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MEMBER

California Legislature

70th ASSEMBLY DISTRICT

COMMITTEES
Rules
Education
Transportation

EDUCATION

From

The Acquisition of Knowledge

to

Programmed, Conditioned Responses

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A Report Prepared by
the Office of
Assemblyman Robert H. Burke

INTRODUCTION

Several months ago, my office began accumulating material which had particular significance in the area of Planning, Programming, Budgeting Systems because of its potential use as a tool of fiscal accountability in the field of education. As we searched into the information available on the application of this subject in education, it became increasingly difficult to see any relationship between the proposed programs and fiscal accountability. It was apparent after a study of the methods proposed for use by the schools for accountability purposes that fiscal accountability was being minimized and the techniques were being promoted for achieving behavioral objectives. Other seemingly unrelated organizations, projects, and programs were uncovered because of their influence on the application of accountability methods. They were as parts in a puzzle - analysed by themselves, each of these projects appeared to be either harmless or expressions of someone's "dream." When linked together with other "harmless" programs, they were no longer formless, but could be seen as an entire package of plans outlining methods of implementation, organizational structures (including flow-charts), computer utilization, use of behavioral profile catalogs, and goals and objectives determination.

In my February, 1971, Newsletter, I touched on the subject in an article entitled, "Planned-Programmed-Budgeting-Systems." The response to this was such that I determined to present additional findings and information as well as some thoughts and

ideas which have been developed during these last few months. In attempting to do so, I found that the subject couldn't be properly covered in a single article in one of my Sacramento Reports. This report, EDUCATION - FROM THE ACQUISITION OF KNOWLEDGE TO PROGRAMMED, CONDITIONED RESPONSES, is an attempt to provide the reader with more information. A second Newsletter article summarizing this report was included in the April Sacramento Report. It was intended to stimulate interest in this vast and far-reaching subject of potential societal control. Included in this article I offered to provide the reader with this more detailed information. The report which follows is still very general in nature, although an attempt was made to pinpoint some of the more important details. The information available in government reports is voluminous. What is being attempted, therefore, is a "white paper" report, using a minimum amount of description, while reproducing significant passages from some of the previously published literature, the two previous Newsletter articles (February and April, 1971), and a bibliography of material used.

ROBERT H. BURKE
May 1, 1971

EDUCATION - FROM THE ACQUISITION OF KNOWLEDGE
TO PROGRAMMED, CONDITIONED RESPONSES

There is in education today a strong attraction toward "change or innovation," not only in the classroom, but in the total concept of purpose. "Goals and objectives" are being discussed, challenged, defined and changed. The purpose of education is heading in an entirely new direction. One need not look far to find evidence and examples of this "new look" in education.

School districts all over the state have completed what they term "graduation requirements" for high school seniors. Typical of such requirements is the statement of goals and objectives shown below setting forth eighteen goals for students which must be achieved" --- in order to meet the minimum graduation requirements of the . . ."⁽¹⁾ The goals as they appear in one such document are listed below:

Goal 1.0 --- "A student shall understand and be aware of himself as a unique and valuable human being."

Goal 2.0 --- "A student shall understand the conditions necessary for the maintenance of physical health."

Goal 3.0 --- "A student shall prepare himself for a self-supporting productive life."

Goal 4.0 --- "A student shall recognize the component skills of thinking necessary to engage in creative experience."

Goal 5.0 --- "Each student shall develop the skills and attitudes necessary for developing self expression in a selected field."

Goal 6.0 --- "Each student shall understand the role of the family unit in order for him to function effectively as a member of his family."

Goal 7.0 --- "Each student shall understand the basic consumer economics for a family unit to function effectively."

Goal 8.0 --- "Each student shall understand the maintenance and operation of a home."

Goal 9.0 --- "Each student shall have acquired a knowledge of the English language system, and basic skills in reading, composition, listening, and speaking."

Goal 10.0 --- "Each graduation candidate shall have acquired a knowledge of the mathematical system and a mastery of the basic computational skills."

Goal 11.0 --- "Each student shall acquire the knowledges, understandings, skills, attitudes, and appreciations which will allow him to function responsibly as a member of society."

Goal 12.0 --- "Each student shall understand and appreciate the historical background of human culture."

Goal 13.0 --- "Each student shall understand and appreciate selected basic principles from the fine arts."

Goal 14.0 --- "Each student shall exhibit an understanding of selected basic principles in the social sciences."

Goal 15.0 --- "Each student shall exhibit an understanding and appreciation of some basic selected aspects of literature."

Goal 16.0 --- "Each student shall exhibit an understanding and appreciation of audio-visual experiences."

Goal 17.0 --- "Each student shall understand and appreciate natural phenomena and the conservation of the environment through a knowledge of science."

Goal 18.0 --- "Each student shall complete 200 units of credit and will have completed a five-unit course in the following subjects between grades 7 and 12: English, American History, American Government, Mathematics, Science, and Physical Education (400 Min ea 10 days) as required by state law."

To summarize - a student needs little more than an eighth grade academic education to graduate from the twelfth grade of such a district, but is expected to have the social maturity of a well seasoned adult.

Where did education begin to turn from an academic learning situation to the current trend of "educating the whole child?" For the beginning we must look to the California State Plan⁽²⁾ and to the Elementary and Secondary Education Act of 1965⁽³⁾ (ESEA) from which the power to direct change is derived.

ESEA
*

The California State Plan was written by the State Advisory Council, and submitted to the State Board of Education who upon their approval⁽⁴⁾ submitted it to the U. S. Office of Education

in 1969. The purpose was to establish an "acceptable" (to the USOE) format for the state and the individual school districts to follow when applying for Federal funds for new programs. In the assurance of the State Plan, Page 2, (2) d) ~~"Not less than 50 percent of new program funds under Title III of the Act will be used for: 1) Planning innovative, exemplary, experimental, and enriching programs or activities, including the development of pilot projects to test the effectiveness of such plans; and 2) Establishing or expanding innovative and exemplary educational programs for the purpose of stimulating the adaptation of new educational programs in the schools of the State."~~

With the approval by the U. S. Office of Education of the California State Plan, the California Legislature passed the necessary laws ⁽⁵⁾ to provide the program with proper state funding to operate the agencies in charge of the programs and to train the district personnel in the new methods of "proving need" for their districts as per the State Plan. "Educational Needs Committees" ⁽⁶⁾ from all of the counties in the state submitted reports based on studies of their respective counties. The State Council charged with the writing of the State Plan studied the needs submitted and in section 2/3/1 (Page 2) of the Plan ⁽²⁾ states: "The decision was made to use a classification system or taxonomy and to classify the statements of need generated by the regional studies according to the taxonomy, thereby structuring the results of the regional studies into a composite

system" . . . "The Ten Goals provided a classification system simple enough (in terms of the number of categories) to work with and yet comprehensive enough in scope to include almost any educational objective, whether cognitive, affective or psychomotor." For description of taxonomy classifications, cognitive, affective, or psychomotor, see "Taxonomy of Educational Objectives."⁽⁷⁾

"The Ten Goals of Quality Education" set forth in the State Plan⁽²⁾ and the criteria used for judgment of whether a program submitted by the district for a Federally funded program would be accepted follows: 1) Self Understanding, 2) Tolerance of others, 3) Basic Skills, 4) Attitude Toward School, 5) Attitudes associated with responsible citizenship, 6) Health, 7) Creativity, 8) Vocational Preparation, 9) Intellectual Achievement, 10) Life-Long Learning. (An interesting comparison can be made between these Ten Goals and the graduation requirements previously mentioned.

A procedure has, therefore, been established to require a school district that wants to apply for Federal funds through Title III to 1) prove the need in the community for the program and 2) write the program to fulfill the Ten Goals set forth on a Classification/Taxonomy System.

