of reform and the local resistance that still exists. "If school people would just pay attention and follow this stuff, they could be light-years ahead. Michigan was so far ahead of the nation 23 years ago, it was unreal. Now the rest of the nation has caught up." (Porter)

When Dr. Philip Runkel succeeded Porter he continued Porter's initiatives, but he also devoted considerable effort to developing more specific goals and documents. In his

first year (1979) The Common Goals of Michigan Education was published, and in 1984 he published A Blueprint for Action; the Michigan response to A Nation at Risk.

> After A Nation at Risk there was a great deal of clatter, across the country, about the condition of American education. Articles. Test scores were looked at ... and the perception was that we were left wanting ... and weren't doing very well. I knew that we had to do something about that. There were pressures from the legislature. ... So we met at one of our Board retreats, and tried to set some goals, and said we ought to set up a blueprint for action. And we used the term 'blueprint' because that's what it was. (Runkel)

Speaking of "Blueprint" he said it was, "...a fairly innocuous document. But it was, at least, something we could put our hands on, and make some recommendations. And [it] probably paved the way for some of the more stringent mandates that went into effect later." (Runkel) In his final year (1987) the Department of Education published Goals 2000: Education for a New Century and the Michigan K-12 Program Standards of Quality.

The Runkel years saw the introduction of financial incentives to local districts for complying with state reform efforts. This represented a shift in tactics. In Porter's time the state thought local districts would reform because it was the right thing to do; in Runkel's time the state offered money to induce the locals to reform - and in so doing, increased state control of local operations. "We started getting a whole different kind of attitude by the Legislature ... I think the Legislature was in a position where they wanted to hold schools more accountable. There were some strong local [control] advocates on the State Board. But even they changed. (Runkel) He was aware of the resentment building at the local district level: "Generally, I think it was pretty well received by the

people in the field. I mean there were obviously a few that saw this might be moving toward [State] encroachment. ... there was a whole series of what you'd call 'quick fixes.' If you do 'this,' 'that' will happen. Not really long range thinking and planning and so forth about what the outcome is. So the locals would obviously continue to build resentment." (Runkel)

Runkel was the only state superintendent interviewed who served two different governors - from different parties. He began the state accreditation initiative; "I started it because we have never really paid much attention to quality at the elementary school. And middle school. They have been neglected, you know." (Runkel) He also began leadership training and administrative certification efforts. But his effectiveness and interest began to wane with the first term of Governor Blanchard from 1983-87.

> When Blanchard becomes Governor, he goes to these governor's conferences. And all these governors have their own little initiatives. And he doesn't have his. We had some - but they weren't his. And he really couldn't run his own game plan without us. ... They held a series of hearings on how you improve schools, around the state. It was nothing, you know. It was political hype. ... And then it becomes the governor's program. Almost overnight! The Governor was signing on... Then you started really moving toward more centralization. (Runkel)

Runkel resigned in 1987. During his tenure he clarified and focused the agenda begun by Porter, and added several initiatives of his own. He was arguably the most politically astute of the state superintendents to serve during this 25-year period, but he recognized and regreted the way in which education reform was evolving in Lansing.

> I tried to work with both the Democrats and Republicans. Now this thing has gotten so partisan. See, I don't think kids have a political party. And we ought to be representing all of them. People have good ideas on both sides of the aisle, and we ought to listen to them. (Runkel)

And he was the most aware of the effect that Lansing's actions were having on the superintendent and the operation of the local district.

> The schools have taken on all these issues. **They can't**. They can do better, I'm sure, but they can't solve all these problems. ... You just don't realize the different kind of players that are going to be coming at you. All the different groups that want a piece of your time. Most people figure you have more power than you do have. ... It is a major difference. ... So I think it's a frustrating experience to know who you go to, to get some help or information or direction. In fact you probably want to become lost. I mean you probably want to get out of this game and let someone else put their head under the hatchet. (Runkel)

Donald Bemis served during most of Blanchard's second term; officially from July, 1988 to July, 1991. In reality, his influence ended soon after Governor Engler succeeded Blanchard in January, 1991. During his tenure he was criticized for implementing Blanchard's education agenda without evidence of holding any independent views about reforms. When interviewed, his responses definitely represented the Lansing perspective and seemed to lack the awareness of reform effects at the local level that Runkel had. Concerning the reform agenda he said "the biggest movers probably were the state legislature. ... The Governor was also incredibly important in setting the education agenda." He considered the Department of Education to be mainly reactive, because it lacked the time, resources or personnel to be otherwise. Using a strict definition of the term, he maintained that the state levied very few mandates on local districts. "By mandates, I mean things that schools absolutely have to do. Now if you consider a mandate something [that] if you don't do it - you don't get your money - that's something different." (Bemis) In contrast, the local superintendents in this study would define an action required to receive state aid money - as a mandate.

Bemis felt that we have never been very clear, as a nation or in this state, about what we expect from public schools but "we are the closest to it with the advent of PA 25." He felt there should be a great deal of flexibility at the local level on how to do things. Yet "... if I were king, I would do a great deal more as far as setting goals ... than is even in place right now." He felt that Lansing was justified in

> turning up the heat ... because there wasn't much going on with [reform]. ... School districts won't do anything unless you put dollars [out]. I was under the impression that many school superintendents would do good things because it was good for children. Well, that's not necessarily the case. School superintendents are not, and never have been, particularly reflective. I don't think that they have been great educational leaders. (Bemis)

Bemis was most proud of his involvement in the initiatives which became part of PA 25 - the largest single package of reforms to that time. They truly reflected his perspective about the necessary relationship between the state and the local districts; each reform was tied to a financial incentive for compliance, or a penalty for failure.

At the time of his interview, Dr Robert Schiller had served less than two years as state superintendent. He observed that the Michigan 2000 initiative and PA 25 were implemented before he arrived, and "My role has been very clearly from the start to take the package and make it work. Implement it or reshape it where I thought best." Commenting about the nationwide focus on school reform, he said it caused "...legislators to borrow and copy from each other's states, those kind of external initiatives which would push, shove, cajole and drag school districts into doing things somewhat differently." (Schiller) He was critical of the implementation of PA 25. "It's those

financial incentives on the per-pupil basis that have really served to be **disincentives** to school districts, as well as served to make PA 25 a **compliance** activity rather than an organic kind of growth opportunity for school districts." (Schiller) He felt that, under his administration, the state had tried to increase the capability of local school districts to be innovative, flexible, and try to improve within a framework. He felt that once local districts had fully implemented the provisions of PA 25 (due in 1997), that districts should be free to turn their energies toward internal improvements. He said, "I'm trying to get the state to walk away from externally hurled initiatives or changes. Rather, where at least I'm trying to drive it, is that there are no new initiatives that would externally move schools." (Schiller) Yet, only six months after he made this statement, the Michigan legislature passed the package of PA(s) 335, 336 and 339 which contained over 70 'externally hurled' initiatives. Like Bemis before him, Schiller never established his place in the state educational bureaucracy and was never able to exert much influence on its agenda. Within 18 months he left his position and Michigan.

Contrast the perspectives of the four state superintendents discussed above, and their statements of what they were trying to accomplish for local districts through reform efforts - with the responses of local superintendents discussed in Chapter Four. What can explain the difference between what was intended by Lansing and what occurred locally?

A Framework for Explanation

Legislation intended to free local superintendents to spend more time on improving instruction has actually increased the bureaucratic burden of superintendents, central office

personnel and other administrators. Laws meant to foster site-based decision-making have contained so many details and regulations that fewer choices are left to decide at the site. Reforms designed to improve student achievement have, so far, produced few measurable results. Laws meant to increase openness, trust and greater citizen involvement with the local schools have generally produced none of those outcomes. The MEAP tests designed to pinpoint needed help for individual students have become a major tool for comparisons between districts, and both the marketing and criticism of individual districts. A major restructuring of public school funding has left huge differences in the amount of funding between districts; and contained so many conditions that much of the good effect has been diluted. Legislation designed to free local districts to become more efficient and effective has instead required the locals to hire more people to monitor compliance and file reports to the state. (See Appendix F)

How could this happen? How could there be such a difference between what was intended and what has occurred; between what was promised in Lansing and what could be delivered locally? The following framework attempts to answer those questions.

There appears to be a fundamental difference between the ideal view of the world that exists in the perceptions of the members of the state educational bureaucracy, and the constraints of the real world in which local superintendents and districts have to operate. The architects of educational policy and regulations in Lansing - the Legislature, Governor, State Board of Education and State Superintendent - have an ideal vision of how public schools should be. This is evident in the policy statements, goals, documents, speeches and legislation which issue from those bureaucracies. There are, arguably,

several explanations for this perspective. One explanation is the genuine concern of public officials to improve the quality of schools for which they have a major responsibility. The leadership must set the tone and the expectations. Another explanation is what may be called "wishful thinking." Schools need to improve; Lansing has the power to order improvements; new legislation or regulations may correct the problem. A third explanation is the political expediency and profit which attaches to officials who demand that schools improve. Politicians cannot help but note that, ever since A Nation at Risk was published in 1984, education reform has been a proven vote-getter both locally and nationally for those candidates who push hardest for public school improvement. Whatever the motives, state officials truly believe they know best how to bring about that improvement.

On the receiving end of school reforms are the local superintendent, local board of education, other administrators, teachers and support staff, and parents and citizens who must change and accommodate, re-train and restructure - in order to fit the idealized reform visions into their very real world. In contrast to the Lansing perspectives mentioned above, the local superintendent has limited power to initiate reforms and limited opportunity for input and feedback concerning the reforms being planned. Superintendents can appreciate the legitimate responsibility to improve schools that is felt by state officials; as appointed local officials, they have a similar responsibility - and it's focused more directly on them. Superintendents are less inclined to rely on the power of "wishful thinking" as a solution. Local superintendents know that student achievement, staff re-training and public involvement are examples of human behavior. And human

behavior changes don't occur quickly through legislation, they occur more slowly and through re-education. Superintendents report that it's difficult to effect behavior changes as quickly as state officials apparently wish. Finally, superintendents lack the political motives that may attach to some reform efforts. As un-elected officials, the content and timing of their improvements are not dictated with an eye to the next election. Certainly, they need to tailor their improvement activities to the needs and demands of their district in order to assure their effectiveness and continued tenure. They would be foolish to ignore that element. But superintendents report that the major pressures for reform come from the state, not locally.

In this study there were repeated examples of this split between the ideal view of schools from Lansing and the reality of the local district. The legislature has an idealized vision that local citizens want to be heavily involved in their schools, attend lots of open meetings and receive detailed published reports. But that's apparently not what citizens or parents have time for; superintendents report that few people attend hearings, documents go unread and that it's difficult to get citizens to commit the time to become truly involved in the schools. Most people are too busy with the demands of their lives to become more involved. They're satisfied if the local schools seem to run smoothly, students learn, the budget is balanced, discipline is firm, and the sports teams and band look good.

School funding is another example of the gap between the idealized view of schools and the reality. During the entire 25 years examined in this study the funding formula for Michigan public schools resulted in tremendous differences in per-pupil revenues between districts (ranging from $3800 - $10,400 in 1993). The legislature

professed to recognize the inequity, tinkered with annual adjustments (see Appendix E) and felt that it was all they could do. But they could never muster the political will to eliminate the inequity. In the real world of the local districts, the effects of the inequity were always obvious and consequential, especially for the daily life and future prospects of the students. The small increases in the state aid formulas were readily accepted. But the state consistently failed to address the inequity issue for 25 years.

