

EDUCATION REFORM: OKLAHOMA SUPERINTENDENTS'

PERCEPTIONS OF HOUSE BILL 1017 FROM

1990 - 1995

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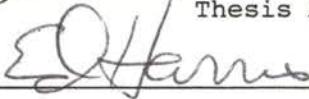
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It is with some trepidation that I write what is essentially the symbolic ending of another stage of what has become an series of enlightening educational experiences. Notwithstanding the excitement and some relief in "finishing," many of those who have shared, supported and contributed to the successful conclusion of this journey have proven to be more valuable than the journey itself. With this thought in mind, I would like to begin by recognizing those who have knowingly and sometimes unknowingly contributed to a lifetime of journeys which have culminated with this document.

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CHAPTER I

INTRODUCTION

Garreth Morgan (1990), in his book, Riding the Waves of Change: Developing Managerial Competencies For A Turbulent World, used the term "fracture lines" to illustrate his views regarding both business and education and how they have undergone radical transformation over the past two decades. Analogous to the geological conditions which affect earthquakes, Morgan's fracture lines describe points of change and transformation that have the potential to alter whole industries and services.

One such fracture line in educational reform began with a slight vibration of unhappiness with American public schools in the late 1970s. It rose to a rumbling of concern when reports of declines in student standardized test scores were published in the early 1980s. Finally, the tremors increased to a concern for public safety following release of A Nation at Risk: The Imperative for Educational Reform (National Commission on Excellence in Education, 1983) after a press forum in April of 1983 by then-President of the United States, Ronald Reagan. The findings in the report suggested that, when comparing the self-imposed mediocre educational performance of American school children to that same performance if imposed by an unfriendly foreign power, the decline in public education could be construed as an "act of war" (p. 5).

Both the "Nation at Risk" report and the manner in which it was presented to the American public set the stage for immediate efforts to demand educational reform. Accountability became an issue and, soon after the report's release, educational reform movements were initiated in every region of the Nation. Special governors' conferences were held to address educational shortfalls.

Legislative and business leaders also engaged in similar discussions. By the mid-1980s, detailed proposals for education reform began to surface. Many proposed reforms were merely rhetoric and fell short of adoption. Other reforms more closely followed the public mood for change, which demanded immediate care and action.

Leaders in Oklahoma were involved in one such reform effort, ultimately to become known as House Bill 1017. The development of "HB 1017" began in 1989 when then-Governor Henry Bellmon, with coaxing from his Secretary of Education Sandy Garrett and prominent state business leaders, called for a special session of the Oklahoma Legislature to address the needs of public education in Oklahoma.

In conjunction with the special session, a group of individuals identified as leaders in Oklahoma were appointed to a task force to develop specific recommendations for the improvement of education for the state's children. This group, Task Force 2000, was charged with the responsibility of conducting community meetings across the state to identify what Oklahomans wanted their educational system to look and be like and to present a report with recommendations to the Legislature. After much discussion and input from across the state, a report was prepared and presented to the

Legislature. Recommendations from the study conducted by Task Force 2000 were then reviewed, revised, and introduced in legislative form, House Bill 1017.

While much public discussion was held regarding HB 1017, it appeared that sufficient legislative support did not exist to pass the bill into law. Leaders of the Oklahoma Education Association called upon their membership to support the bill's passage by staging demonstrations at the State Capitol, picketing for support of educational reform and financing. Presenting an uncommonly united front, the Oklahoma Education Association, the Cooperative Council for Oklahoma School

Administration, and the Oklahoma State School Boards Association joined forces to press the Legislature to pass the bill into law. After much deliberation, and what amounted to a widely-sanctioned statewide teacher walk-out, the bill was approved by both houses and signed by Governor Bellmon.

As with other efforts to reform public education, both past and present, there has been concern voiced by both reformers and their critics as to whether the changes initiated by HB 1017 have, or will, really make a difference in the manner in which public education operates in Oklahoma. Michael G. Fullan (1991) addressed such concerns regarding the nature of change by suggesting that "change is a process--not an event" (p. 391). Fullan argued that there was a time frame for effective change, and suggested that minor change which is not complex would take from three-to-five years. More complex change would take from 5 to 10 years. He

indicated that changes in structure and changes in culture must go hand-in-hand and that change and progress aren't necessarily synonymous. He pointed out that phases of change can be viewed in five categories: adoption, implementation failure, implementation success, restructuring, or intensification. These will be addressed in Chapter II.