A key to the ultimate use of the programs developed is the repeated emphasis on taxonomy. What is Taxonomy? The dictionary defines taxonomy as "the study of the general principles of

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scientific classification: SYSTEMATICS 2: CLASSIFICATION:
 specif: orderly classification of plants and animals accord-
 ing to their presumed natural relationships." Taxonomy of
Educational Objectives (7) - "The Classification of Educational
 Goals," Editor Benjamin S. Bloom, on Page 12 of "Handbook I:
 Cognitive Domain" states, "What we are classifying is the in-
 tended behavior of students - the ways in which individuals
 are to act, think, or feel as the result of participating in
 some unit of instruction." On Page 6 of the same book he
 states, "The taxonomy should be consistent with relevant and
 accepted psychological principles and theories." In "Handbook
 II: Affective Domain," Editor Bloom states, page 184, "Our
 concern is to indicate two things: a) the generalization of
 this control to so much of the individual's behavior that he is
 described and characterized as a person by these pervasive con-
 trolling tendencies and b) the integration of these beliefs,
 ideas, and attitudes into a total philosophy or world view."
 (Emphasis added)

Chapter 6 of the Elementary and Secondary Education Act (3)
and various sections of the California Education Code (5) pro-
vide for the agencies and their funding to implement the Federal
programs in our California school system. Article 2 of the Edu-
cation Code provides for the Educational Innovation Advisory
Commission (originally titled the Council, author of the State
Plan), and Section 583 provides the Advisory Commission with
the power and authority to initiate and/or review innovative

proposals and recommend to the State Board of Education for its approval all Title III projects which will operate in the state.

(8)

The Bureau of Program Planning and Development is charged with the responsibility for administering Title III, ESEA programs within the state. They report to the Advisory Commission and to the State Board of Education. The Bureau's two contributions which have been of major influence in determining the direction of California education are: 1) Operation PEP (Prepare Educational Planners), a program for the training of administrators in systematic planning procedures, systems analysis techniques, program evaluation review techniques, cost-benefit analysis and planning programming budgeting systems (PPBS), and their application as a means of directing behavioral change, and 2) the funding of twenty-one regional planning centers. These centers, known as Supplementary Education Centers called PACE (Projects to Advance Creativity in Education) are charged with the responsibility of 1) training educators on the county level through "In-service Training" on the methods of Operation PEP, and 2) assisting school districts in the writing of applications for Title III funds. On Page 31 of the Report of the Study Title III, ESEA⁽¹¹⁾ it is stated that: . . . "The Bureau employs, and should employ, the State Plan⁽²⁾ as a guide for implementing the intent of the Federal Congress through Title III, ESEA." There is a demonstrated difference in intent between the Federal Congress and those charged with administering Title III.

(11)

The bureaus and agencies which were previously mentioned as part of the overall organization, play an integral role in the transmitting of directives from ESEA in Washington, D.C., to the classroom teacher. Built into this organizational system are guidelines which have to be followed, methods for reporting progress and accomplishments, and methods for screening to retain only the suitable projects. It appears that only those tools which are considered to be useful to the "elite" remain.

The machinery for the management of society is here - it is a reality. The system provides for methods by which behavior of students is measured, as well as the subtle process by which behavior patterns are "improved" until they meet the requirements as set forth in the planning and programming. In the hands of those who would use this instrument of thought control and societal management to further their own aims, this entire concept of "educational management" takes on a dangerous dimension which had evidently not occurred to many whose intentions were well motivated. The entire system has become a "people control mechanism" and has caused many in the educational field to lose sight of the real goal and purpose of education. There can be little doubt as to the intent of the "educational planners" who clearly express their aim in a PEP publication entitled, "Toward the Management of Society" (12) --- "At first glance, the approach herein presented may seem breathtakingly -- if not outrageously or even dangerously -- ambitious. This is because of

the inherent potentiality of any accounting system to be used as an instrument of prediction and control. . . . My doubts are not about the possibility of a managed society. I am reasonably well convinced that social technology can be developed so that it would be possible to gain considerable control over many societal processes." (Emphasis added)

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Digital Computer Principles;
Input-Output TRENDS;
Organizational Aspects of RESOURCE MOBILIZATION;
Considerations in Developing a Hierarchy of Educational Objectives


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ASSEMBLYMAN **70th DISTRICT**

BOB BURKE

REPORTS FROM *Sacramento*

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PLANNED-PROGRAMMED-BUDGETING-SYSTEMS:

FEBRUARY 1971

In 1967, the Legislature authorized a pilot study of a planned, programmed, budgeting system (PPBS), which was developed under the guidance of the Advisory Commission on School District Budgeting and Accounting. The intent of the Legislature in initiating this system was to provide an accounting tool for the local school districts that would help them to more efficiently utilize the tax dollars available for education.

Starting in 1968, a group of fourteen school districts along with one county department of education began the pilot study to utilize the system while gathering information as part of their everyday operation.

The PPBS concept is predicated upon the assumption that if you know where you are and where you want to go, it is possible to determine what the most efficient way is to go from one point to the other. Therefore, PPBS requires that two sets of known facts be established. In education, where you are is established by testing, and where you are going is established by setting goals and objectives. In preparation for implementing PPBS on a statewide basis, the Legislature has been considering various proposals for statewide testing and for setting statewide goals. Although the discussions have not included limitations on the use of the system, there has been no doubt that the intent of the Legislature in approving the studies was to utilize this "budget system" to achieve maximum "educational" benefits.

It is very unfortunate the Legislature did not impose limitations on the use of PPBS in the schools. Because there are no restrictions on the application of PPBS in education, the social managers who would mold us all into their version of the "utopian man" and who call themselves "educational"

MORE ON PPBS AND BEYOND

In the February issue we wrote about the abuses in education of an accounting tool known as PPBS. This is but one of many pieces which, when placed in the proper order, reveal shocking possibilities.

~~All of the elements necessary for the implementation of a plan for the management of society through the public schools of the United States are now functioning.~~ The vehicle for directing our national conscience is Title III of the Elementary and Secondary Education Act of 1965 (ESEA). Utilizing the authority and procedures established by this Act, directives have gone to every corner of the country establishing State Bureaus and local centers known as PAGE (Projects to Advance Creativity in Education) for guiding school administration and curriculum toward stated objectives of a controlled society. Under the guise of innovation and change, the centers encourage local schools to abandon traditional educational goals and methods and to utilize the techniques prescribed by educational planners who have received their training from another ESEA source, Operation PEP (Prepare Educational Planners). Utilizing the tools of PPBS and Taxonomy, the planners are able to determine attitudes of individual students on specific issues, as well as their broad outlook toward life. These same tools are then used to prescribe the changes necessary to direct and mold the child's attitude into one determined by the managers to be more beneficial for society. Common change agents, such as sensitivity training, can be employed to break down old "irrelevant" attitudes and develop new "meaningful" outlooks.

Early education, i.e. Headstart, another ESEA program provides an opportunity to establish the "proper" attitudes before others are developed, thus eventually eliminating the need for change in the upper grades. If allowed to continue, control of society can be achieved by the "new elite" in less than a generation.

This insidious plan already has widespread support in many quarters. Left unchecked, the consequences will be an unimagined amount of power and control over society in the hands of a few. I'm sure many of the proponents are well meaning, but they must also be misguided. Most have become so impressed with their own distorted version of their abilities that they have come to believe they alone are capable of guiding and planning young lives.

I wouldn't want that kind of control exerted over me- and I don't want to see others controlled in that way either. I don't believe anyone should have that much power over others lives and attitudes. It's hard to imagine that it's happening right now - it's hard to believe that anyone is controlling attitudes. It makes no difference whether the control is planned or coincidence- the result is the same. We might ask how this is all possible - how has it been able to go this far? I believe it's a result of the lack of interest in the schools shown by most parents, and our tendency to let the schools assume what should be parent/church responsibilities. We cannot ever assume that the schools are automatically going to do the best thing for our children. We must be watchful and alert for our children's sake. Encourage and inform others to do the same, and finally - let the schools, the State Board of Education, and particularly, the Superintendent of Public Instruction, Wilson Riles, know of your position.

All of the statements in this article can be substantiated by documentation. I have a detailed report prepared which is available upon request. An extensive file covering this subject may be reviewed in my district office.

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California State Plan

Title III of the Elementary and Secondary Education Act

P. L. 89-10, as Amended by P. L. 90-247

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REPORT OF THE STUDY TITLE III, ESEA

by
EMERY STOOPS and Staff

for
THE EDUCATIONAL INNOVATION ADVISORY COMMISSION
AND
THE BUREAU OF PROGRAM PLANNING
AND DEVELOPMENT

CALIFORNIA STATE DEPARTMENT OF EDUCATION
Sacramento, California, 1970

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**PART II - THE BUREAU OF PROGRAM PLANNING
AND DEVELOPMENT**

DEFINITION AND ORIGIN

What is the Bureau? The *Bureau* is the unit comprised of three sub-units (Program, Evaluation, Fiscal) within the State Department of Education, charged with the responsibility for administering Title III, ESEA, programs within the state.