Even the shift to school funding under Proposal A retains the difference between the ideal view of Lansing and the local reality. Under Proposal A the gap between per-pupil funding in rich and poor districts will gradually decrease, and theoretically disappear within 20 years. The ideal view in Lansing is that this timetable is acceptable; many politicians claim credit for their role in passing Proposal A. But the local reality is that, if your children attend school, now, in one of the poorer districts - promised equity within 20 years is meaningless to you and your children. You want equal educational opportunity for your children - now.

A final illustration of the difference between the idealized view of state officials about how schools work and the reality of the local district concerns the reforms, and especially the vacillations within reforms, which depend on changes in human behavior.

Two examples of this practice were frequently mentioned by superintendents; one was the high school proficiency test involving both students and teachers, and the other example concerned administrator certification. Public Act 25 (1990) required the graduating class of 1997 to take, beginning in their junior year, a high school proficiency test which would demonstrate their mastery of certain subject areas in order to obtain an

"endorsed" diploma. This would, in turn, require a significant restructuring of the high school curriculum; part of the selections used to test language arts proficiency, for example, had to come from other departments in the school. So the teacher inservice and the student anxiety began. In the next five years the HSPT requirement was announced as rescinded or reinstated at least five times. On each occasion the inservice for staff and the preparation for students stopped or started accordingly. In Lansing's view, these changes should have little effect on the local schools; whatever the latest decision was ..."just do it." The local effect was devastating. Teachers saw their earlier work put on the shelf. Faculty teams disbanded and members went on to other assignments. The effect on students, especially the class of 1997, was surely destructive. Students and their parents were told how critical the test was to their acceptance by colleges and employers, then told the test was canceled, then told is was reinstated, etc.

Another example of Lansing's vacillation on behavioral change concerned certification. PA 163 (1986) established certification for administrators, with a continuing education requirement for renewal. (An accompanying requirement for practicing teachers was defeated by MEA pressure, but stiffer certification for new teachers became effective in 1991.) So all Michigan administrators, and potential administrators, pursued certification. In 1993, the state dropped the certification requirement; perhaps to assist the administration of charter schools. In 1994, the state resumed new certification on a voluntary basis only, but retained the renewal requirement for certificate holders. In 1996, the legislature again dropped certification requirements, stopped issuing even voluntary certificates - but still retained the recertification requirements for previous holders.

In the real world the decision to pursue administrator certification requires a substantial personal, family, employer and financial dedication. And, regardless of the state's requirements, many local school boards require certification because of the professional preparation it represents. The vacillation of Lansing in this matter has complicated the pursuit of certification by many potential administrators and perhaps discouraged others from even trying. So Michigan now requires no certificate or educational preparation to become a public school administrator, even for a superintendent. All other states in the United States require preparation and certification. In Lansing's idealized view this is a measure of school improvement, but it would be difficult locally to convince parents and citizens that their schools will operate better with an untrained chief executive.

How does this change or affect the role of the local superintendent? From the viewpoint of local superintendents, Lansing is stuck in its view of the ideal world and so it continues to pass laws to make that world exist. But the local superintendent lives in the real world and the ideal legislation bumps into the real problems of implementation. This causes superintendents to go through a lot of communication, coordination, explanation and reporting that they know is meaningless. Superintendents become suspicious of state officials who are so obviously out of touch with the real world of local schools. And state officials are suspicious of superintendents who won't do what they're told to do and therefore (since Lansing's view is the correct one) superintendents are seen as resistant to school improvement and reform. When viewed within the framework of the differences

between the idealistic view of state officials and the realistic view of local superintendents - and the mutual suspicion that those different views generate - the responses of the superintendents in this study do explain the findings that emerge from the data.

It should be noted that not all reforms generated suspicion or a profound difference of views between state officials and superintendents. Superintendents supported the equity intent of Proposal A, even though the reality fell short. Many curriculum reforms will probably increase student achievement, although it's probably too soon to measure those gains. And several personnel reforms, particularly criminal records checking and drug testing, are for the protection of students. These represented situations where the Lansing view of schools and the local reality were not that different.

Blumberg Revisited

In 1983, Blumberg interviewed 25 local superintendents in upstate New York for the purpose of describing the role of the superintendent. The study was concluded the year before A Nation at Risk was published, and before the state and national focus on public school reform which followed. For that reason it offers a basis for measuring if, and how, the role may have been affected since that time. Blumberg's major theme was that the "essential meaning of the superintendency as a type of work ...could not be grasped unless the role could be viewed through a lens that focused on its unavoidably conflictual nature." He concluded that superintendents must interact and deal with large numbers of situations over which they can exert no direct control. Much of their work life

is unpredictable. The role involves a high degree of stress, particularly because of certain inherent situations which superintendents face; specifically relationships with the media, dealing with incompetent teachers and budget planning. Relations with the school board and employee unions were a special source of conflict and tension. And superintendents must become politically active for them and their districts to survive.

The findings of the present study indicate that most of Blumberg's conclusions are still accurate a decade later, although some of the details and sources of conflict have changed. The role is still filled with conflict, stress and unpredictability. The effect of state reform efforts has increased the number of situations over which the superintendent can exercise little or no control. The focus on school improvement and the inevitable comparisons between districts has increased the importance of media relationships. School boards and superintendents have probably come together as they jointly work to implement state refroms; the board relies heavily on the superintendent to keep the district in compliance. The barrage of reforms in general, and the effects of PA 112 in particular, have seemed to reduced the conflict with unions. The incompetent teacher is still an inherent problem; several superintendents discussed this specifically. And the need for the superintendent to be politically active was well documented in this study.

The one aspect of the role which has unquestionably changed in the last decade - certainly in the last 25 years - is the emergence of the State as the major source of conflict and frustration for the superintendent, and the major influence for change in the structure and operation of the local district. That was not a finding in Blumberg's study - which concluded a year before the publication of A Nation at Risk. In Blumberg's study, all the

major sources of conflict and frustration for the superintendent, and change for the district, were local (i.e., the Board, unions, parents, unruly students, the business community, churches, etc.). By contrast, any current study would identify the State as a major influence on the superintendent and the district. And, according to the four state superintendents interviewed for this study, most states are even more centralized than Michigan.

Recommendations for Further Study

The researcher has described and explained the state reform efforts that have taken place during the past 25 years and how they have affected the role of the local superintendent and the structure and operation of the local district. During the preparation of this dissertation several other areas for potential study occurred to the researcher, and the conclusions of this study may suggest other opportunities for research. They are:

1. This study was based on the perceptions of local superintendents, but other perceptions are worthy of study. The perceptions of governors, legislators, school board members, or teachers concerning the impact of the state reform efforts could be studied.

2. Superintendents expressed the belief that many curriculum reforms would indeed produce an increase in student achievement - but it was too soon to tell. Research in a few years could provide an answer.

3. Likewise, Proposal A is intended to close the gap between rich and poor districts and provide financial equity for the education of each Michigan student. Future research could indicate if that is really occurring.

4. Reforms have required strategic plans, goals, three-to-five year plans, site-based decision-making and streamlining of the School Code - all meant to facilitate local school improvement without needless state interference. A future study could indicate whether this occurred.

Afterword

In the preceding dissertation I've tried to accurately capture the mood and perspective of Michigan public school superintendents as they attempt to operate in the current environment of state school reforms. The data used in the research were the responses of those superintendents, the analysis of those responses produced the common themes which emerged from the research, and the conclusions were written solely from the perspective of the local superintendent. However, if I step back from my own roles as a researcher and a local superintendent - other observations and explanations emerge. Here, I want to briefly discuss four of those observations.

First, the explanation that Lansing officials live in an idealized world while local superintendents operate in an environment of reality - is a local superintendent's point of view, and probably too narrow in its perspective. A fairer explanation might be that Lansing officials also live in their own world of reality; but one which differs greatly from that of local superintendents.

Perhaps another way to describe the difference between these worlds is to suggest that Lansing officials operate from a universalistic perspective; that of determining public education needs and remedies in Michigan. Local superintendents, however, operate from a particularistic viewpoint which is focused on the delivery of education, under those conditions and restrictions imposed by the state, in their particular schools and community.

Even though legislators also represent specific communities or areas, legislation can only be enacted by a majority. Therefore, reform measures tend to address situations in which a majority of legislators recognize the need for change, and in which a majority of Michigan students will presumably benefit from the reform. That is the reality of their world.

A local superintendent, however, is primarily concerned with the effects of any reform measure on his or her local district - not the statewide effect. The local superintendent is the person responsible for communicating the reform to others, gathering resources, assigning tasks, evaluating the results and reporting compliance to the state. And, because circumstances differ from one community to another, a given reform measure may produce different results in different districts - and may not even be needed. The particularistic concern of a local superintendent is "what will the reform do for, or to, my district?" That is the local reality.

Second, the research (again analyzed from the superintendent's perspective) may create the impression that local superintendents usually have a clear picture of the needs of education and the consequences of reform measures - and that it is state officials who are out of touch. But that is not true. Taking the broad view, another conclusion is that local superintendents vary widely in terms of their understanding of, and competence in, implementing educational reforms - and this variation in ability may affect how well their districts respond to reforms. Superintendents, arguably, require different skills and attitudes to survive in today's environment of reform than their predecessors possessed.

But the criticisms by superintendents about reforms may be, in part, only a reflection of their own incapacity for, or resistance to, change. Legislators and other state officials also range in ability from competent to poor, just like superintendents. But the development of education reforms was the product of large numbers of officials and any shortcomings of individuals tend to be overshadowed by the larger work of their groups. However, the shortcomings of a local superintendent are visible to all, and will probably affect everything the district does in its effort to implement reforms.

Third, another broad-perspective finding is that the motives of state officials deserve more credit than they often received at the local level. Most school reform measures attempted to produce equity (in the broad sense of the term) for Michigan students. By equity I mean greater opportunity, safety, funding, recognition, etc., for children. Arguably, the local impact of many reform measures made them appear to be heavy handed, insensitive, thoughtless or naive. But those were usually unintended consequences. Few, if any, of the 208 reforms measures identified in this study were thought to harm or punish children, although that occasionally occurred. Almost every superintendent interviewed could recite an anecdote about a reform which backfired, but the common motive behind most state reforms was to improve conditions and opportunities for Michigan students.

Fourth, so many of the superintendents' responses focused on how busy and difficult their work environment has become that it would be natural to conclude that this

phenomenon was somehow unique to public school administrators. The broader perspective is that their experience is **not** unique. The work environment of the superintendent, other administrators, and other central office personnel has, without question, become more difficult in the era of state reforms. The efforts to comply have required more paperwork, more communication, more leadership and different skills and attitudes - and often with less money, personnel and other resources available.

However, the same forces which have affected public schools during the past 15 years have similarly affected most other sectors of our society. New technology, downsizing, dwindling resources, more government regulation, increased public scrutiny and retraining of employees are issues faced by the CEO of any major organization - not just public school superintendents. Therefore, I believe the demands on today's superintendents, while substantial, are no worse than the demands on many other professional managers.