Fullan listed the two greatest enemies of change as time and resources. Without both, the chances of effecting real change are dimmed. Fullan listed three areas relevant to the process of successful change. He referred to them as the three "R's:" relevance, readiness, and resources. He indicated that these areas must be addressed in the evolutionary planning and empowerment phases that affect all of those involved in the change process.

Fullan used the term "second order change" to identify change through restructuring, described by characteristics such as vision, site based management, total quality management, shared decision making, and process. Referring to second-order change, Fullan suggested that changes made under this format create fundamental change as it relates to new goals, structure, roles, and the culture of the organization. He viewed this type of change as real reform.

"First order change," on the other hand, was characterized by the concept of change through intensification. Fullan cited targets of change, goals of school, quick fixes, and final product as elements of this type of change. First order change was referred to as change which addressed the efficiency and effectiveness of the existing model, thus providing an intensification of the existing

elements of that model. Fullan referred to this as "false clarity." Joel Spring (1993) referred to this type of change as that which would contribute to a sense of "false consciousness" regarding change.

Using this basic framework, it may be possible to consider how various components of 1017 have been implemented (or not implemented) over the past five years. The implementation of some elements has now been extended into the next century with speculation that they will never be subjected to actual implementation. Therefore, it may be important to determine what changes have actually been adopted and incorporated into the structure of Oklahoma public education as new and accepted reforms, following the concept of second-order change and what changes were adopted but have seen limited application, first-order change that has provided only token change and a sense of false clarity and false consciousness.

Statement of the Problem

Many in Oklahoma believed that the legislative adoption of HB 1017 in 1990 would lead to major changes in the way public schools operate in the state. Now, some question whether these changes have actually occurred and, if so, to what extent they should be perceived as truly structural or merely cosmetic change.

The purpose of this study was to identify the perceptions of superintendents in Oklahoma regarding the major changes resulting from HB 1017. Superintendents served as the target group since they,

as educational leaders, should be intimately involved in and knowledgeable of the reforms mandated by HB 1017. In addition, a study by Laurerman (1991) also of superintendents' perceptions provided baseline data. The first element of the study involved the identification of those reforms linked to HB 1017 that superintendents perceived to have had the greatest impact on public education in Oklahoma. Those were then compared to the reforms superintendents had expected to have the greatest impact, according to the earlier study done by Lauerman (1991). The second portion of this study then was focused on the collection of data regarding the perceptions of superintendents as to the degree and nature of change effected by each of those reforms.

The following research questions guided the analysis of the data

1. How do superintendents assess the impact and effectiveness of change and reform? How has that assessment changed since 1990?
2. To what degree do school superintendents support or oppose the reform efforts in Oklahoma? How has that perception changed since 1990?
3. Does the regional location, school district size, or superintendent's age, gender, or amount of experience affect the manner in which a superintendent perceives education change and reform?

Significance

This study may provide a careful compilation of the pre- and post-implementation perceptions of public school superintendents related to changes in public education as the result of the reforms adopted in HB 1017. The success or failure of reform issues, HB 1017 or others, may have more to do with factors that provide a favorable structure for change to occur than just leaving change or reform to pure chance. Because of the wide-ranging needs and factors that affect school districts across Oklahoma, Fullan's (1991) concepts of relevance, readiness and resources have varied meanings. Successful implementation of reform efforts for some schools may be positive, while having negative consequences for others. Perceptions as to what changes or reforms constitute what is best for Oklahoma students are influenced these by differences.

The fact remains that models to achieve successful change are continuing to be researched and developed. The findings of this study may provide some insight into the differences in perceptions among school superintendents and the significance that these perceptions may play in the successful implementation of reform efforts, including those found in HB 1017.

Limitations of the Study

This study was limited to those public school superintendents employed in independent school districts in Oklahoma during the 1994-1995 school year. No personnel from private, parochial, or elementary school districts were included in the population or

sample. Perceptions of other educators, state lawmakers, business leaders, or other citizens were not considered in this study.