Origin of the Bureau. An Instructional Program Planning and Development Unit was established by State Board action in 1965 and was funded through a Title V, ESEA, project. This unit was comprised of three persons responsible for the state level administration of Title III, ESEA, and coordination of Title V, ESEA. A general conceptual model for effective planned change in education, as well as a management model for the administration of Title III, ESEA, was submitted to the State Board's Federal Aid Committee in 1965, with November 10, 1965 as the first deadline for receiving applications for funds.

K

Two significant developments early in the state administration of Title III, ESEA, were: (1) the project to Prepare Educational Planners (Operation PEP), and (2) the funding of twenty-one regional planning centers. "PEP" sessions trained administrators in systematic planning procedures, systems analysis techniques, program evaluation review techniques, "planning, programing, budgeting system" and cost-benefit analysis.

The purpose of supplementary centers called PACE (Projects to Advance Creativity in Education) was to encourage school districts to develop imaginative solutions to educational problems, to utilize more effectively research findings, to translate the latest knowledge about teaching and learning into widespread educational practice, and to create an awareness of new programs. Through the regional centers, the *Bureau* has endeavored to (1) encourage the development of creative innovations, (2) demonstrate worthwhile innovations in educational practice through exemplary programs, and (3) supplement existing programs and facilities.

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Priority in funding was given to local projects which offered the greatest promise of advancing education and of solving persistent problems.

Amendments to Title III, ESEA, in 1968 provided for the transfer of powers to the State Board, with a 75 per cent state and 25 per cent federal split during fiscal year 1969, and with total state responsibility beginning with fiscal year 1970. The authorization for this transfer is subject to the U.S. Commissioner's approval of a California State Plan for the administration of Title III, ESEA, funds.

California's allotment of funds rose from \$6,145,500 in 1965-66 to \$13,193,285 in 1968-69. The support for supplementary PACE centers remained relatively constant while the funding of innovative and exemplary projects, including handicapped, increased from \$2,557,000 in 1965-66 to \$6,695,700 in 1968-69.

Functions of the Bureau. The *Bureau* activities have included the following:

1. Consultation services to local educational agencies and Title III Centers
2. Coordination of the activities of the twenty-one Title III Supplementary Centers
3. Reporting to the Department on the problems and opportunities facing California education
4. Cooperation with the *Commission* in the preparation of guidelines toward alternative solutions of high priority educational problems
5. Administration of the project proposal review process
6. Conduct of project funding negotiations
7. Assurance of compliance with federal laws and regulations, as well as state laws and regulations relating to the government of schools in proposals submitted under Title III, ESEA

2.2.4
5/1/69

2.2.4 State Leadership Activities for Professional Title III

Staff Development. Responding to the leadership and encouragement of the State Educational Agency, the Supplementary Educational Centers (described in 2.3.8) have provided leadership in development of local educational agency staff activities under this Title by: (1) training local educational agency personnel within their areas in planning, developing, operating, and evaluating projects; (2) in the preparation and submission of formal proposals and applications for grant awards under this Title of the Act, regardless of source of funds; and (3) providing guidance for local educational agency in application of resources and techniques to the functions of adaptation and adoption of tested alternatives.

The Bureau of Program Planning and Development has stimulated the staff professional growth and development activities of local educational agencies with services augmenting those provided by the Supplementary Educational Centers, in performing the primary functions described on the organizational chart (Chart 2.2.1 (c)). In addition, a local educational agency in California has been conducting "Operation P.E.P.," a project funded under this Title of the Act. The short-title of such project means "Preparing Education Planners" in local educational agencies in this State in the application of system analysis techniques to educational processes. This major activity in professional staff development has functioned to instruct educational leaders from all levels

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2.2.4 (page 2)
5/1/69

of California public education in the techniques and methodology of scientific planning procedures in the improvement of education in this State.

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picture of educational need, it was necessary to develop a method for achieving a synthesis of the regional results. The decision was made to use a classification system or taxonomy and to classify the statements of need generated by the regional studies according to the taxonomy, thereby structuring the results of the regional studies into a composite system. For this purpose, the "Ten Goals of Quality Education" were used.* The Ten Goals provided a classification system simple enough (in terms of the number of categories) to work with and yet comprehensive enough in scope to include almost any educational objective, whether cognitive, affective, or psychomotor. These Ten Goals are listed below:

1. Quality education should help every child acquire the greatest possible understanding of himself and appreciation of his worthiness as a member of society (Self Understanding). **
2. Quality education should help every child acquire understanding and appreciation of persons belonging to social, cultural, and ethnic groups different from his own (Tolerance of Others).
3. Quality education should help every child acquire to the fullest extent possible for him mastery of the basic skills in the use of words and numbers (Basic Skills).
4. Quality education should help every child acquire a positive attitude toward school and toward the learning process (Attitude toward School).
5. Quality education should help every child acquire the habits and attitudes associated with responsible citizenship (Citizenship).

* These Ten Goals were generated in the Study of Quality Education initiated by the Pennsylvania State Board of Education in response to a mandate from the Pennsylvania General Assembly.

** Hereafter, each Goal will be designated by the parenthetical phrase following each

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6. Quality education should help every child acquire good health habits and an understanding of the conditions necessary for the maintenance of physical and emotional well being (Health).
7. Quality education should give every child opportunity and encouragement to be creative in one or more fields of endeavor (Creativity).
8. Quality education should help every child understand the opportunities open to him for preparing himself for a productive life and should enable him to take full advantage of these opportunities (Vocational Preparation).
9. Quality education should help every child to understand and appreciate as much as he can of human achievement in the natural sciences, the social sciences, the humanities, and the arts (Intellectual Achievement).
10. Quality education should help every child prepare for a world of rapid change and unforeseeable demands in which continuing education throughout his adult life should be a normal expectation (Life-Long Learning).

A summary of the classification of regional results according to the Ten Goals is presented in Table 2, Appendix A. Examination of the classification led to the following conclusions:

- (a) There was a high degree of consistency between the needs statements from the Title III studies and the Ten Goals of Quality Education, with 80 percent of the statements lending themselves to classification.
- (b) The needs statements were more likely to relate to some goals than to others.
- (c) Needs statements that could not be classified under at least one

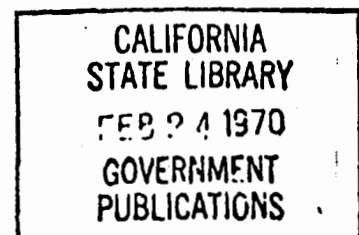
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(Lb)

The California PACE

Narrative Reports of Projects to Advance Creativity in Education

Conducted by Local Educational Agencies
in California, Under Title III of the
Elementary and Secondary Education
Act for the Period July 1, 1968
through June 30, 1969



CALIFORNIA STATE DEPARTMENT OF EDUCATION
Max Rafferty—Superintendent of Public Instruction
Sacramento 1970