APPENDICES

APPENDIX A

UCRIHS APPLICATION

APPLICATION FOR APPROVAL OF A PROJECT INVOLVING HUMAN SUBJECTS
INITIAL REVIEW

UCRIHS - Michigan State University
David E. Wright, Ph.D., Chair
232 Administration Building
East Lansing, MI 48824-1046
(517) 355-2180 - Telephone . . . (517) 432-1171 - FAX
Office Hours: M-F (8:00 A.M.-Noon & 1:00-5:00 P.M.)

DIRECTIONS: Please complete questions on this application using the instructions and definitions found on the cherry sheets (revised Februrary 1995).

1. **RESPONSIBLE PROJECT INVESTIGATOR(S)** (Faculty or staff supervisor)

   Dr. Philip Cusick
   Faculty ID#: _____
   (Social Security #)
   I believe the research can be safely completed without endangering human subjects. Further, I have read the enclosed proposal and I am willing to supervise any student investigators.

   _____
   (Signature)

   ADDITIONAL INVESTIGATOR(S)

   Wayne L. Peters
   Fac./Stu. ID#: A02110932
   Fac./Stu. ID#: _____
   Fac./Stu. ID#: _____
   Fac./Stu. ID#: _____

2. **ADDRESS** (for comments/approval letter)

   Dr. Philip Cusick
   410 Erickson Hall
   MSU
   East Lansing, MI 48823
   Phone #: 517-355-4539
   FAX #: 517-353-6393

   ADDRESS (for comments/approval letter)

   Wayne L. Peters
   11526 Milford Rd.
   Holly, Michigan 48442
   Phone #: 810-634-4431
   FAX #: 810-634-2883

3. **TITLE OF PROPOSAL** The Effects of State Reform Efforts on the Role of the Local Superintendent and the Organizational Structure of Public Schools

4. **PROPOSED FUNDING AGENCY (if any)** None

5. **DOES THIS PROJECT UTILIZE AN INVESTIGATIONAL DRUG, DEVICE OR PROCEDURE?** Yes [ ] No [X]: If yes, is there an IND #? Yes [ ] _____ No [ ]

6. **DOES THIS PROJECT INVOLVE THE USE OF MATERIALS OF HUMAN ORIGIN (e.g., human BLOOD OR TISSUE)?** Yes [ ] No [X]

7. **DOES THIS PROPOSAL HAVE AN MSU ORD NUMBER?** Yes [ ] # _____ No [X]

8. **WHEN WOULD YOU PREFER TO BEGIN DATA COLLECTION?** 1-1-96
   Please remember you may not begin data collection without prior UCRIHS approval.

9. **CATEGORY** (Circle A, B or C below. See instructions.)
   a. This proposal requires review by a full sub-committee.
   b. This proposal is eligible for expedited review. Specify category or categories 2H, 2I.
   c. This proposal is exempted from full sub-committee review. Specify category or categories _____.

OFFICE USE ONLY
Subcommittee _____ Agenda _____

10. PROJECT DESCRIPTION (ABSTRACT)

The purpose of this study is to determine the effect of the State reform efforts on the role of the local superintendent and the organizational structure of local public schools. The researcher will conduct and analyze taped interviews with 30 Michigan public school superintendents. The researcher postulates that by assessing the impact of specific State reform efforts that were not in place twenty-five years ago, the researcher can determine if and to what degree the role of the local superintendent and the structural organization of public schools has changed.

To establish a foundation for this study, a research investigation into the past twenty-five years of State reform efforts was completed. The philosophical basis, the development of the reforms, and the administration and impact of these reforms were then described and in some cases analyzed by the past four State superintendents.

Two frameworks of reference were established as a foundation for analysis for the purpose of this study. First, the understanding of role in an organizational structure and second, the principal characteristics of structural organization as they correlate to public schools. Five areas of role and leadership responsibilities were correlated with the literature on role and structure. These five areas were: communication, finance, personnel, administration, and curricula. Second, organizational structure was defined by established theoretical research and five categories were identified for analysis. The five areas of structure were: hierarchy of authority, division of labor and specialization, rules and regulations, employees hired on the basis of qualification, and efficiency.

Two sets of exploratory questions, one for role and one for organizational structure of schools formulated the basis for the hypotheses of the study: one, State reform acts have had a significant impact on the role of local superintendent and two, State reform acts have had a significant impact on the organizational structure of local public schools.

The researcher then analyzed the role responsibilities associated with the over 200 State reform efforts. The reforms were matched with the five areas of role responsibilities and specific reforms were used as points of reference for each section of the questionnaire.

The reason for choosing local, public school superintendents to interview is because they are directly impacted by the State reform efforts and can best analyze the reform efforts impact on their own job responsibilities and the organized structure of public schools.

10. **PROJECT DESCRIPTION (ABSTRACT)**

SEE ATTACHED

11. **PROCEDURES**

SEE ATTACHED

12. **SUBJECT POPULATION**

a. The study population may include (check each category where subjects may be included by design or incidentally):

Minors	[ ]
Pregnant Women	[ ]
Women of Childbearing Age	[X]
Institutionalized Persons	[ ]
Students	[X]
Low Income Persons	[ ]
Minorities	[X]
Incompetent Persons (or those with diminished capacity)	[ ]

b. Number of subjects (including controls) 30 minimum

c. If you are associated with the subjects (e.g., they are your students, employees, patients), please explain the nature of the association.

Some of the local public school superintendents are colleagues.

d. How will the subjects be recruited?

The subjects will be asked to particpate in the interviews. The study has received the support of the Michigan Association of School Administrators.

e. If someone will receive payment for recruiting the subjects, please explain the amount of payment, who pays it and who receives it.

N/A

f. Will the research subjects be compensated? [X] No [ ] Yes. If yes, details concerning payment, including the amount and schedule of payments, must be set forth in the informed consent.

g. Will the subjects incur additional financial costs, as a result of their participation in this study? [X] No [ ] Yes. If yes, please include an explanation in the informed consent.

h. Will you be advertising for research participants? [X] No [ ] Yes. If yes, attach a copy of the advertisement you will use.

i. Will this research be conducted with subjects who reside in another country or live in a cultural context different from mainstream US society? [X] No [ ] Yes.

(1) If your answer is yes, will there be any corresponding complications in your ability to minimize risks to subjects, maintain their confidentiality and/or assure their right to voluntary informed consent as individuals? [ ] No [ ] Yes.

(2) If your answer to i-1 is yes, what are these complications and how will you resolve them?

11. PROCEDURES

1. Historical Perspective: The interviews of the four former State Superintendents

These interviews were used for the background research and developed the foundation of the study. The initial research investigation proved that much of the State reform efforts were initiated directly by the State superintendents, from their subordinates, or politically through the various channels of State government. The investigation further proved that little historical information or documentation was written with regard to the reform effort initiative, therefore the stories of the reform movements were in the memories of these State officials. Permission from these four Superintendents were given before each interview and the documentation of their comments have had their review and permission to publish their quotations.

2. Interview Participants: Local Public School Superintendents

Taped interviews of at least one hour will be conducted with 30 Michigan public school superintendents. Participants will receive a typed transcription of their interview and an abstract of the findings at the conclusion of the study. Participants will be selected from multiple counties and Intermediate School districts in Michigan.

13. ANONYMITY/CONFIDENTIALITY

1. The subjects identities and their responses to the interview questions will be kept confidential by:

   A. During the data collection only the researcher will have access to the information.
   B. The only access to the data collection will be from the researcher after the completion of the disseration.

14. RISK/BENEFIT RATIO

1. Risk of subjects identity could be the only personal concern on the part of the subjects.
2. Benefit of Project:

   a. The data will provide state legislators, governor, State superintendent, State Board of Education, boards of education, local superintendents, and t. general public the effects of the past 25 years of State reform efforts on th local schools and the local superintendent.
   b. For the superintendent it will provide an analysis of his/her time, job stres career impact, and health to meet state requirements.
   c. Cost factors, man hours, and extra personnel needed to meet state requirements.
   d. The overall effect on student and school personnel by meeting the State performance requirements.
   e. The effect on the organizational structure of the local schools by meeting these State requirements(i.e.: management, community relations).

15. CONSENT PROCEDURES

SEE ATTACHED CONSENT FORM

Is your application COMPLETE? Please SEE the CHECKLIST on page four of the UCRIHS Instructions.

APPENDIX B

UCRIHS CONSENT FORM

MICHIGAN STATE UNIVERSITY

Study of the Effects of State Reform Efforts on the Role of the Local Superintendent and the Organizational Structure of the Local District

*

CONSENT FORM

I _____, agree to participate in an interview with Wayne L. Peters for the purpose of discussing the above research topic. I understand that my name will not be used, and that all identifiable research information will be kept confidential.

I understand that the interview will take no more than one hour to complete. and that I may refuse to answer any of the interview questions or terminate the interview at any time. I understand that no information I give may be used to harm me in any way.

I understand that the interview will be recorded on audio tape, and that my responses will be transcribed in an accurate and confidential manner. If I so request. I will be furnished with a copy of the transcribed interview.

I understand that the information from the interview will be incorporated in the data being gathered by Wayne L. Peters for this research project. and that I may contact her at any time with questions about this study.
*

I understand the conditions of the interview and I freely consent to participate.

_____ _____

Participant Date

_____ _____

Researcher Date

* 1-810-266-4881 (work)

APPENDIX C

INTERVIEW QUESTIONS

Superintendent Interview Format Wayne L. Peters

Introduction: I'm speaking to _____, Superintendent of _____. First, I'd like to ask some background questions about you and your district. How long have you been superintendent here?

Q: Is this your first superintendency? What other positions did you hold?

Q: Would you briefly describe your district in terms of its size, geography and people?

Concerning Role Demands:

Q: How did you come to be a superintendent? What made you decide to do that?

Q: What did you think the superintendency would be like?

Q: Has it turned out to be what you thought it would be?

Q: How has it changed from past years? How is it changing now?

Q: Can you explain those changes? What's causing them?

Q: What's the hardest thing you have to do in your position? What is the biggest problem that you face? Is it an increasing problem?

Q: What are the major influences on your role? Is it teachers, the community, the Board, the State?

Q: How do you respond to the demands on you?

Q: Who or what really sets your agenda? Who do you really work for? Who do you have to satisfy to successfully perform your role?

When the participant mentions Reforms and the State:

Q: In what way does the State have an influence on your role? How is it changing your role from what it was in the past?

Q: With over 200 reform laws enacted by the state, how do you feel the organizational structure of your district has been altered?

Q: In what ways have the state reforms impacted the hierarchal structure of your district: For students? For teachers? For support staff? For the administration? For the community?

Q: How are the State's funding changes affecting your district?

Q: What State reforms have been good for your district, or for students?

Q: What particular reforms have been ineffective, or bad for your district?

Concerning the effects of the reforms on your district:

Q: Considering all the reforms dealing with communications and openness to the public (ie. the Open Meetings Act, the Freedom of Information Act, Annual Reports, etc.) - Do you think citizens feel more informed and trusting about their schools than before the reforms were passed?

Q: Many reforms required public budget hearings, Truth-in-Taxation hearings, publishing your annual financial statement in the newspaper, etc. Do you think this has caused the citizens to trust the financial management of the district more than before?

Q: Several reforms concern school personnel; such as criminal checks on applicants, random drug testing of drivers, offering jobs to long-term substitutes, etc. Has this improved the management of employees? Does the public have more confidence in school employees?

Q: Do you now try to hire employees with different skills than were needed in the past?