The data gathered through this study reflect the reported perceptions of the individual public school superintendents. As such, the quality of the data is dependent upon the honest and true responses of the respondents. Perceptions may change over time, due to a number of factors, any of which could affect the accuracy of data. It was also assumed that superintendents of independent school districts in Oklahoma are familiar with the content and the impact of reforms contained in HB 1017.

Only those HB 1017 changes identified by Lauerman (1991) and by subsequent activities done for this study were considered. Persons in positions other than superintendents may identify other aspects of HB 1017 as having had greater impact than those reforms identified herein.

The instrument used by Lauerman (1991) has been modified for this study and should not be considered to have been standardized.

Summary

In summary, Chapter I has addressed, briefly, the history of the educational reform movement beginning in 1970. A review of the report, A Nation at Risk: The Imperative for Educational Reform, was highlighted to indicate the significance it had had on state reform efforts, including HB 1017 in Oklahoma. Also introduced was the research conducted by Fullan (1991) regarding the difficulty related to real change and the stages which must be

accomplished in order for change to become successful. The significance of this study was related to models of change and to how differing factors related to specific change efforts impact differently all parties involved. This impact may have an influence on not only perceptions of change but whether change may be viewed as merely intensification (more of the same) or restructuring (creating real change).

Chapter II of this study contains a review of the literature regarding Fullan's (1991) theory of change, as well as a national and a state review of the education reform movement since the early 1950s. Chapter III is used to describe the research design utilized in this study. The results of the data collection and analysis are provided in Chapter IV. The summary, conclusions, recommendations, and commentary are found in Chapter V.

CHAPTER II

REVIEW OF THE LITERATURE

This chapter is organized by four related topics from a review of literature regarding change. The first section is used to provide some understanding related to the process of educational change with emphasis on the work of Michael Fullan (1991). The second segment is focused on the public school superintendent's perspective of change. The third part of this chapter is used to summarize the legislated changes that occurred in Oklahoma public education during the decade of the 1980s and beyond. Finally, the fourth portion of the chapter is used to specifically address the changes that have been attributed to House Bill 1017 and related legislative efforts made subsequent to its passage.

Fullan's Perspectives on Change

It has been suggested by Michael Fullan (1991) in his book The Meaning of Educational Change that, in order to achieve a real perspective of change in education, a global view must be established. He suggested that "it is essential to understand both the small and the big pictures" (Fullan, 1991, p. xi). In the first part of his book, Fullan attempted to provide an overview of the sources, processes, and outcomes of change, as well as the implications from dealing with change. The second part of the book

relates to those who are faced with the daily realities of change. The viewpoint of the district administrator will be highlighted as a part of this literature review regarding change.

Fullan (1991) made an argument for the value of planned change, suggesting that a person can become "good at change" (p. xiii). "Change for change sake" is not an issue within this argument; rather, the challenge is knowing when to reject some changes, when to pursue and implement others, and, finally, how to develop the essential coping skills to deal with those outwardly imposed changes. Fullan went so far as to suggest that many of the contemporary reform initiatives were merely "non-events" or "superficial changes" rather than normative ones (p. xiii). Fullan argued that the inertia of the present structure which perpetuates a sense of status quo is a strong force which is held together in many ways. "If a healthy respect for and mastery of the change process does not become a priority, even well-intentioned change initiatives will continue to create havoc among those who are on the firing line" (Fullan, 1991, p. xiii). He suggested that the resistance to change is not as significant an issue as the fact that people just do not know how to cope with change.

The Reality of Change

According to Fullan (1991), there is intense disagreement regarding educational change. The issue is not so much whether the change is good or bad but rather whether the change that has been suggested to have occurred is really "nothing new under the sun"

(Fullan, 1991, p. 3). He argued that there is a great deal of confusion between the terms "change" and "progress." He suggested that one can become more progressive by resisting some change than by simply adopting it. "One must have a clear coherent sense of the meaning about what educational change is for, what it is, and how it proceeds" (Fullan, 1991, p. 4). When the phenomenology of change, how people experience change, is ignored, the sociopolitical process is also ignored, and the potential for change is precluded. Fullan argued that people must know both the "what" of change as well as the "how" of change (Fullan, 1991, p. 5). Use of this what-how theory can avoid the pitfall of being certain of what one wants to achieve yet knowing nothing about the means by which such achievement may be secured or, on the other hand, to be completely knowledgeable regarding the change process, while seeking change that is unneeded or of a low priority.