Social Indicators, Social Reports and Social Accounts

TOWARD THE MANAGEMENT OF SOCIETY

OPERATION PEP

1969

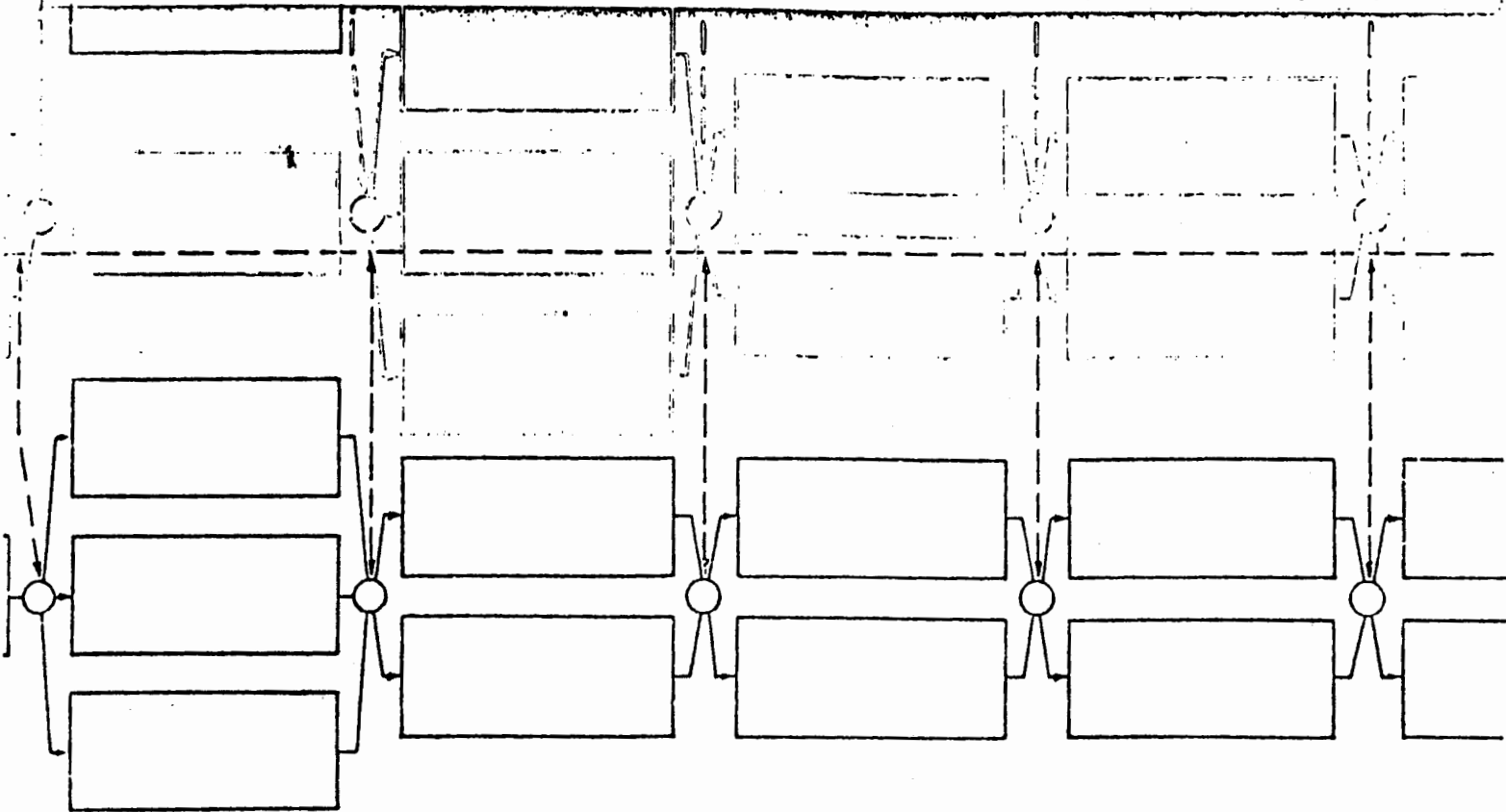
(28)

U.S.O.E. Grant # 299,437

A SYSTEM APPROACH

TO PLANNED CHANGE IN EDUCATION

Volume I. An Adaptive Framework for Public Education and Educational Management



OPERATION PEP

Local educational agency: San Mateo County Superintendent of Schools
 Address: 590 Hamilton Street, Redwood City, California 94063
 Project director: Donald R. Miller

NARRATIVE REPORT OF PROJECT FUNDED UNDER TITLE III ESEA (FY 1969)

Title of project: OPERATION PEP
 A State-wide Project to Prepare Educational Planners for California

Funding:	USOE Grant Award No.	Type	Period of funding		Amount
			From	To	
	OEG-3-7-704410-4439	Operation	7-1-68	6-30-69	\$ 299,457

Target population:

The target population consisted of 96 participants. This population included: (1) district personnel (19 superintendents, 21 assistant superintendents, 27 directors or administrators) who were in direct contact with 667,094 K-12 public school pupils; (2) county office personnel (4 assistant superintendents, 4 staff members) who maintained indirect contact with 1,962,541 K-12 public school pupils; (3) PACE Supplementary Education Center personnel (5 assistant directors, 2 staff members) who provided services which obliquely contacted 2,369,188 K-12 public school pupils; (4) staff members of the California State Department of Education who provided indirect services affecting 5,466,240 K-12 public school pupils; and (5) 10 professors of educational administration from representative state colleges and universities in California.

Major objectives:

The major objectives of OPERATION PEP have been specified with due respect for the educational needs of society and the role requirements of professional educators. They include: (1) to plan, develop, validate and implement an instructional program for educational planners and managers featuring a system approach to educational management; (2) to establish an orderly diffusion process for system approach concepts, principles and procedures involving key educational agencies, organizations, and individuals; (3) to provide assurance that the program developed by OPERATION PEP will be continuously renewed and presented; and (4) to promote the utilization and adoption of a system approach to educational management by educational leaders in California.

Other objectives:

OPERATION PEP was planned to continue for a three-year period, and is designed to: (1) identify and define key educational planning functions; (2) develop models relative to planning and managing the educational planning function; (3) determine what skills and competencies are required by educational planners and managers; (4) design an instructional program for training educational planners and managers; (5) specify relevant educational planning and management resources; and (6) implement a training program for educational planners and managers.

CHAPTER 1

A SYSTEM APPROACH TO PLANNED CHANGE

Introduction

Change is an inevitable condition of being for an individual or an organization situated in an evolving societal and environmental context. Some types of change take place gradually as the individual or the organization adjusts in response to evolutionary changes occurring in its surroundings. Other types of contextual change necessitate relatively rapid responses on the part of an individual or an organization if it desires to survive. Regardless of type, change is a continuous vital process and is subject always to various forms of natural and human regulation. In complex societal enterprises such as public education, human regulation usually takes the form of deliberate planning and management action.

Since the future of our society cannot be left to chance, multi-level, multi-organizational systems of public education were established and are maintained to conserve and transmit past learning to new generations. These systems are expected to develop, install and operate educational programs which are designed and managed to satisfy the specific ecosystemization, acculturation and socialization needs of individual members of society. In an effort to become more efficient and effective in the conservation and transmission of learning in relation to these needs, our society has developed highly systematized states-of-the-arts in information, education

and learning technology.

The population and knowledge explosions and the technological and sociological revolutions have accentuated society's need to develop new forms of educational systems and organizations and more responsive educational programs. To be effective in a rapidly changing societal and environmental context, educational systems and their respective component organizations must realize the need for continuous renewal and develop adaptive mechanisms which facilitate the systematic planning and management of change. Such adaptive mechanisms should take the form of carefully integrated problem-finding and problem-solving groups made up of broadly-representative, intuitive, insightful and interdisciplinary individuals. Each ad hoc group formed should operate as a somewhat autonomous unit in a federated planning and management system. The activities and tenure of a specific group should depend upon its explicitly stated purposes and its defined universe of organizational concern. A group's entire capability and efforts should be directed toward the end of finding and solving critical problems and conflicts which arise between present and required future organizational practices, performance and outputs. Therefore, each group is concerned with appraising probable future environmental contexts, assessing societal needs and determining educational change requirements in relation to the strategic plans of the organization and its present practices, performance and outputs.

One of the most promising organizational renewal techniques which can be used by problem-finding and problem-solving groups is a system approach. This approach is a scientifically-derived methodology for planning and managing change. The methodology features the use of an adaptive framework and a strategy for planned system change. A strategy

for planned system change should provide for the continuous use of system analysis, synthesis and evaluation procedures. The system approach is future oriented and time bound in the sense that it focuses management attention upon future states of expectation or goals, present and future state variables and contexts, human organization factors and alternative programs that can be implemented to facilitate goal attainment and change.

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PRELIMINARY
PLANNING, PROGRAMMING,
BUDGETING SYSTEM
MANUAL
FOR
STATE OF CALIFORNIA SCHOOL DISTRICTS

AN EDUCATIONAL
PLANNING AND EVALUATION SYSTEM

CALIFORNIA STATE DEPARTMENT OF EDUCATION
Max Rafferty - Superintendent of Public Instruction
Sacramento 1970

Considerable effort is necessary before the goal statements for programs on lower levels of the program structure (e.g., reading) become consistent with programs on higher levels of the program structure, including district-wide statements. By nature, district goal statements attempt to deal with the totality of education. Level V statements on the other hand, are expressed in terms of existing activities and knowledge. For example, initial district goals often include such statements as:

"The district will help every child prepare for a world of rapid change."

It is unlikely that the initial level V goal statements in a typical district would clearly support and be consistent with an initial district goal such as this one.

Conceptually, the PPBS approach could achieve consistency by projecting broadly stated level I district goal statements downward into boxes of activities previously undefined. The process of starting from "what is" on each level and working toward consistency is apparently more realistic in that it exposes problem areas sooner and allows people to talk in terms they understand. As the process proceeds, goals on all levels of the program structure will be revised in order to attain relevancy and consistency.