Q: Do you require veteran employees to develop different skills than they used to need?

Q: The State has enacted many curriculum reforms: such as core curriculum, proficiency tests, tougher MEAP tests, etc. Are these producing better students? Are teachers more effective because of these reforms? Are parents and employers more pleased?

Q: Do you think that administering a school districts is more complex than in past years? If so, in what way?

Q: With all the reforms that have come from Lansing, how is the relationship between the State and the local School Board changing?

Q: Does your Board sense a change in their power and authority, versus the State? If so, do they accept it? Or do they try to fight it?

Q: Do the Board and the Superintendent still have the greatest influence in the district?

Q: With all the recent reforms, who really governs public schools?

Concerning the effect of reforms on your role, and you personally:

Q: What effect has this reform activism had on you professionally? Does it give you more or

less satisfaction? Does it cause you stress? Or what?

Q: Has this reform climate changed your career outlook, or your plans, in any way? How?

Q: How about your colleagues; how have the reforms changed the outlook and career plans of other superintendents? Can you give examples?

Q: Has performing the role of the superintendent changed you personally in any way? If so, how? How do you deal with that?

Q: Knowing the scope of this research - are there any other observations you'd like to make concerning what it means to be a local superintendent these days?

Ending: Thank you for your participation in this study.

APPENDIX D

MICHIGAN REFORM EFFORTS

COMMUNICATIONS

PUBLIC ACTS, LEGISLATION, ETC.	TOPICS	DESCRIPTION	DATE
6 Step Accountability Model	Dr. Porter-Initiative Measure	6 steps to school reform: Goals, Objectives, Needs Assessment, Delivery System, Evaluation, and Report to Public	1968
P.A. 267	Open Meetings	Meetings must be posted for open attendance. Public Accountability.	1976
P.A. 442	Freedom of Information Act	Opens most school records of school open to public access.	1976
P.A. 202	Amendment to Open Meetings Act	Amends meeting act to allow personnel evaluations to be in private.	1984
P.A. 80	Hazardous Wastes	Required Schools to inform employees of any hazardous chemicals in work place.	1986
P.A. 25	Annual Report	Each district and building must publish annual report.	1990
P.A. 335	Annual Education Report	For schools to be accredited, school board must prepare an annual education report. Additions to previously required elements include core academic curriculum, variances from SBE	1993

		model and explanation of variances, plus how pupils are ensured enrollment for core academic curriculum.	
P.A. 335	Gender Equity	School board must ensure that data compiled for annual school report is disaggregated by gender and provided to people doing the annual school improvement plan. School board must ensure that gender equity issues are addressed or that explanation for not addressing those issues is made to community.	1993
P.A. 335	Performance Standards	Beginning July 1, 1996, school districts must consider SBE recommended pupil performance standards. Beginning July 1, 1997, for schools to be accredited, school board must establish performance standards for assessing and promoting students; school board must consider SBE recommended standards.	1993
P.A. 335	Site-Based Decision-Making	School board must ensure that decisions made at the school building level are made via site-based decision making process.	1993
P.A. 335	Sex Education Instruction	Permissive authority for sex education instruction must include teaching abstinence from sex as a responsible method of prevention unwanted pregnancy and sexually transmitted disease and as positive life-	1993

		style for unmarried young people. School board, before revising sex education materials or methods of instruction, must hold at least two public hearings.	
P.A. 336	Sex Education Instruction	To avoid forfeiture of State School Aid funds, school board must give parents advance notificationtion about sex education instruction, prior opportunity to review materials and observe instruction, and option for pupil to be excused.	1993
P.A. 283	Gender Equity	To avoid State School Aid forfeiture, school district must use data disaggregated by gender to develop its annual education report.	1994

FINANCE

PUBLIC ACTS, LEGISLATION, ETC.	TOPICS	DESCRIPTION	DATE
P.A. 451	Special Education	Special Education made mandatory Vocational Education Centers established funding and reimbursement.	1972
P.A. 258	Finance	Bursley equal yield plan or school aid act guaranteed a district the same basic revenue per pupil as any other district that levied the same same tax rate.	1973
P.A. 451	Finance	Any income over 3 1/2% of total family income was partially refunded.	1976
P.A. 451	Finance	Established 24 digit code for reporting all district revenues and expenses.	1976
P.A. 621	Budget & Accounting	Amends uniform Budget and Accounting Act to establish uniform procedures for preparation, adoption, and execution of school budgets.	1977
Voter Referendum and P.A. 35	Tax Limitation	Headlee Amendment to Michigan constitution. Limits school funding increase to C.P.I. unless voters approve otherwise.	1978
P.A. 94 State Aid Act	Finance	Established state aid format used through 1993-94. Membership aid + 3 categoricals in 1979	1979

		(transportation, special education, and under privileged students), grew to aid + 50 categoricals by 1993.	
P.A. 57	State Aid	State must continue same level of support to schools as before Headlee Amendment.	1979
P.A. 101	Curriculum	State must pay for any new mandated program created or expanded after Headlee.	1979
P.A. 211	Tax Collections	Requires city/townships to send tax collections to schools twice a month.	1979
Legislation	Fiscal Year	Fiscal Year changed from October 1-September 30 to July 1-June 30.	1979
P.A. 40	Lottery Monies	State lottery funds allocated to school aid fund (no actual increase, as equivalent General Fund money was taken away).	1981
P.A. 36	Residential Requirements	Requires students to attend the public school where parents/guardian resides.	1981
P.A. 78, 87, 127, 128, and 140	Recession Measures	1. Temporarily excused 10 troubled districts from the budgeting and accounting act. 2. Permitted districts to implement cost cutting measures and permitted schools to collect half their annual taxes in the summer. (Reduced borrowing costs.)	1981

		3. Permitted additional millage elections into December.	
P.A. 5	Truth & Taxation	School revenue can not increase even by C.P.I. without public hearing.	1982
P.A. 155	Revenue Taxes	Temporary increase in state income tax.	1982
P.A. 136	Recession Measures	Permitted five deficit districts to continue receiving state aid.	1982
P.A. 422	Recession Measures (Compensatory Education Benefits)	Provides formula to determine students eligible for compensatory education on MEAP scores.	1982
P.A. 16	Recession Measures (Borrowing Limits)	Allows schools to borrow beyond previous limits.	1983
P.A. 124	Recession Measures (State Loans)	Provides state loans to school districts (operating funds).	1983
P.A. 147	Recession Measures (Sale of School Land)	Allows local Boards to sell school land on land contracts.	1983
P.A. 229	Headlee (Redefined)	Establish post-Headlee state spending on schools at 41.61% of total state spending.	1984
P.A. 110	Incentives	Established the first financial incentives for local districts to adopt educational reforms. $28.00 per pupil for course offerings and	1985

		graduation requirements. Cap of class size (25) - $8.35 per pupil.	
Document	Goals 2000 "Deliver the Dream"	Technology grants part of the Goals 2000.	1988
P.A. 171	Computers of Tomorrow	State provided classroom computers and defaulted after one year - locals paid for remainder of costs.	1989
P.A. 25	State Aid	State Aid deductions for failure to implement P.A. 25.	1990
P.A. 148	Administrative Cost Incentive	$5.00 per pupil incentive for holding down administrative costs.	1992
P.A. 148	Incentives	District pays $50.00 per credit for high school seniors enrolled in college.	1992
P.A. 148	Incentives	Daily attendance requirement for state aid raised for 70-75%.	1992
P.A. 148	Incentives	Cancelled State Aid for funding of School of Choice.	1992
P.A. 336	Pupil Retention Report	To receive State School Aid funds, school district must furnish information on pupil retention rate to Department of Education.	1993

P.A. 335	At-Risk Students	School district must provide special assistance for at-risk pupils. District must avoid removing these pupils from core curriculum or regular classes to provide the assistance.	1993
P.A. 336	Adult Education	New criteria apply for district to receive State School Aid funds for adult education students.	1993
P.A. 335	Dual Credit and Enrollment	School district cannot unreasonably refuse credit for dual enrollment program operated by public university or community college or for course offered by independent college.	1993
P.A. 335	Professional Development	To receive professional development funds, each local district and ISD must have annual professional development plan approved by SBE New teachers (first 3 years) must: be assigned to "mentor" teacher, such as a master teacher or professor; receive professional development consistent with tenure requirements, plus classroom management and instructional delivery; and receive at least 15 days of professional development.	1993
P.A. 320	Security Task Force	School board may create a local school security task force.	1993
P.A. 335	Breakfast Program	First, Second, and Third Class districts must operate breakfast program, unless exceptions	1993

		apply.	
		School board cannot eliminate breakfast program without holding public hearing and publishing public justification report.	
P.A. 335	Master Teachers	P.A. 335 does not set qualifications for master teachers.	1993
		School district must provide sabbatical leaves for selected master teachers who aid in professional development.	
P.A. 59	Tenure; IDPs and Evaluations	School board must ensure that probationary teachers have individualized development plan and at least an annual year-end evaluation.	1993
		School board must ensure that tenured teachers are evaluated at least once every three years.	
		If tenured teacher's evaluation is not satisfactory, school district must provide individualized development plan.	
P.A. 60	Tenure Charges	If charges are filed against teacher, school board must decide whether to proceed within 10 days.	1993
P.A. 335	School Calendar	To avoid withholding of state school aid payments, school board must ensure in 1994-95 at least 180 days and 900 hours of pupil instruction; board must	1993

		consider extending the school year by 2 days each year to reach 210 days by 2009-1020.	
P.A. 336 and 283	Social Security	School operating costs include employer contributions for federal School Security and Medicare payments.	1993 1994
P.A. 336 P.A. 283	Retirement	School operating costs include district payments of Public School Employees' Retirement System.	1993 1994
P.A. 283	At-Risk Students	A school district receiving funds for at-risk students under the State School Aid Act must provide accountability report to Department of Education.	1994
P.A. 283	Early Childhood Education	A school district receiving State School Aid funds for early childhood education must meet SBE standards of quality and curriculum guidelines and establish a school readiness advisory committee.	1994
P.A. 283	Dual Credit and Enrollment	State school aid funds may be used for certain high school seniors enrolled in post-secondary, degree-granting institution. Local district must provide letter describing eligibility conditions by August 15. Intermediate school district must collect data and prepare dual enrollment report to department.	1994

P.A. 283	Professional Development	ISDs and constituent districts receiving State Aid funds for professional development must submit report to legislature.	1994
P.A. 283	School Calendar	Progressive increase in hours of pupil instruction: 990 to 1995-96 and 1996-97; 1,035 for 1997-98 and 1998-1999; and 1,080 for 1999-2000 and after; school board must certify days and hours by January 31 each year.	1994
P.A. 283	Financial Reports	To avoid withholding of State School Aid funds, school district must file timely audit of pupil and financial records, plus an annual comprehensive financial report, with Department of Education.	1994

PERSONNEL

PUBLIC ACTS, LEGISLATION, ETC.	TOPICS	DESCRIPTION	DATE
P.A. 332	Arrest Information Job Application	Prohibits schools from getting arrest information from job applications.	1975
P.A. 143	Pre-school Certification	Regulates licensing and teaching certification of pre-schools.	1976
P.A. 451	Special Education	Special Education made mandatory	1977
P.A. 90	Work Permits	Schools issue work permits to minors and differences in work conditions/hours for male and female eliminated.	1977
P.A. 397	Personnel Files	Allowed employees to know, review, and copy information in personnel files.	1977
P.A. 91	Retirement	Permits school employees to retire if age plus years of service equal 80 or 80+.	1985
P.A. 80	Hazardous Chemicals	Required schools to inform employees of hazardous chemicals in work place.	1986
P.A. 72	SubstituteTeachers	Substitute teachers working more than 120 days must be offered job the following year.	1986