Fullan (1991) noted that changes have occurred in educational practice, citing four phases regarding such changes since the 1960s. He referred to the first as the "adoption" phase which occurred in the 1960s. He also referred to this as the "Sputnik era" when new math, radical revisions in chemistry and physics, open education, and individualized instruction were grouped into a mentality of "innovations," the more the better (Fullan, 1991, p. 5). Rejection of some of the "empty-headed innovation" of this phase, according to Fullan, could have been predicted to occur, and it did. The second phase (1970-77), which Fullan called

"implementation failure," was the period during which educators failed to put the innovations of the 1960s into practice.

The third phase (1978-82), which Fullan (1991) referred to as "implementation success," many programs such as school improvement, effective schools, and staff development developed independently of one another through research and practice. These were viewed as "quick fix" types of changes and were quickly attacked by the National Commission on Excellence in Education (1983). Their report, commonly referred to as "A Nation At Risk" began the fourth and final phase (1983-1990) that Fullan described as "intensification vs. restructuring."

The intensification phase was deemed by many to be one wave of reform which originated in state legislation involving curriculum alignment, mandated textbooks, and standardized testing to measure, evaluate, and monitor this intensification of what already existed (Wise, 1988; Corbett & Wilson, 1990; Firestone, Führman, & Kirst, 1989a). The other wave of reform involved such programs as school-based management, participatory decision making, integration of multiple innovations, collaborative work cultures, teacher education program restructuring, and a combination of efforts among staff, administration, and community to create a shared mission (Harvey & Crandall, 1988; Elmore, 1989; Murphy [in press]).

Fullan made three points in his discussion of these two opposing waves in the change process.

First, unlike previous attempts, the new waves of reforms are comprehensive. Their intent is to bring about systematic change from top to bottom or vice-versa. Second, the two approaches are

philosophically and politically at odds, although since politics makes strange bedfellows we can expect combinations of elements of the two approaches to be integrated in some situations (Firestone et al., 1989a). Third, because the stakes are so high, it is all the more important to pay attention to the process of change. While previous change initiatives were not as comprehensive in scope and required less energy for implementation, there has been a steady accumulation of knowledge about the change process. There is indeed a strong base of evidence available about how and why educational reform fails or succeeds (Fullan, 1991, p. 7).

Fullan suggested that the educational reform efforts in the 1990s would be more comprehensive and backed with more resources and follow-through than ever before. He also suggested that those efforts would raise two essential questions: "What are schools for?" and "What is reform for?" Responses to the first are often categorized into two specific areas: (1) to educate students in various academic or cognitive skills and knowledge and (2) to educate students in the development of individual and social skills and knowledge necessary to function occupationally and sociopolitically in society (Bowles & Gintis, 1976; Sarason, 1990; Schlechty, 1990).

The second question, in theory, is purposed as assisting "schools to accomplish their goals more effectively by replacing some structures, programs, and/or practices with better ones" (Fullan, 1991, p. 15). Fullan was quick to point out, however, that "change for the sake of change will not help" (p. 15). He argued that the failure of educational change

may be related just as much to the fact that many innovations and reforms were never implemented in practice (i.e., real change was never accomplished) as to the fact that societal, political, and economic

forces inhibit change within the educational system (p. 15).

It has been argued that individuals and groups at all levels can accomplish major improvements if they pay attention to both the content and the process of educational change (Fullan, 1991; Barth, 1990; Schlechty, 1990). According to Fullan, a passive understanding of change is not enough, but rather only by taking action can a deeper meaning be established.

Fullan used the work of Levin (1976) to provide three broad ways in which pressures for educational policy change may arise:

1. through natural disasters such as earthquakes, floods, famines, and the like;
2. through external forces such as imported technology and values, and immigration; and
3. through internal contradictions, such as when indigenous changes in technology lead to new social patterns and needs, or when one or more groups in a society perceive a discrepancy between educational values and outcomes affecting themselves or others in whom they have an interest (Fullan, 1991, p. 17).

Fullan's argument that pressures for educational change will increase as a pluralistic society, such as that found in the United States, becomes more complex. With this complexity, newly created, competing versions of change will emerge which will foster both choices and impositions. It will be increasingly difficult to determine which changes represent intensification and which represent restructuring.