While the process of reviewing goals for relevance and internal consistency is key to the success of a PPBS, the amount of time allocated to review and rewrite activities should be kept within reasonable bounds. Individual tasks and responsibilities should be clearly defined in order to accomplish as much as possible within the time allocated. It may be advisable to appoint a small committee, including a teacher, board member, administrator, student and parent, to review the goal structure for relevance and consistency and identify possible problem areas. The proposed solution to each problem is then recommended to the School Board and other applicable bodies for review and approval. Larger committees, representative of all segments of the total school community, should be involved in any extensive revision of program goals.

(3)

REVIEW OF PROGRAM OBJECTIVES

In an operational PPBS, statements of objectives exist for programs at all levels of the Program Structure. If written and utilized correctly, these objectives are indicators or checkpoints the attainment of which measure advancement toward achieving one or more district goals.

The major uses of objectives may be described as follows:

- Direction for action – objectives provide specific direction for related district activities.
- Criteria for decision-making – when deciding among alternatives, and allocating resources, objectives provide a criteria.

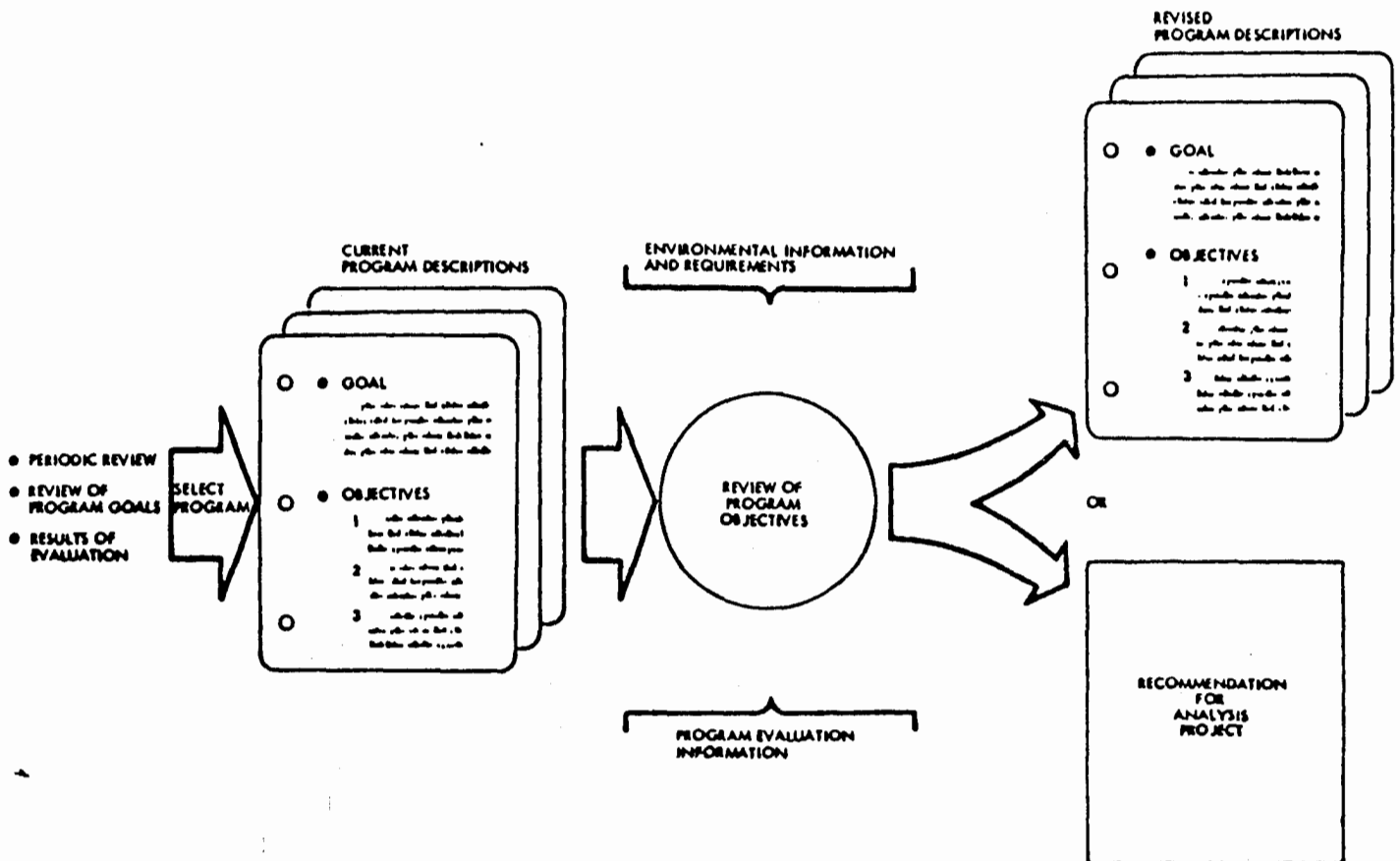


Figure II-9. Review of Program Objectives Process



- Tool for communication -- in discussions among staff members, or with parents and students, concerning purpose or progress, objectives provide a focus.
- Criteria for evaluation -- the success of a program can be measured against its objectives.

A PPBS requires a school district to develop only those objectives which fulfill uses such as these. In particular, a district can only measure the extent of achievement of a limited number of objectives. Classroom teachers may desire to use additional objectives, perhaps a set for every student, and these will support those required by a PPBS. Like goals, objectives are continually subject to review and revision. They are updated as the curriculum and methodology of the district are changed, as goal statements are rewritten to reflect new requirements of the educational system and as the results of evaluation become known. An in-depth review of objectives should answer at least the following questions:

- Do these statements measure advancement toward the related goals?
- Do these statements seem to comprehensively cover the levels of behavior, or other areas, involved?
- Can these statements be clearly understood by all persons who will use them?
- Do these statements contain the necessary factors, and are they consistent and compatible with other district objectives?

As objective writing requires specific knowledge each statement should be written by those persons closely involved with the area in question. Given a good statement of district goals for reading, the best persons to translate those goals into more definitive, quantitative objective statements (differentiated by level of achievement, content area, etc.) are staff members in the program such as teachers and consultants. The program staff should be assisted by representative students in a program, as appropriate to their age and intellect. Program objective statements written by program personnel should still be subject to an outside, objective review, for factors such as those described above.