P.A. 163	Administrator Certification	Establish certification of school administrators.	1986
P.A. 267	Teacher Certification	Requires new teachers (in 1991) to pass basic skills and subject matter tests to earn teaching certificate.	1986
P.A. 57	Teacher Certification	Allows hiring of non-certified Voc. Ed. teachers even if certified teachers are available.	1987
P.A. 503	Teacher Certification	Teachers may nullify subject area certificate to avoid subjects not presently current in.	1988
P.A. 193	Retirement	Encouraged retirement with 90% health benefits paid by state.	1989
P.A. 194	M.I.P.	M.I.P. plan enhanced pensions by additional 3% each year.	1989
P.A. 25	Teacher Certification	Districts can hire non-certified teachers in Science, Math and Technology in grades 9-12.	1990
P.A. 39	Legal Notification of Criminal Sexual Conduct	Prosecutors must notify Superintendent of employees charged with criminal sexual conduct.	1992
P.A. 99	New Employee	Requires criminal records check of newly hired employees.	1992
P.A. 59	Tenure; IDPs and Evaluations	School board must ensure that probationary teachers have individualized development plan	1993

		and at least an annual year-end evaluation. School board must ensure that tenured teachers are evaluated at least once every three years. If tenured teacher's evaluation is not satisfactory, school district must provide individualized development plan.	
P.A. 335	School Calendar	To avoid withholding of state school aid payments, school board must ensure in 1994-95 at least 180 days and 900 hours of pupil instruction; board must consider extending the school year by 2 days each year to reach 210 days by 2009-2010.	1993
P.A. 320	Security Task Force	School board may create a local school security task force.	1993
P.A. 335	Breakfast Programs	First, Second, and Third Class districts must operate breakfast program, unless exceptions apply. School board cannot eliminate breakfast program without holding public hearing and publishing public justification report.	1993
P.A. 283	School Calendar	Progressive increase in hours of pupil instruction: 990 for 1995-96 and 1996-97; 1,035 for 1997-98 and 1998-1999; and 1,080 for 1999-2000 and after; school board must certify days and hours by January 31 each year.	1994

ADMINISTRATION

PUBLIC ACTS, LEGISLATION, ETC.	TOPICS	DESCRIPTION	DATE
6 Step Accountability Model	Dr. Porter Reform Initiative Measures	6 Steps to school reform	1969
Document	Student Handbook	Students Rights and Responsibilities State Department of Education.	1970's
P.A. 180 P.A. 190	Handicap	Barrier free design for new school and access for handicap in present schools.	1974
P.A. 299	Immunization	Requires immunization of children before entrance to school.	1975
P.A. 451	Special Education	Special Education Act - made special education mandatory. Established Vocational Education Centers.	1976
Legislation	School Code	School Code rewritten first time in 50 years. (Included Update Material & Reorganization)	1976
P.A. 469	Data-Processing	MDE allocated $700,000 for automated data-processing services.	1977

P.A. 285	Immunization	Allowed schools to use immunization requirements as a condition for admittance.	1980
P.A. 104	Students	Required schools to screen students for scoliosis above 6th grade.	1981
P.A. 389	Calendar	Sets third Monday in January as Martin Luther King, Jr. Day - a commemorative vs. mandatory.	1984
P.A. 55	Safety	Limits school bus load to 110% of seating capacity.	1986
P.A. 147	Students	Requires containment or removal of asbestos from schools.	1986
P.A. 84	Students	Required information for new transfer students and tagging records of children reported missing.	1987
P.A. 128	Accountability	Michigan districts barred from using cars or chauffeurs for board members.	1987
P.A. 211	Weapon Response	Superintendent required to report student with dangerous weapon to police and student's parent/ guardian.	1987
P.A. 146	Building Lead-Free Plumbing	Requires lead-free plumbing for new or repair of school buildings.	1988

P.A. 215	Student Codes	Prohibits students from carrying pocket pagers and other electronic devices.	1988
P.A. 477	Student Codes	No payment to students for sports participation or college recruitment.	1988
P.A. 488	Confidentiality	Confidentiality of record of students with communicable diseases.	1988
P.A. 521	Corporal Punishment	Prohibits corporal punishment against students. Later modified by P.A. 6 of 1992.	1988
P.A. 748	Gasoline Storage Tanks	Requires clean-up of leaking underground storage tanks (gas).	1988
P.A. 30	Steroids	Prohibited use of steroids to and by students (possession and distribution).	1990
P.A. 72	District/State Control	Authorizes state to take control of financially troubled districts in emergency.	1990
P.A. 211	Abortion	Minors can petition probate court to seek an abortion without parent consent or knowledge.	1990
P.A. 335	Accreditation	School board must ensure each public school in district is accredited.	1993
P.A. 336	Pupil Retention Report	To receive State School Aid funds, school district must furnish information on pupil retention rate to Department of Education.	1993

P.A. 335	Performance Standards	Beginning July 1, 1996, school districts must consider SBE recommended pupil performance standards. Beginning July 1, 1997, for schools to be accredited, school board must establish performance standards for assessing and promoting students; school board must consider SBE recommended standards.	1993
P.A. 335	Site-Based Decision-Making	School board must ensure that decisions made the school building level are made via site-based decision making process.	1993
P.A. 174	Adolescent Clinics	Public health appropriations bill sets requirements for adolescent health clinics, including special provisions applicable when clinic is in school building. school board must approve policy for parental consent and services to be provided.	1993
P.A. 335	Portfolios	School district must maintain student portfolios for high school students.	1993
P.A. 336	Portfolios	To receive state School Aid funds, school district must maintain student portfolio for each high school student (includes eighth graders beginning 1994-95).	1993
P.A. 335	State-Endorsed Diploma	School Code requires school board to award state-endorsed diploma to eligible graduates. 1994, 1995, & 1996 Graduates: Specific	1993

		requirements for endorsement in communications arts, mathematics, or science. 1997 & 1998 Graduates: Graduate must achieve SBE academic outcomes in one or more of these: communication skills, mathematics, or science. 1999 Graduates: Graduate also must achieve SBE academic outcomes in social studies.	
P.A. 336	State-Endorsed Diploma	To receive State School Aid funds, school district must meet these same requirements as prescribed in State School Aid Act.	1993
P.A. 335	Fair Opportunity for Endorsement	School board must provide core academic curriculum, learning processes, special assistance, and sufficient access to each of these to give all pupils a fair opportunity to achieve a state-endorsed diploma. School board must provide meeting with parents, etc. for unsuccessful pupils. School board must provide special programs for unsuccessful pupils, unless board decides otherwise and publishes a public justification report.	1993
P.A. 335	Additional Testing for Endorsement	Pupils may repeat proficiency tests when school district regularly offers tests and MEAP according to state schedules.	1993

		Beginning in 1995, upon payment of reasonable fee any person may take state-endorsed diploma test and receive endorsement.	
P.A. 335	Dual Credit and Enrollment	School district cannot unreasonably refuse credit for dual enrollment program operated by public university or community college or for course offered by independent college.	1993
P.A. 335	Professional Development	To receive professional development funds, each local district and ISD must have annual professional development plan approved by SBE. New teachers (first 3 years) must: be assigned to "mentor" teacher, such as a master teacher or professor; receive professional development consistent with tenure requirements, plus classroom management and instructional delivery; and receive at least 15 days of professional development.	1993
P.A. 335	Master Teachers	P.A. 335 does not set qualifications for master teachers. School district must provide sabbatical leaves for selected master teachers who aid in professional development.	1993
P.A. 335	Student Teachers	Beginning July 1, 1995, before student teaching, individual must demonstrate certain skills and	1993

		knowledge to the satisfaction of the school or school district.	
P.A. 59	Tenure; IDPs and Evaluations	School board must ensure that probationary teachers have individualized development plan and at least an annual year-end evaluation. School board must ensure that tenured teachers are evaluated at least once every three years. If tenured teacher's evaluation is not satisfactory, school district must provide individualized development plan.	1993
P.A. 60	Tenure Charges	If charges are filed against teacher, school board must decide whether to proceed within 10 days.	1993
P.A. 337	Tenure; Academy Teachers	Tenured teacher on leave of absence from district to teach at a public school academy retains tenure with the district.	1993
P.A. 335	Administrators	Administrators need not hold administrator or or teaching certificate (Exception for ISD superintendents). Beginning 1995-96, administrators must complete SBE continuing education requirements.	1993

P.A. 68	Criminal History	Provision extended to include conditional hires. School board must request criminal history check before hiring teacher or administrator as conditional employee.	1993
P.A. 335	Student Rules and Discipline	Provision that school board must make reasonable regulations necessary for schools more broadly-stated and expressly permits dress codes. School board may designate principal to make suspension and expulsion decisions.	1993
P.A. 335	Sexual Harassment Policy	By January 1, 1995, school board must adopt and implement written sexual harassment policy, including penalties, for board members, employees, and pupils.	1993
P.A. 335	School Calendar	To avoid withholding of state aid payments, school board must ensure in 1994-95 at least 180 days and 990 hours of pupil instruction; board must consider extending the school year by 2 days each year to reach 210 days by 2009-2010.	1993
P.A. 320	Security Task Force	School board may create a local school security task force.	1993
P.A. 335	Breakfast Programs	First, Second, and Third Class districts must operate breakfast program, unless exceptions apply.	1993

P.A. 51	Asbestos	Asbestos-containing material cannot be removed from educational facility unless specific conditions apply.	1993
P.A. 362	Charter Schools	A local or intermediate school board may grant a contract for operation of a public school academy. If so, board has special, assigned responsibilities related to the academy. If local school board declines to grant charter, organizers of proposed public school academy may petition for election.	1993
P.A. 335	Consortia Programs	School board of district participating in consortia programs must ensure that P.A. 25 (as amended) requirements are met.	1993
P.A. 336 P.A. 283	Retirement	School operating costs include district payments of Public School Employees' Retirement System.	1993
P.A. 336 P.A. 283	Social Security	School operating costs include employer contributions for federal Social Security and Medicare payments.	1993 1994
P.A. 283	Suspensions and Expulsions	School districts must report data, including numbers, reasons, etc., to Department of Education within 90 days after school year ends.	1994
P.A. 283	Homeless Children	School districts must allow homeless children residing in the district to enroll.	1994

P.A. 32	Grade Change	A final exam grade or marking period, semester, or term grade cannot be changed unless there was no rational basis for the grade.	1994
P.A. 283	Dual Credit and Enrollment	State school aid funds may be used for certain high school seniors enrolled in post-secondary, degree-granting institution. Local district must provide letter describing eligibility conditions by August 15. Intermediate school district must collect data and prepare dual enrollment report to department.	1994
P.A. 283	School Calendar	Progressive increase in hours of pupil instruction: 990 for 1995-96 and 1996-97; 1,035 for 1997-98 and 1998-1999; and 1,080 for 1999-2000 and after; school board must certify days and hours by January 31 each year.	1994
P.A. 283	Professional Development	ISDs and constituent districts receiving State Aid funds for professional development must submit report to legislature.	1994
P.A. 283	Financial Reports	To avoid withholding of State School Aid funds, school district must file timely audit of pupil and financial records, plus an annual comprehensive financial report, with Department of Education.	1994