Fullan suggested that the sources of innovations may provide some key to their hidden intent or real purpose. He used the example of open-education in the 1960s to illustrate the point by suggesting that its American adoption was an imitation of the

British model whose value was fueled by university-based supporters. He argued that many superintendents blindly pursued the innovation in order to be viewed as progressive and to increase future employment potential, all the while assuming that the "progressive innovation" was a good one (Fullan, 1991, p. 20).

Another example of sources of innovation was revealed by studies carried out at the Rand Corporation (Berman, McLaughlin, Pincus, Weiler, & Williams, 1979). After investigation of 293 change projects in school districts, it was determined that decisions to participate in reform efforts were generated from two areas: opportunism (to reap federal funds) and problem solving (to meet local needs). Of the two categories, the changes which appeared to have the greatest staying power were those related to local needs. Silberman (1970) suggested that the reason the reform movement of the 1970s failed was "the fact that its prime movers were distinguished university scholars" (p. 179). The value of their scholarly contributions, once assumed to be its greatest strength, turned out to be reform's greatest weakness.

Fullan (1991) questioned whether educational reform coming from the government provides legitimacy for the educational base for decisions made regarding innovations. He used a study conducted by Boyd (1978) to illustrate the point that advisors could be characterized as those who tended to measure their success by the number of things they got started. The implications of the Boyd study suggested that innovation itself, not the content of innovation, was valued by these individuals. Many of the programs

that had been studied, in fact, had faded after two to three years.

Corbett and Wilson (1990) questioned "intensification" reforms by reviewing the statewide public school testing mandates which had been initiated in Maryland and Pennsylvania. While it was determined that statewide testing reforms did cause action at the local level, in doing so, however, they also narrowed not only what was presented as curriculum in the classroom but also narrowed course offerings, an action which ultimately led to conditions which were adverse to change. Other unintended consequences of the testing reforms included diversion of attention and energy, as well as reduced teacher motivation and morale. Corbett and Wilson suggested that,

when the modal response to statewide testing by professional educators is typified by practices that even the educators acknowledge are counter productive to improving learning over the long term, then the issue is a policymaking problem (p. 321).

Apple (1988) found that, in an effort to address such testing mandates, increased specification occurred and prespecified lists of competencies, pretests and posttests, recordkeeping, and other requirements all led to what he called "intensification of labor." Apple suggested that "getting done" took precedence over getting the job done well. Both the Corbett and Wilson and the Apple studies may have significant implications for the "de-skilling of teachers" (Foster, 1988). Fullan (1991) suggested that the general conclusion to be reached by his study on related innovation sources is that "one must be wary of innovation and reform, not because the intention of reformers is evil, but because the solution might be

wrong, unimplementable or create adverse side-effects" (p. 25).

Fullan (1991) summed up his study on innovations by suggesting that there are two major lessons to be gained. First, he argued that the worth of particular policies or innovations cannot be taken for granted because of uncertainties regarding the purposes, possibilities for implementation, or actual outcomes. He indicated that educational innovations should not become ends in themselves. Second, Fullan used Sarason's categorization of first and second order change to lend some insight as to why some changes have been more successful than others.

Sarason (1990) described first-order changes as those that improve the efficiency and effectiveness of what is currently done "without disturbing the basic organizational features, without substantially altering the way that children and adults perform their roles." (p. 342). Second-order changes seek to alter the fundamental ways in which organizations are put together, including development of new goals, structures, and roles. Fullan (1991), basing his comments on the findings of Sarason's study, suggested that most changes since the turn of the century have been first-order changes, primarily aimed at improving the quality of what already existed.

Second-order changes were either adapted to fit what existed or sloughed off, allowing the system to remain essentially untouched. The ingredients change, the Chinese saying goes, but the soup remains the same (Cuban, 1988a, p. 343).

Fullan (1991) predicted that the challenge for the 1990s was the need to deal with more second-order changes. He suggested that

those are "changes that affect the culture and structure of schools, restructuring roles and reorganizing responsibilities, including those of students and parents" (p. 29).