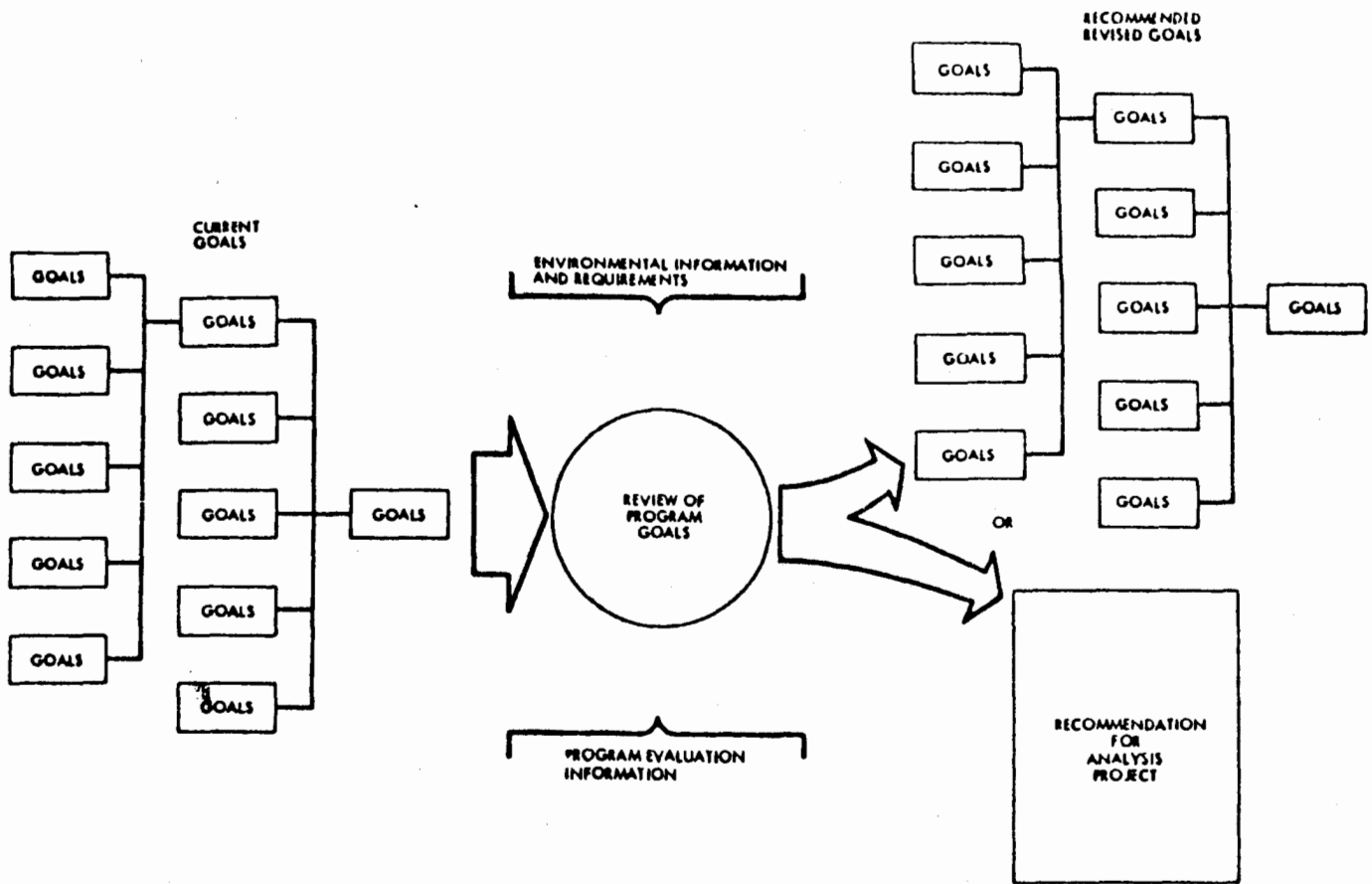


Figure II-8. Review of Program Goals Process

The task of stating educational goals is as complex as that of describing the human nature on which they are based. The large number of segments of the community which should be represented in the review of goals, as well as the organizational problems in managing this effort, add to this complexity.

Those persons responsible for the review and revision of program goals rely on the availability of some form of structure; i.e., the districts' current goal structure and those of other districts; and some amount of information; i.e., current data on the social, economic and education needs of the district; the results of educational programs, and the desires of groups such as teachers, students and taxpayers. The PPBS is structured to assist goal review and revision by collecting and presenting evaluative information and data about programs.

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It may be advisable to appoint a small committee in each district or school, composed of well-trained staff representatives of different curriculum areas, to review statements of major program objectives. The committee should not undertake the task of rewriting the objectives, but should indicate problem areas to program personnel and encourage them to write better statements. Membership on the committee should be for a specified duration, and should help maintain objectivity and provide training for district staff members.

PROGRAM ANALYSIS

Program analysis is that process that identifies programs responsive to stated goals and objectives. Areas for analysis are identified and advanced for analysis primarily through the processes of goal and objective review, as the result of program evaluation, or through the addition or revision of external requirements.

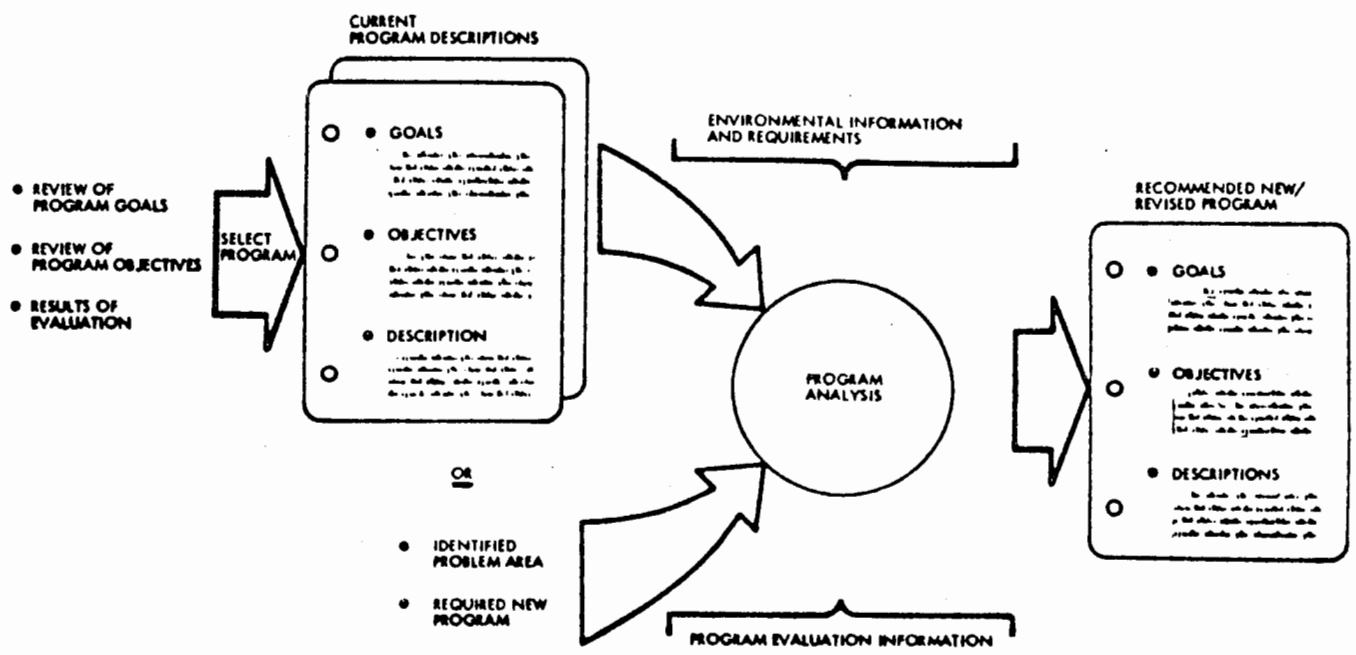


Figure II-10. Program Analysis Process

In an operational PPBS, program analysis will be an ever present process, utilized by teachers, and other decision makers, as they deal with everyday questions. Larger problems, significant enough to involve district-wide attention, may be the subject of a formal system analysis as described in Appendix A.

These analyses employ a common approach to decision making that emphasizes the following, as further described in Appendix A.

- Definition of education problems
- Development of related goals and objectives
- Comparison of alternative programs
- Recommendation of preferred programs

It would be both misleading and inappropriate to imply that each district, school, department, or classroom teacher must have the analytical capabilities to perform complex economic or cost-benefit analysis in order to initiate a PPBS. It is anticipated that only a few formal system analysis projects will ever be undertaken in school districts. Formal analyses require time, money and skills that most districts will not have. However, this approach to decision making will be encouraged and supported by PPBS as the district undertakes the revision of on-going programs or the introduction of new programs, particularly in crucial areas influenced by the changing requirements of society.

In the following passage Charles J. Hitch, President of the University of California, was summarizing the concepts of system analysis, but his remarks also pertain to program analysis as described above. "It is my experience that the hardest problems in an analysis are not those of analytic techniques. . . what distinguishes the useful and productive analysis is the ability to formulate the problem; to choose appropriate objectives; to define the relevant, important environments or situations in which to test the alternatives; to judge the reliability of cost and other data; and not least the ingenuity in inventing new systems or alternatives to evaluate."

PROGRAM DEVELOPMENT

The process of program analysis, described previously, begins with the definition of a problem and ends with recommending a preferred solution.

CHAPTER I

SUMMARY OF CONCLUSIONS AND RECOMMENDATIONS

The Joint Committee on Educational Goals and Evaluation was established by the passage of Assembly Concurrent Resolution No. 195 by the Legislature during the 1969 Regular Session (See Appendix A). The Joint Committee was to determine and recommend the best means for identifying educational goals and objectives appropriate to the needs of modern society and the means for developing a comprehensive statewide plan of assessment and evaluation designed to measure the degree to which the public school system is achieving such goals and objectives.

Conclusions

As a result of its investigation, the Joint Committee concluded:

(1) It is essential that the goal-setting process include the extensive and intimate involvement of the public with students and educators at the level of the local educational agency.

(2) The support of the public for such goals is essential.

(3) The value of setting goals is as much in the process of participation as in the final outcome.

(4) Inasmuch as the learning process is recognized as being dynamic and individualistic, any objectives of education that are established should not become too specific or too restrictive as to stultify the learning process.

(5) The flexibility and the freedom granted to school districts by the enactment of the George Miller, Jr., Education Act of 1968 (SB 1) should not be impaired by the adoption of state-wide goals of education.

(6) To ensure that the goals and objectives of public education continue to be appropriate and relevant, a recycling process should be designed.

(7) Those with authority for educational policy should take a role of leadership in identifying goals of education.