P.A. 8	Plant Lights & Scales	To receive lights for plant growth and scales confiscated under the Public Health Code, elementary or secondary school must submit written request to local municipality.	1994

CURRICULUM

PUBLIC ACTS, LEGISLATION, ETC.	TOPICS	DESCRIPTION	DATE
Legislation	MEAP	Performance based education testing Norm reference 1969/Criterion Reference 1971	1968- Leg. 1969-1st Testing
Documents	State Educational Goals	Common goals of Michigan Educational Advisory Committee to State Board. General Goals for Public School Education.	1971
P.A. 97	Vocational Education	Career Education Act	1974
P.A. 89	Consumer Education	Mandates Curriculum in Consumer Education	1974
P.A. 294	Bilingual Program	Mandated schools with 20 or more students to institute a bilingual program.	1974
P.A. 299	Gifted and Talented	State Board planning for curriculum of gifted and talented students.	1974
P.A. 353	Minority Curriculum	MDE requires curriculum on ethnic regulations, racial minorities, and contributions of women.	1974

P.A. 56	Vocational Education	Permits 2 or more districts with population more than 12,000 + students to establish Vocational-Technical Programs if no skill center exists.	1976
P.A. 415	Student Rights	Reduced discrimination in the State Competitive Scholarship Program.	1976
P.A. 451	Special Education	Special Education Act - made special education mandatory. Established Vocational Education Centers.	1/1977
P.A. 54	Student Rights	Permitted students to register at their schools to vote in elections.	1979
Document	Educational Goals	Revised common goals of Michigan Goals-included pre-primary - two areas: student learning and system responsibilities.	1979-1980
P.A. 109	Alternative Program	Allows alternative programs for expectant mothers (students) and school age parents.	1980
Document	Educational Goals	Nation at Risk - National U.S. Dept. of Education - comparison of students achievements of various nations. Significantly impacted states vision for educational reform.	1983
P.A. 239	Staff Development	Appropriates $2.7 million for local and ISD staff development.	1984

Document	Educational Goals	MDE published "A Blue Print for Action" Michigan response to Nation at Risk. Four areas of recommendation: 1. Improve learning, 2. Create learning environment, 3. Strengthening profession, 4. Delivering educational services.	1984
P.A. 5	Vocational-Technical Programs	Allows non-contiguous districts to establish Vocational-Technical programs.	1985
Document	Educational Goals	MDE - "Goals 2,000 - Education for a New Century". (Kindergarten graduating class of the year 2,000 would have the employability skills for the 21st century.) Establish desired outcomes and assigned actions to meet goals in nine areas of education.	1987
Document	Educational Goals	State Board publication"Michigan K-12 Program Standards of Quality." A self-assessment to establish local reform efforts.	1987
P.A. 18	Student Credit	Grants high school foreign language credit for sign language.	1987
P.A. 124	Low Income	Incentive for low income students to graduate from high school and receive two year tuition to community college.	1987
P.A. 185	Aids Curriculum	Mandates Aids topic be added to curriculum.	1987

P.A. 232	Student Grades Appeal	Provides for grade appeal to a five member committee - further appeal by teacher but not student or parents.	1988
P.A. 318	State Requirements	1. Calculate 7-12 drop out rate. 2. Give students employability tests. 3. Make adult education graduation requirements similar to high school graduation requirements.	1988
Document	Educational Goals	MDE -"Goals 2000 - Deliver the Dream" Establish educational areas for continued improvement over a two year period. i.e.: financial incentives for core curriculum, school improvement plan, pre-school plans, employability skills curriculum, communicable disease policy, and technology grants.	1988
P.A. 32	McGruff Child Watch Program	Schools/police may sponsor McGruff Child Watch Programs.	1989
P.A. 171	Computers of Tomorrow	State provides computers for the classroom. (State defaulted after one year and districts paid remainder of costs.)	1989
Document	Educational Goals	MDE - "Condition of Michigan Education" Statistical data from 1970-89 indicating educational trends in Michigan for students, outcomes, staff, finance, and management.	1989

P.A. 62	Dispute Resolution	Requires dispute resolution be added to curriculum.	1990
Document	Educational Goals	"Better Education for Michigan Citizens" Final status report on 1984 "Blueprint for Action" Identified progress made on 1984 recommendations.	1990
Document	Educational Goals	"America 2000" - Bush (Federal) An educational strategy, six national goals established for next ten years.	1990
Document	Educational Goals	"21st Century Education; Where the Next Century Begins". Established priorities for State Board for 1991-92 based on the federal "America 2,000" goals document.	1990
P.A. 25	State Mandate	1. Each district and school must have continuous school improvement process includes: a. Mission statement b. 3-5 year goals c. Building level decision making. 2. Core curriculum developed. With student outcomes, measurable via new MEAP testing and high school exit exam (proficiency). 3. Each school must start process for accreditation. 4. Institute state endorsed diplomas and student portfolios.	1990

P.A. 139	HIV Education	Mandates instruction of HIV virus	1991
P.A. 148	Incentives	High school seniors within 5 credits of graduation may enroll in college - district pay $50.00 per credit.	1992
P.A. 148	Incentives	Student portfolios and state endorsed diplomas become future requirements.	1992
P.A. 148	Incentives	District must list male and female interscholastic teams offered in past and present.	1992
P.A. 335	Annual Education Report	For schools to be accredited, school board must prepare an annual education report. Additions to previously required elements include core academic curriculum, variances from SBE model and explanation of variances, plus how pupils are ensured enrollment for core academic curriculum.	1993
P.A. 339	School Improvement Plans	School board must adopt and implement a 3- to 5- year school improvement plan and continuing school improvement process for each school in the district. Plan must be updated annually by each school and the school board.	1993

		Mandatory elements of plan differ for local districts and ISDs.	
P.A. 335	Accreditation	School board must ensure each public school in district is accredited.	1993
P.A. 335	Gender Equity	School board must ensure that data compiled for annual school report is disaggregated by gender and provided to people doing the annual school improvement plan. School board must ensure that gender equity issues are addressed or that explanation for not addressing those issues is made to community.	1993
P.A. 335	Core Academics Curriculum	For schools to be accredited, school board must make a core academic curriculum available to all pupils attending public school in the district. School board must determine aligned instructional program for delivering the core academic curriculum. 1994-97: School board must establish core academic curriculum at elementary, middle, and secondary levels. 1997-98 and after: School board must provide SBE required core academic curriculum to each pupil (SBE curriculum cannot include attitudes, beliefs, or value systems not essential to legal, economic, and social structure or to personal and social responsibility).	1993

P.A. 335	Performance Standards	Beginning July 1, 1996, school districts must consider SBE recommended pupil performance standards. Beginning July 1, 1997, for schools to be accredited, school board must establish performance standards for assessing and promoting students; school board must consider SBE recommended standards.	1993
P.A. 335	Educational Needs	School district must recognize and meet the educational needs for different learning environment required by a diverse pupil population.	1993
P.A. 335	At-Risk Students	School district must provide special assistance for at-risk pupils. District must avoid removing these pupils from core curriculum or regular classes to provide the assistance.	1993
P.A. 335	Early Elementary Initiatives	School board must consider early elementary initiatives such as nongraded programs, individualized planning, and student portfolios.	1993
P.A. 336	Adult Education	New criteria apply for districts to receive State School Aid funds for adult education students.	1993
P.A. 335	Communicable Diseases Instruction	Mandatory instruction about dangerous communicable diseases must include the teaching of	1993

		abstinence from sex as a responsible method of restricting and preventing these diseases and as a positive lifestyle for unmarried young people. School board, before revising curriculum, must hold at least two public hearings.	
P.A. 335	Sex Education Instruction	Permissive authority for sex education instruction continues, but if offered, the instruction must include teaching abstinence from sex as a responsible method of preventing unwanted pregnancy and sexually transmitted disease and as positive lifestyle for unmarried young people. School board, before revising sex education materials or methods of instruction, must hold at least two public hearings.	1993
P.A. 336	Sex Education	To avoid forfeiture of State School Aid funds, school board must give parents advance notification about sex education instruction, prior opportunity to review materials and observe instruction, and option for pupil to be excused.	1993
P.A. 335	Student Grades	Pupil's course grade cannot be based or determined in a manner unrelated to achievement of relevant objective criteria.	1993
P.A. 335	Portfolios	School district must maintain student portfolios for high school students.	1993

P.A. 336	Portfolios	To receive State School Aid funds, school district must maintain student portfolio for each high school student (includes eighth graders beginning 1994-95).	1993
P.A. 335	State Endorsed Diploma	School Code requires school board to award state-endorsed diplomas to eligible graduates. 1994, 1995, and 1996 graduates: Specific requirements for endorsement in communications arts, mathematics, or science. 1977 & 1998 graduates: Graduate must achieve SBE academic outcomes in one or more of these: communication skills, mathematics, or science. 1999 graduates: Graduate also must achieve SBE academic outcomes in social studies.	1993
P.A. 336	State Endorsed Diploma	To receive State School Aid funds, school district must meet these same requirements as prescribed in State School Aid Act.	1993
P.A. 335	Fair Opportunity for Endorsement	School board must provide core academic curriculum, learning processes, special assistance, and sufficient access to each of these to give all pupils a fair opportunity to achieve a state-endorsed diploma. School board must provide meeting with parents, etc. for unsuccessful pupils.	1993

		School board must provide special programs for unsuccessful pupils, unless board decides otherwise and publishes a public justification report.	
P.A. 335	Additional Testing for Endorsement	Pupils may repeat proficiency tests when school district regularly offers tests and MEAP according to state schedules. Beginning in 1995, upon payment of reasonable fee, any person may take state-endorsed diploma test and receive endorsement	1993
P.A. 335	Credit by Testing	Any high school student must be permitted to take final exam for any course; school board must grant credit to pupil who score C+ or better on final exam, even though pupil was not enrolled in the course.	1993
P.A. 335	Foreign Language Credit	School board must grant high school credit to pupil who demonstrates proficiency in a foreign language.	1993
P.A. 335	Dual Credit and Enrollment	School district cannot unreasonably refuse credit for dual enrollment program operated by public university or community college or for course offered by independent college.	1993
P.A. 335	Physical Education Credit	School board may accept participation in extra-curricular physical activities to meet physical education requirement.	1993

P.A. 335	Assessment Methods	School board must ensure use of a variety of criteria-based strategies to assess pupils.	1993
P.A. 335	Disability Accomodation	School district must provide accommodation to pupils with disabilities for purposes of taking proficiency and assessment attitudes.	1993
P.A. 335	MEAP; Values and Attitudes	School board cannot use MEAP to measure pupils' values or attitudes.	1993
P.A. 335	MEAP; Special Assistance	Apart from limited exceptions, pupils who receive unsatisfactory score on 4th and 7th grade MEAP tests must be given special assistance to improve.	1993
P.A. 335	Professional Development	To receive professional development funds, each local district and ISD must have annual professional development plan approved by SBE. New teachers (first 3 years)must: be assigned to "mentor" teacher, such as a master teacher or professor; receive professional development consistent with tenure requirements, plus classroom management and instructional delivery; and receive at least 15 days of professional development.	1993
P.A. 335	Multi-cultural Education	Beginning 1995-96, school board may develop and implement a curriculum for ensuring multi-cultural education at all grade levels.	1993

		If adopted, certain elements must be included in the curriculum.	
P.A. 283	Gender Equity	To avoid State School Aid forfeiture, school district must use data disaggregated by gender to develop its annual education report.	1994
P.A. 283	At-Risk Students	A school district receiving funds for at-risk students under the State School Aid Act must provide accountability report to Department of Education.	1994
P.A. 283	Early Childhood	A school district receiving State School Aid funds for early childhood education must meet SBE standards of quality and curriculum guidelines and establish a school readiness advisory committee.	1994
P.A. 283	Dual Credit and Enrollment	State school aid funds may be used for certain high school seniors enrolled in post-secondary, degree-granting institution. Local district must provide letter describing eligibility conditions by August 15. Intermediate school district must collect data and prepare dual enrollment report to department.	1994
P.A. 283	Professional Development	ISDs and constituent districts receiving State School Aid funds for professional development must submit report to legislature.	1994

APPENDIX E

STATE AID FORMULAS

STATE AID TO LOCAL DISTRICTS

Pre-1970's

* 60's - 70's

  State/local shared approximately equal for funding of schools.