The Meaning of Change

Because change is omnipresent in people's lives, it seems that they seldom consider what it means to themselves or to those around them who also experience the change (Fullan, 1991). Yet to understand and grasp the all-encompassing meaning of change, Fullan provided a four-part clarification for the "meaning of change" (Fullan, 1991, p. 30). First, he began with the general problems regarding the meaning of change. He cited Loss and Change (Marris, 1975) to suggest that change, whether voluntary or imposed, involves loss, anxiety, and struggle. The Marris study suggested that understanding the anxieties of loss provides for a clearer picture regarding transition. Marris (1975) used the word "ambivalent" (p. 7) to describe the attitude of individuals toward change, no matter the circumstance surrounding it. He argued that innovation cannot be assimilated unless its meaning is shared. It was suggested that those involved in the change process must experience it from their own realities before change can be accomplished. Fullan then suggested that "real change, whether desired or not, represents a serious personal and collective experience characterized by ambivalence and uncertainty" (Fullan, 1991, p. 32).

The second area that Fullan described regarding the meaning of change is in the subjective realm. He used a study of teachers by

Crandall (1982, p. 29) to describe what, according to the study, appeared to be the subjective reality of teachers called the "classroom press." The Crandall study findings suggested that the classroom structure affects teachers in a number of different ways: it draws their focus to day-to-day effects of a short-term perspective, it isolates them from other adults, it exhausts their energy, and it limits their opportunities for sustained reflection about what they do (Crandall, 1982, p. 29). The results of the study seem to suggest that teachers become dependent upon experiential knowledge essential to cope from day-to-day, rather than seeking sources of knowledge beyond their own classroom experience. In other words, the subjective reality of the teacher is that which is constructed in the everyday activity of that particular teacher. Thus, new ideas or changes do not fit into the subjective reality that exists for that teacher. Wise (1977, 1988) referred to this as the hyperrationalization of change. There becomes very little reason for the teacher to believe in any change and few incentives to determine if any change is worthwhile. Fullan suggested that, in fact, two types of "non-change" develop: false clarity without change and painful clarity without change. He went on to describe that "false clarity occurs when people think that they have changed but have only assimilated the superficial trappings of the new practice" (Fullan, 1991, p. 35). Painful unclarity was said to be experienced when unclear innovations are attempted under conditions that do not support the development of the subjective meaning of change. Loucks and Hall (1979) suggested

that the ideas of those who introduce change are not synchronized with the subjective reality of those who are asked to implement that change. Lortie (1975) suggested that teachers are conservative, individualistic, and focused on the present. Cooper (1988) found that change from the outside is thus bitterly resented by teachers. He suggested that "outside looking in" is different than "inside looking out" and change is viewed as threatening and confusing. Finally, Marris (1975) was cited by Fullan to suggest that there was a strong tendency for people to adjust to the "near occasion" of change, by changing as little as possible. Fullan concluded his comments on the subjective implications of change by suggesting that "ultimately the transformation of subjective realities is the essence of change" (Fullan, 1991, p. 36).

The third area regarding the meaning of educational change is related to objective reality. While Fullan (1991) explained that the concept of objective reality is "tricky," he provided an explanation of that reality by suggesting that it is always defined by individuals and groups through their interactions or social phenomena (e.g., constitutions, laws, policies, educational change programs). Whether these symbolize the subjective concepts of the producers of change is problematic. Berger and Luckman (1967, p. 116) suggested that the questions, "What is the existing conception of reality on a given issue? Says Who?" should be used to address the issue.

Fullan identified his fourth element of the meaning of educational change as that which has implications for subjective and

objective realities. He cited six major observations. First, are the proposed changes sound? If they are authentic, are the subjective and objective realities of individuals approachable? Second, is there an understanding of why well-intentioned change fails? New programs can be adopted naively without considering all the implications. Third, have guidelines for understanding the nature and feasibility of changes been addressed? Are the goals specific and clear, but the means of implementation vague? Are the beliefs and goals abstract, vague, and unconnected with other dimensions? Is the number of changes implied, overwhelming or, when joined, incoherent? Fourth, is the status quo so fixed that it leaves little room for change? Fifth, is change so deep that it cannot overcome the core of learned skills and beliefs and challenges, purposes, sense of competence, and self-concept? Finally, who determines whether a change is of value and how do they relate it to others?