(8) An assessment of needs, relevant to the present and long-range future of public education, should be accomplished during the goal-setting process.

(9) The involvement of the legislature in the establishment of educational goals and objectives for California public schools would provide a necessary linkage between the public and those responsible for educational policy.

(10) An assessment and evaluation program should be comprehensive and explicit in identifying the relationships between human and material resources, the educational process, and learning growth in terms of student achievement and attitudes, cost-benefits, and other goal-related criteria.



Recommendations

The Joint Committee recommends:

(1) A joint committee on educational goals and evaluation be established for the purpose of guiding the developmental process of setting goals and objectives of education.

(2) Goals and objectives be recommended for adoption to the State Board of Education after consideration of goals and objectives identified by local education agencies.

(3) The study identifying the goals and objectives of education should be accomplished in less than two years.

(4) Legislation should be adopted which directs local education agencies to state the philosophy, goals, and objectives of their educational program.

(5) The development of an assessment and evaluation program that would measure progress toward the goals and objectives of education that have been identified should serve several purposes, such as: the collection of data on children who are entering the California public schools for the first time; the measurement of student progress across grade or age levels in areas of instruction; and evaluation of special programs.

(6) Advisory committees should be appointed to assist the joint committee in its work. Members of these committees should be selected from many segments of the public, including students, parents, educators, members of governing boards, and persons with demonstrated expertise in appropriate areas of study.

(7) When the process of setting goals and objectives has been completed and the evaluation design has been accepted and formalized for purposes of implementation and administration, the State Board of Education should be responsible for the continuing leadership role in the data-collection and evaluation process.

THE COMMITTEE INVESTIGATION

The Purpose of the Study

The State Board of Education shares with the Legislature the concern for rebuilding public confidence in the state school system.

State leaders also agree on the need for assessing the role the schools will play in promoting the growth of the individual and society under the changing conditions of today's and tomorrow's world.

These shared interests led to this study, which represents a first step toward the development of a rational framework for the making of educational policy. The identification of publicly endorsed goals of education and the creation of an information feedback system are two requirements the California school system must meet to increase its responsiveness to the people it is intended to serve.

The Charge of the Study

A joint committee was established by the Legislature to determine and recommend the best means for identifying educational goals and objectives appropriate to the needs of modern society and for developing a comprehensive statewide plan of assessment and evaluation designed to measure the degree to which the public school system is achieving such goals and objectives.

The Assembly and Senate Committees on Education, acting as and constituting the Joint Committee on Educational Goals and Evaluation, and in cooperation with a three member committee of the State Board of Education, were to undertake the study and submit a final report to the Legislature during the 1970 Regular Session.

Defining the Scope of the Study

A.C.R. 195 was the first step in the process of developing statewide assessment of the effectiveness of our public educational system. This step was directed toward answering three questions:

- (1) What should our educational system be attempting to achieve?
- (2) What is our educational system attempting to achieve?
- (3) What is our educational system actually achieving?

Two specific outcomes were expected from the feasibility study (A.C.R. 195):

- (1) a plan for formulating goals and specific objectives; and
- (2) a plan for formulating an assessment of educational progress.

The Committee recommendations describe a preferred course of action for defining educational goals and objectives and for developing an assessment system which will provide the basis for rational policy.

The final objective, then, is a re-evaluation and re-definition of the total public school system as it operates within the context of a rapidly changing world and the formulation of a state assessment system which conforms to the requirements of education in modern society.

To achieve this objective, these long-range outcomes must be generated:

- (1) goals and measurable objectives,
- (2) performance measures,
- (3) data collection and dissemination,
- (4) success criteria,
- (5) changing priorities, and
- (6) accountability to the people.

This set of anticipated outcomes comprise an assessment system. By evaluating learning progress with respect to success criteria, current priorities would be identified. Then schools would be held accountable for improving in these identified areas of need. By defining the relationship of schools to society and establishing appropriate goals, a basis for rational policy would be forthcoming.

Table I (p. 7) presents a summary outline of the relationship between the expected outcomes of the feasibility study and the anticipated long-range outcomes.

Table II (p. 8) is a decision flow chart which depicts a plan for educational policy development leading to the final objective, a state assessment system. This table is intended to assist members by providing a common frame of reference when deciding on future courses of action.

Attention should be directed to a number of significant undertakings which are closely related to the study: the Governor's Commission on Educational Reform; the Advisory Commission on School District Budgeting and Accounting; the Advisory Committee on Achievement and Evaluation; the CSBA Goals Classification System; the CSBA Project on the Development of Performance Objectives; Operation PEP; ESEA Title III PACE centers; the Cooperative Task Force on the California Educational Information System; the CESAA Education Decision-Makers Project; the UCLA Center for the Study of Evaluation. District level activities are too numerous to mention. Because of this abundance of related activity, it seems imperative that the Legislature and State Board of Education view this study as the coordinating effort which will begin to tie the many threads of knowl-

edge into an integrated assessment network for the benefit of students in California.

Definitions

For the purposes of this report, the following definitions are presented:

"Goal" means a statement of broad direction, or intent which is general and timeless and is not concerned with a particular achievement within a specified time period.

"Objective" means a desired accomplishment that can be verified within a given time and under specifiable conditions which, if attained, advances the system toward a corresponding goal.

"Assessment" means a statement of the status of the educational system as it presently exists in comparison to desired outputs or stated needs of the system.

"Evaluation" means the collection, processing, and interpretation of data pertaining to an educational program. Evaluation would include both descriptions and judgments as to the quality and appropriateness of goals, environments, personnel, methods and content, and outcomes.

Research Methodology

In order to fulfill its responsibility in the limited time period, the Joint Committee on Educational Goals and Evaluation attempted to acquire the best information available on the problem in an efficient and systematic manner.

The problem under investigation raised these fundamental questions:

- (1) Who is to be involved in identifying educational goals and objectives?

- (2) Who is to be involved in developing a state-wide system of assessment?
- (3) What legislative guidelines, if any, are going to govern these persons and activities?
- (4) When are these activities to be completed?
- (5) What is the expected outcome of these activities?

These questions were asked of a large sample of individuals and groups who had demonstrated personal or professional interest in the problem (see Appendix D). Opinion was collected through both written responses and public testimony.

Another important aspect of the research was a review of the literature of current practice in goal-setting and evaluation, and an auditing of new knowledge and experimental programs. The committee staff did not confine the investigation to California programs. Practices in Utah, New York, Pennsylvania and Michigan were subject to on-site observations.

The advice and counsel of national leaders in the areas of educational goals and evaluation were sought. The dialogue thus established proved to be quite beneficial.

In summary, the feasibility study involved five stages, as follows:

- (1) up-date current practice in California,
- (2) audit new knowledge and experimental programs nationwide,
- (3) survey opinion regarding goal-setting and assessment design,
- (4) analyze findings, and
- (5) formulate recommendations.