* 66-67 (for example)

  Local 46.8% - property tax revenue

  State 47.7% - 4% sales tax and excise taxes

  Federal 5.5%

  100.0% Funding

* Problem of inequity was on the rise due to growth in suburban/urban areas and tax burden on local tax payers was increasing due to S.E.V. increases.

* 15 mill imitation - 1963 constitution (18 mill if voted by public).

* Regressive tax - burden on low income.

* Uneven quality of assessments.

* Distribution of State Funds:

a. General Aid - based on membership

b. Categorical aid - transportation, Special Education Aid for underprivileged.

280.50 per pupil - proceeds of tax of 50.3 M on S.E.V.

407.50 per pupil - proceeds of tax on 15.0 M. on S.E.V.

1978-79	$274.00	+	$40.00 per mill up to 30 mills
1979-80	$325.00	+	$43.00 per mill up to 30 mills
1980-81	$357.00	+	$46.24 per mill (no mill limit)
1981-82	$360.00	+	$50.55 per mill
1982-83	$328.00	+	$54.00 per mill
1983-84	$823.00	+	$59.00 per mill

1984-85 $300.00

+ 28.00 (graduation and high school class incentive)

$328.00 + $64.00 per mill

1985-86 $303.00

+ 28.00 (graduation and high school class incentive)

+ 8.35 (K-1 average class size incentive)

$339.35 + $68.50 per mill

1986-87 $304.00

+ 29.00 (graduation and high school class incentive)

+ 12.00 (K-2 average class size incentive)

$345.00 + $72.25 per mill

1987-88 $306.00

+ 30.00 (graduation and high school class incentive)

+ 14.00 (K-3 average class size incentive)

$350.00 + $75.10 per mill

1988-89 $306.00

+ 30.00 (graduation and high school class incentive)

+ 14.00 (K-3 average class size incentive)

$350.00 + $77.71 per mill

1989-90 $266.00

+ 30.00 (graduation and high school class incentive)

+ 14.00 (K-3 average class size incentive)

$310.00 + $83.61 per mill

1990-91 $266.00

+ 30.00 (graduation and high school class incentive)

+ 14.00 (K-3 average class size incentive)

+ 25.00 (quality incentive)

$355.00 + $90.00 per mill

1991-92 $266.00

+ 30.00 (graduation and high school class incentive)

+ 14.00 (K-3 average class size incentive)

+ 25.00 (quality incentive)

$355.00 + $94.38 per mill

1992-93 $268.00

+ 30.00 (graduation and high school class incentive)

+ 14.00 (K-3 average class size incentive)

+ 25.00 (quality incentive)

+ 5.00 (foreign language incentive)

$342.00 + $96.27 per mill

1993-94 In March, 1994, Michigan voters passed Proposal A which greatly reduced local property taxes for school operation, while raising the state sales tax and several use taxes.

Schools now receive an annual per-pupil grant from the state to pay for all district expenses - including those previously covered by categorical grants.

Taxpayers now pay six mills on homesteads and 24 mills on all other property, for school operations. The state sales tax increased from four to six percent. These monies go to the state for redistribution back to the schools. Debt millage is still collected and distributed locally.

APPENDIX F

REQUIRED STATE REPORTS

Appendix F

MICHIGAN DEPARTMENT OF EDUCATION
1989-90 SCHOOL YEAR LISTING
OF L.E.A. AND I.S.D. REPORTING FORMS

November, 1989

Michigan Department of Education
Information Services Center
P.O. Box 30008, Lansing, Michigan 48909
Telephone (517) 373-0433

NOTE: This is a listing of all LEA and ISD forms. However, you will receive ONLY the forms that pertain to your LEA or ISD.

DISTRIBUTION CODE: (Number indicates month distributed)
M -- Monthly Q -- Quarterly R -- Request Only V -- Variable

FORM NUMBER	TITLE OF FORM	CONTACT PERSON	TELEPHONE NUMBER	MONTH OF DIST.	ISD	LEA
ADULT EXTENDED LEARNING SERVICES						
AE-4078	Adult Education Annual Performance Report	Ken Walsh	373-8439	05	Y	Y
AE-4103	Project Proposal toApply for Federal Funds to Conduct Adult Basic Education Programs of Instruction	Ken Walsh	373-8439	05	Y	Y
AE-4469	Application for Annual Authorization to Teach Vocational Education	Richard Smith	373-3397	08	Y	Y
AE-4523	Application for Approval to Participate in the Partial Reimbursement of Salaries of Community School Directors or Coordinators Program	Ken Walsh	373-8439	05	N	Y
AE-4542	Request for Reimbursement of Salaries for Community School Program Directors and Coordinators	Ken Walsh	373-8439	05	N	Y
AE-4667	Notification of Consortium Agreement of Adult Education Programs	Ken Walsh	373-8439	05	N	Y
AE-4669	Project Proposal to Apply for Adult Education Special Experimental Demonstration Projects & Teacher Training	Ken Walsh	373-8439	12	Y	Y
AE-4691 A,B,C	Staff Development Collaborative Incentives Grant Funding (Application, Revision and Final Report)	Ken Walsh	373-8439	V	Y	Y
AE-4695 & A,B	Job Training Partnership Act Program	Richard Smith	373-3397	R	Y	Y
AE-4724	Request for Approval to Conduct Adult Education Programs in Mental Health Institutions and/or Nursing Homes	Ken Walsh	373-8439	05	N	Y

FORM NUMBER	TITLE OF FORM	CONTACT PERSON	TELEPHONE NUMBER	MONTH OF DIST.	ISD	LEA
DEPARTMENT SERVICES (Cont'd.)						
DS-4437	Application for Final Qualifications of Bonds	Richard Kelley	373-3344	R	N	Y
DS-4492-A	Financial Funding Report -- Request for Funds (green form)	Rick Bellah	335-0534	V	Y	Y
DS-4492-A	Financial Funding Report -- Expenditure Report (red form)	Dan Hanrahan	373-1963	Q	Y	Y
DS-4511 A	LEA: General Fund Budget	W. Kenneth Cool	373-0424	06	N	Y
DS-4511 B	Intermediate School District Budget Report for Fiscal Year	W. Kenneth Cool	373-0424	06	Y	N
DS-4511 C	School District Financial Plan for Eliminating a Deficit Budget	Wallace Beggs	335-0524	V	N	Y
DS-4513	Local District: Fiscal Year Indirect Cost Rate Adjustments	Robert Corlett	373-0424	02	N	Y
DS-4524	Intermediate School District: Indirect Cost Rate Application	Wallace Beggs	335-0524	02	Y	N
DS-4573	Application for Preliminary Qualification of Bonds	Richard Kelley	373-3344	V	N	Y
DS-4646	Non-Resident Pupil Count -- Adult Education Programs	Joellen Wonsey	373-3350	06	N	Y
DS-4738	Work Stoppage Attendance Report	W. Kenneth Cool	373-0424	V	Y	Y
DS-4848	General Fund Budgetary Control Report	W. Kenneth Cool	373-0424	V	N	Y
DS-4859	Adult Education Programs--Compliance with Section 107	Ken Walsh	373-8439	04	Y	Y
OFFICE OF GRANTS COORDINATION AND PROCUREMENT						
OG-4628	Application for Funding a Regional Educational Media Center-REMC	Carol Wolenberg	373-1806	07	Y	N
OG-4682	Application for Chapter 2, ESEA Public Law 100-297 Formula Grants Program	Paul Bielawski	373-1806	08	Y	Y
OG-4692	ECIA Chapter 2 School Year Evaluation Report Form	Paul Bielawski	373-1806	08	Y	Y
OG-4722 A	Computer Literacy & Educational Technology Grants Application	Marilyn Hunter	373-1806	08	Y	Y
OG-4722 B	Application for Partnerships for Education Grants	Elaine Gordon	373-1809	08	Y	Y
OG-4733	Discretionary Demonstration and Exemplary Grants Application for Elementary and Secondary Mathematics and Science Improvement Act of 1988	Paul Bielawski	373-1806	08	Y	Y
OG-4735	District Application for Teacher Mini-Grant	Marilyn Hunter	373-1806	08	Y	Y
OG-4810	Educational Innovation Grants Application	Marilyn Hunter	373-1806	09	Y	Y

FORM NUMBER	TITLE OF FORM	CONTACT PERSON	TELEPHONE NUMBER	MONTH OF DIST.	ISD	I.E.A
OFFICE OF SCHOOL AND COMMUNITY AFFAIRS						
SC-4081 A	Application for Alternative Education Program for Pregnant Adolescents, School Age Parents, and Their Children	Claudette Nelson	373-3260	12	Y	Y
SC-4081 B	Application for Comprehensive Model of Services to Pregnant Adolescents, School Age Parents, and Their Children	Claudette Nelson	373-3260	12	Y	Y
SC-4203	School Summary: Fourth Friday Student and Staff Head Count Report	Nancy Wing	373-3260	09	N	Y
SPECIAL EDUCATION SERVICES						
SE-4393	Federal Assistance for the Education of the Handicapped -- PL-89-313 Transfer Provision	Carol Regnier	373-2949	07	Y	Y
SE-4568	December 1 Special Education Count	James Nuttall	373-6488	11	Y	N
SE-4600	MDE Data Bank Listing of Deaf-Blind Students	George Monk	334-6605	01	Y	Y
SE-4625	Federal Assistance for the Education of Handicapped Persons	Carol Regnier	373-2949	04	Y	N
SE-4728	Special Education Communication Project Grant Application	Carol Regnier	373-2949	09	Y	Y
SE-4747	Request for Reimbursement for the Net Increase in Necessary Costs for Implementing the July 1, 1987 Special Education Rules for the School Year	Joe Gomez	373-6488	10	Y	Y
SCHOOL MANAGEMENT SERVICES						
SM-4012 SL	Claim for Reimbursement -- School Lunch, Breakfast, and Special Milk Program	Karen Jacobs	373-1074	M	Y	Y
SM-4012 A	Quarterly Report for School Lunch, Breakfast, and Special Milk	James Murton	373-2313	09	Y	Y
SM-4200	Application for Child Care Food Program	Peggy Pawelek Brown	373-7391	08	Y	Y
SM-4213 C	Claim for Reimbursement -- Child Care Food Program	Pamela Miller	373-7391	M	Y	Y
SM-4339	Driver Education Annual Report	Richard Claflin	373-3314	08	Y	Y
SM-4458 & A	National School Lunch Program/Commodity Distribution, Special Milk & Breakfast Programs: Application-Agreement	James Murton	373-2313	07	Y	Y