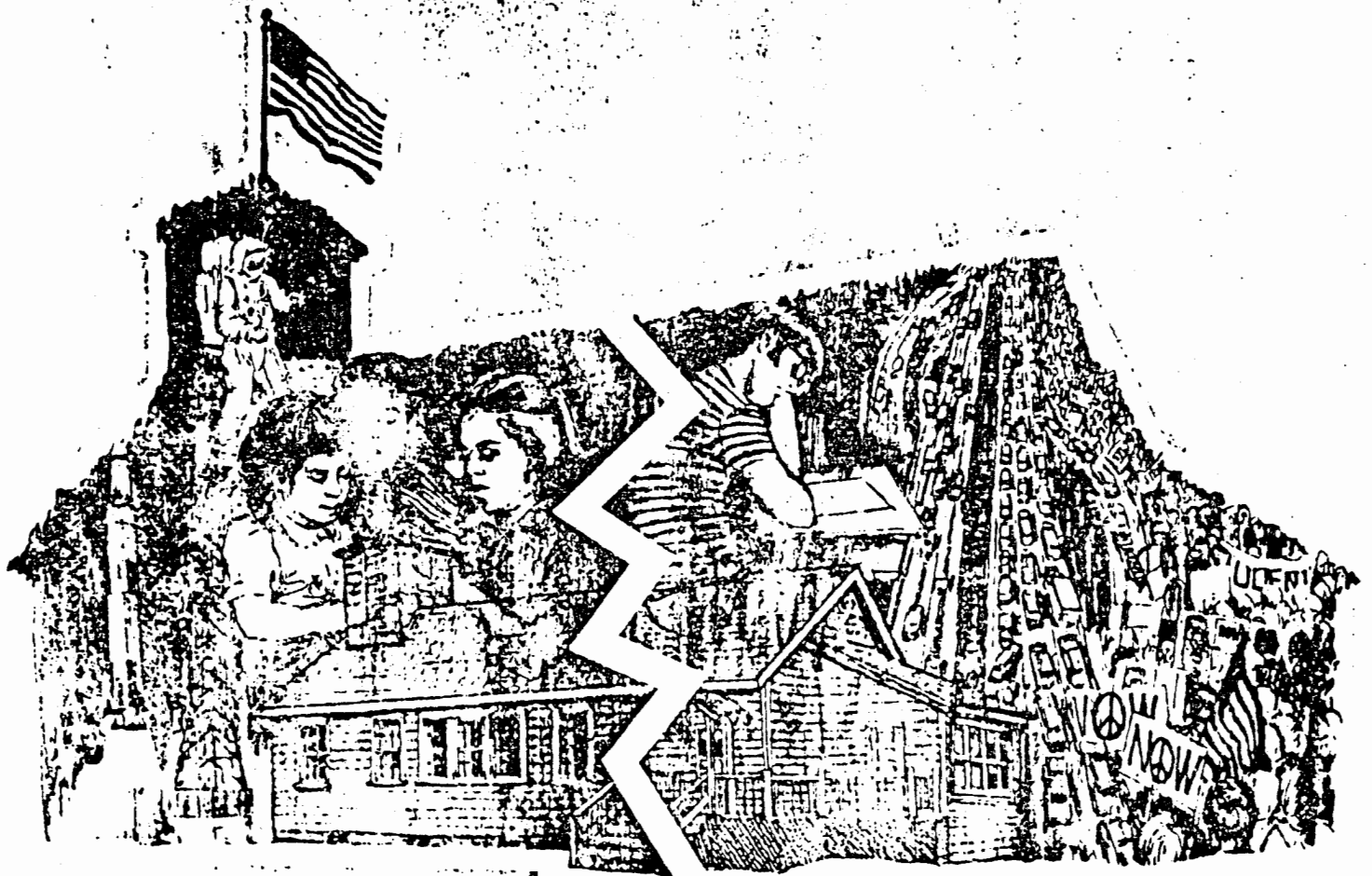
Chapter IV summarizes the research data collected in the first three stages.

The conclusions and recommendations are reported in Chapter V.

TABLE I
Feasibility Study Outcomes in Relation to Long-Range Outcomes

STUDY OUTCOMES		LONG-RANGE OUTCOMES	
A plan for formulating goals and objectives	<p>PROPOSED LEGISLATION</p> <p>ACR 85</p> <p>AB 2430</p>	Goals and measurable objectives	<p>Assessment: Basis for Rational Policy</p>
A plan for formulating evaluation of educational progress		<p>Performance measures</p> <p>Data collection and dissemination</p> <p>Success criteria</p> <p>Changing priorities</p> <p>Accountability to people</p>	

The way to relevance and accountability in education



A Report of the Joint Committee on Educational Goals and Evaluation
May, 1970, California Legislature

CONCLUSIONS AND RECOMMENDATIONS

Conclusions

Based upon several sources of information, including public testimony, staff field reports, a review of related literature, and contributions by members of the Joint Committee, conclusions relating to the development of educational goals, objectives, and an evaluation plan have been identified. The following conclusions appear to be warranted.

It is essential that the goal-setting process include the extensive and intimate involvement of the public with students and educators at the level of the local education agency. Such public should include school board members, students, educators (including certificated and noncertificated instructional staff), parents, representatives of business and labor, scholars, scientists, artists, and other citizens concerned with the direction and welfare of public education.

The support of the public for such goals is essential.

The value of setting goals is as much in the process of participation as in the final outcome.

Inasmuch as the learning process is recognized as being dynamic and individualistic, objectives of education that are established should not become too specific or too restrictive as to stultify the learning process. Objectives should be adopted which are not too narrowly defined and yet are subject to evaluation.

The flexibility and freedom granted to school districts in designing programs and identifying local priorities by the enactment of the George Miller, Jr., Education Act of 1968 (SB 1) should not be impaired when state-wide goals of education are adopted.

Local districts should continue to develop curriculum and innovative programs pursuant to SB 1 and should adopt goals and objectives of education appropriate to the needs of the particular school district.

To ensure that the goals and objectives of public education continue to be appropriate and relevant, a recycling process should be designed. A review of goals and objectives every three to five years, at least, should be accomplished for the purpose of reflecting changes in society and technology in the operation of the schools.

Those with authority for educational policy should take a role of leadership in identifying goals of education. The involvement of local education agencies, the Office of County Superintendents of Schools, the State Department of Education, and the Joint Committee would enhance the goal-setting process.

An assessment of needs, relevant to the present and long-range future of public education, should be accomplished during the goal-setting process. Through

the efforts of Operation PEP and the PACE centers, many school districts have gone through the preliminary process of identifying the needs of education. These efforts, and other efforts in California, should be coordinated in such a way as to relate the needs of education to the goals of education.

The involvement of the legislature in the establishment of educational goals and objectives for California public schools would provide a necessary linkage between the public and those responsible for educational policy. The appropriation of monies for the support of the public schools is invested in the Legislature. If the level of the state contribution to the funding of local educational programs is to increase to 50 percent, the responsibility for attaining certain goals of education must be assured. Continuous legislative enactments and decisions must be substantiated by evidence of successes and needs of school programs.

An assessment and evaluation program should be comprehensive and explicit in identifying the relationship between human and material resources, the educational process, and learning growth in terms of student achievement, and attitudes, cost-benefits and other goal-related criteria. A minimum program of assessment and evaluation should include, at least, the following:

- (a) An evaluation of the common areas of instruction that are identified in the goal-setting and objectives-setting process.
- (b) The collection of appropriate educational data on children that are entering the California public schools for the first time.
- (c) The measurement of student progress across grade or age levels in a particular subject-matter area.
- (d) The collection of data on the education environment within a school, including the condition of the physical plant, instructional equipment and materials, curriculum, and the views of students, teachers, and administrators of the school's educational offerings.
- (e) The collection of data on the environment within a school attendance area, including socioeducational data, size of school, fiscal and material resources, and the students, parents, and other residents' view of the relationship between the school and the community.
- (f) The measurement of special education programs, including programs for the physically handicapped, educationally handicapped, and mentally exceptional children.

U.S. Congressman 1993?

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Recommendations

Based on the above conclusions, the Joint Committee on Educational Goals and Evaluation has introduced two proposals for adoption by the Legislature (See Appendices B and C). These proposals are framed to satisfy the committee recommendations, as follows:

A joint committee on educational goals and evaluation be established for the purpose of guiding the developmental process of setting goals and objectives of education. The Joint Committee should consist of four members of the Assembly, four members of the Senate, and the three members of the State Board of Education serving in an advisory capacity. The Joint Committee should serve as a policy-recommending committee to the Legislature. The inclusion of members of the State Board of Education on the Joint Committee should enhance a liaison between the Legislature and the State Department of Education. (Table III, page 23)

Goals and objectives be recommended for adoption to the State Board of Education after consideration of goals and objectives identified by local education agencies.

The study identifying the goals and objectives of education should be accomplished in less than two years. The Joint Committee should develop guidelines for local education agencies that would provide suggestions and recommendations for participation by the public and recommendations for the in-service training of personnel who will provide local leadership.

The George Miller, Jr. Education Act of 1963 (SB 1) should be amended to direct local education agencies to state the philosophy, goals and objectives of their education program. The present language does not sufficiently specify the need for well-defined statements of purpose (see Appendix C).

The development of an assessment and evaluation program that would measure progress toward the goals and objectives of education that have been identified should serve several purposes. The improvement of instructional programs is paramount and any changes in the schools would be supported by data derived from a comprehensive assessment program. Resource allocations and priorities should be supported by objective data collected from school districts.

Advisory committees should be appointed to assist the joint committee in its work. Members on these committees should be selected from many segments of the public, including students, parents, educators, members of governing boards, and persons with demonstrated expertise in appropriate areas of study.

When the process of setting goals and objectives has been completed and the evaluation design has been accepted and formalized for purposes of implementation and administration, the State Board of Education should be responsible for such implementation and should remain responsible for the continuing leadership role in the data-collection and evaluation process. The Legislature should indicate, by statute, what information should be reported, when it should be reported, and the resulting implications for further legislation.