FORM NUMBER	TITLE OF FORM	CONTACT PERSON	TELEPHONE NUMBER	MONTH OF DIST.	ISD	LEA
SCHOOL MANAGEMENT SERVICES (Cont'd.)						
SM-4458-SC/SF	State Food Distribution and Special Milk Agreement -- Summer Programs	Mike Iribarren	373-2077	05	Y	Y
SM-4515	School Bus Driver Personnel Roster	Jan Jordan	373-3314	R	Y	Y
SM-4698	Motorcycle Safety Project	Tom Hampton	373-3314	09	Y	Y
SCHOOL PROGRAM SERVICES						
SP-4060	Application for Education of Children of Migrant Workers	Cecilia Santa Ana	373-0161	02/05	Y	Y
SP-4065	Application for Chapter 1 (P.L. 100-297)	Linda Brown	373-3921	05	Y	Y
SP-4065 A	Chapter 1 Project Budget Worksheet	Linda Brown	373-3921	V	Y	Y
SP-4065 B	Recapture Report	Linda Brown	373-3921	10	Y	Y
SP-4065 C	Application for Payment of Chapter 1 Capital Expenses for Services to Private School Children	Linda Brown	373-3921	05	Y	Y
SP-4065 D	Application for Funds for the Implementation of Chapter 1 School Program Improvement Plans	Linda Brown	373-3921	08	Y	Y
SP-4473	Distribution of Chapter 1 Eligibles	Linda Brown	373-3921	12	Y	N
SP-4549 A	Application for Section 48 Program	Linda Brown	373-3921	08	Y	Y
SP-4549 B	Section 48 Final Expenditure Report	Linda Brown	373-3921	08	Y	Y
SP-4560 A	ISD: Application for Section 47.1 (Gifted and/or Talented)	Nancy Mincemoyer	373-3279	09	Y	N
SP-4560 B	ISD: Section 47.1 (Gifted and Talented) Final Report	Nancy Mincemoyer	373-3279	09	Y	N
SP-4560 C	Application for Section 47.2 (Gifted and Talented): ISD Summer Institutes	Nancy Mincemoyer	373-3279	08	Y	N
SP-4621 A	Fourth Friday Count of Students Eligible for Bilingual Instruction Funds	Miguel Ruiz	373-6066	08	Y	Y
SP-4621 B	LEA & ISD: Application for Bilingual Instruction Funds	Miguel Ruiz	373-6066	08	Y	Y
PD-4663	Application for Section 97 Funds for Staff Development	Sara Lincoln	373-3608	08	Y	Y
SP-4670	Count of Refugee Students in Grades K-12 in Public and Nonpublic Schools and Program Description	Paul Recchia	373-4584	V	Y	Y

FORM NUMBER	TITLE OF FORM	CONTACT PERSON	TELEPHONE NUMBER	MONTH OF DIST.	ISD	LEA
SCHOOL PROGRAM SERVICES (Cont'd.)						
PD 4674	End-of-Year Professional Development Evaluation Report	Sara Lincoln	373-3608	08	Y	Y
SP 4725	Count of Immigrant Children in Grades K-12 in Public and Nonpublic Schools and Program Description	Paul Recchia	373-4504	V	N	Y
SP 4726	Sec. 47.3 Local District Program for Gifted and Talented	Nancy Mincemoyer	373-3279	08	Y	Y
SP 4732 A	Application for Article 3	Linda Brown	373-3921	08	N	Y
SP 4732 B	Article 3 Evaluation Report	Linda Brown	373-3921	05	N	Y
SP 4732 C	Article 3 Final Expenditure Report	Linda Brown	373-3921	05	N	Y
SP 4739	Application for Implementing the Michigan Model for Comprehensive School Health Education	Wanda Jubb	373-2589	08	Y	Y
SP 4740	Education for Economic Security Act (EESA) Title II -- Improving Mathematics and Science	Nancy Mincemoyer	373-3279	08	Y	Y
PD 4786	Application for Section 98, State School Aid Act; Professional Staff Development Competitive Grant Program	Deborah Clemmons	373-3608	08	Y	Y
SP 4803	Initial Application for the Michigan Early Childhood Program (Grant or School Aid)	Carolyn Logan	373-8483	08	Y	Y
SP 4803 A	Renewal/Continuation Application for the Michigan Early Childhood Program (Grant or School Aid)	Carolyn Logan	373-8483	09	Y	Y
SP 4804	Federal Infant and Toddler Early Intervention Services Allocation Application Format	Carolyn Logan	373-8483	07	Y	N
SP 4804 A	Infant and Toddler Early Intervention Services Program Incentive Grant	Carolyn Logan	373-8483	07	Y	N
SP 4806	Application for Dependent Care Development Grant	Carolyn Logan	373-8483	07	Y	Y
SP 4839	Federal Drug-Free Schools and Communities Act of 1986 Application	Wanda Jubb	373-2589	08	Y	Y
SP 4849	Math and Science Challenge Grant Application	Nancy Mincemoyer	373-3279	08	Y	Y

FORM NUMBER	TITLE OF FORM	CONTACT PERSON	TELEPHONE NUMBER	MONTH OF DIST.	ISD	LEA
SCHOOL PROGRAM SERVICES (Cont'd.)						
SP-4863-A	Federal Drug-Free Schools and Communities Act of 1986 Progress Report	Wanda Jubb	373-2589	06	Y	Y
SP-4863 B	Michigan Model for Comprehensive School Health Education Coordinator's Year-End Report	Wanda Jubb	373-2589	06	Y	Y
OFFICE OF TECHNICAL ASSISTANCE AND EVALUATION						
TA-4317 A	ECIA Chapter 1 Regular School Year Evaluation Report	Irene Leland	373-1830	05	Y	Y
TA 4317 B	ECIA Chapter 1 Neglected or Delinquent Institution Evaluation Report	Irene Leland	373-1830	09	Y	Y
TA-4375	Millage and Bond Election -- Passed or Defeated	Dorothy Van Looy	373-1830	M	Y	N
TA-4645	Section 41, Bilingual Education and Chapter 1, ECIA Migrant Education Evaluation Form	Dorothy Van Looy	373-1830	10	Y	Y
TA-4688	Technical Assistance for Millage Campaigns	Dorothy Van Looy	373-1830	V	N	Y
TA-4689	Planned Millage Election Report	Dorothy Van Looy	373-1830	04	N	Y
TEACHER/ADMINISTRATOR PREPARATION & CERTIFICATION						
TE 4142	Register of Professional Personnel	Ghada Khoury	373-3310	08	Y	Y
TE 4636	LEA -- ISD: Michigan Public School Teacher Lay-Off Report	Ghada Khoury	373-3310	04	Y	N
TE 4745 A-E	State Board CEU Sponsor and Program Approval Forms	Saundra Carter	1-800-736-0008	12	Y	Y
TE-4748	Application for Public School Administrator Certificate	Saundra Carter	1-800-736-0008	08	Y	Y

FORM NUMBER	TITLE OF FORM	CONTACT PERSON	TELEPHONE NUMBER	MONTH OF DIST.	ISD	LEA
VOCATIONAL-TECHNICAL EDUCATION SERVICES						
VE-4001 A	Annual Plan for Secondary Vocational Education	William Rude	373-0600	10	Y	Y
VE-4001 B D	Applications for New Programs and/or Program Improvement Equipment Funds	William Rude	373-0600	10	Y	Y
VE-4003	Application for Full-Time Vocational Administrator	William Rude	373-0600	06	Y	Y
VE-4009	Application for Secondary Area Vocational Education Center Designation	Robert Pangman	373-3365	R	Y	Y
VE-4033	LEA/Area Vocational-Technical Education Fund Expenditures	Charles Kiefer	335-0360	06	N	Y
VE-4050	Application for Area Vocational-Technical Construction Grant	Richard Karelse	335-0378	R	Y	Y
VE-4057 A	Certification of Encumbrance of Funds for Secondary Vocational Equipment	Larry Schueller	335-0355	V	Y	Y
VE-4058 A	Reimbursement Request for Approved Vocational Equipment	Larry Schueller	335-0355	V	Y	Y
VE-4118	Application for Reimbursement of Vocational Education Administration Salaries & Travel	Larry Schueller	335-0355	05	Y	Y
VE-4166 C	Final Report for Secondary Vocational Education Projects for Persons with Special Needs	Terri Giannola	335-0375	05	Y	Y
VE-4166 COF	Final Report for Secondary Vocational Education Projects for Criminal Offenders	Pat Dunn	335-0358	05	Y	Y
VE-4166 D	Final Report for Postsecondary Vocational Education Projects for Persons with Special Needs	Terri Giannola	335-0375	05	Y	Y
VE-4284	Vocational Education Equipment Inventory	Larry Schueller	335-0355	02	Y	Y
VE-4301	Secondary Vocational Enrollment and Termination Report	James Bebermeyer	373-6731	05	Y	Y
VE-4483 ABD	Vocational-Technical Fall and Spring Data Collection Packet	Mack Seney	335-0360	V	Y	Y
VE-4527	Certification of Eye Protective Devices & Informed Instructors	Ricardo Medina	373-6336	08	Y	Y
VE-4648	Consolidated Vocational Education Project Application	William Rude	373-0600	03	Y	Y

FORM NUMBER	TITLE OF FORM	CONTACT PERSON	TELEPHONE NUMBER	MONTH OF DIST.	ISD	LEA
VOCATIONAL-TECHNICAL EDUCATION SERVICES (Cont'd.)						
VE-4648 A	Final Report: Vocational Education Programs for Single Parents and Homemakers	Sherry Anderson	373-3388	05	Y	Y
VE-4648 B	Final Report: CBO/LEA Cooperative Efforts for Vocational Education Services	Sherry Anderson	373-3388	05	Y	Y
VE-4648 C	Final Report for Sex Equity Activities	Sherry Anderson	373-3388	05	Y	Y
VE-4660	MOIS User Site/Materials Summary, and Contact Person Update	Gail Dunham	335-0383	02	Y	Y
VE-4679	Quik Start: Vocational-Technical Education Economic Development Job Training Program	Dixie Grow	373-6730	V	Y	Y
OTHER						
STUDENT FINANCIAL ASSISTANCE SERVICES OFFICE OF TENURE, NEGOTIATIONS AND HEARINGS OFFICE OF RESEARCH AND INFORMATION SERVICES						
FA-4610	Verification of Student's High School Graduation Recommendation Action	Walter Appel	373-3394	04	N	Y
OS-4132	Property Transfer Appeal Information	Ladislaus Dombrowski	373-3900	R	Y	N
OS-4143	Intermediate School District Report and Map of Boundary Changes	Ladislaus Dombrowski	373-3900	R	Y	N
RI-4544	LEA & ISD: Update of School District and Schools	Ki-Suck Chung	373-4084	05	Y	Y
RI-4701	Progress Report on Blueprint for Action and High School Graduates Report	Jacob Silver	373-4084	11	N	Y

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