Fullan summed up his thoughts in the meaning of change by suggesting that to say that "meaning matters is to say that people matter--change works or doesn't work on the basis of individual and collective responses to it" (Fullan, 1991, p. 46).

The Process of Change

The next major area that Fullan considered was a description of the educational change process and an explanation of why it works as it does. He began by arguing that, rather than citing hard-and-fast rules regarding change, it was more realistic to discuss a set of

suggestions or implications. He argued further that research by Firestone and Corbett (1987); Fullan (1985); Clark, Lotto, and Astuto (1984); and Huberman and Miles (1984) suggested that "the uniqueness of the individual setting is a critical factor--what works in one situation may or may not work in another" (Fullan, 1991, p. 47).

Fullan divided the change process into three phases. Phase I was referred to as the initiation, mobilization, or adoption phase. It generally described the process that led up to and included a decision to adopt or proceed with a change. Phase II was defined as the implementation or initial use phase, focusing on the first experiences of attempting to put an idea or reform into practice. Phase III was labelled as the continuation, incorporation, routinization, or institutionalization phase. It typically was the phase that determined whether the change was incorporated as an ongoing part of the system or disappeared by way of attrition or a decision to discard. Fullan described the total time frame from initiation to institutionalization as lengthy with "moderately complex changes taking from three to five years and major restructuring efforts from five to ten years" (Fullan 1991, p. 49). Most importantly, Fullan suggested that "change is a process, not an event" (Fullan, 1991, p. 49).

Fullan defined initiation as that process leading up to and including the decision to proceed with implementation. He noted that this phase is usually marked by a plethora of innovations

suggested from every aspect of society. Fullan argued that, since 1983, a struggle between standardization and restructuring has produced changes that both limit and liberate change possibilities. One example was taken from the work of Wise (1988) who studied the linkage of textbooks and curriculum to with state standardized state tests. Fullan suggested that many times educational changes have been adopted without any clear notion as to their specific meaning. Because of this, many new notions of innovation received extreme scrutiny prior to implementation or adoption. As discussed earlier, pluralistic nature and complexity of the United States create the likelihood that there would be the introduction of many innovations into the educational change environment.

Access to information by those involved in the initiation process played a factor in understanding introduced innovation. Those individuals who had more opportunities to become informed through conferences and professional networks had more of an understanding of the suggested innovation. Teachers who were limited in their personal and professional contacts would have less understanding. Those individuals who had limited formal education had the least opportunity to understand and thus to accept new innovations.

Fullan (1991, p. 54) argued that initiation of change "never occurs without an advocate." He suggested that one of the most powerful advocates in the school district is the chief district administrator. Huberman and Miles (1984, p. 55) found that "central office administrators were at the locus of decision-making in 11 of

12 cases." Using this premise, central office administrators could be found to be equally powerful in blocking changes they did not like (Fullan, 1991).

Teacher advocacy for innovative changes was found to be reliant upon opportunities for interaction and sharing of information. Because most teachers did not have adequate information access, time, or energy, the innovations that they would adopt would likely be individualistic (Fullan, 1991).

Community support for innovation was contingent upon several factors, according to Fullan (1991). He argued that when major demographic changes occurred, turbulence in the environment may lead to the initiation of change. However, on the average, most community members did not actively participate in change decisions regarding educational programs. Fullan also noted that citizens in more highly educated communities seemed to put more pressure on their school leaders to adopt high-quality, academic-oriented changes. They also were more likely to react to changes they did not like. Those in less well-educated communities were found to be less likely to initiate change or to put pressure on educators to make changes on their behalf.

New policy and accompanying funding were suggested to create an environment for innovation. Fullan (1991) indicated that new state or federal government policies stimulated, and sometimes required, initiation of change at the local level, especially when accompanied by funding. Most of these programs were the result of lobby groups and reform-minded policy-makers according to Fullan (1991).

Berman and McLaughlin (1977) conducted a study which suggested that program adoption decisions in school districts were characterized by either an opportunistic or problem-solving orientation. If funding became available that would assist in the solution of a local problem, district leaders were more likely to decide to participate. However Pincus, in a study conducted in 1974, discovered that districts decision makers were more likely to adopt new instructional processes that did not significantly change structure because such innovations helped satisfy the demand of the public without exacting heavy costs. Pincus also found that school boards and administration adopted complex, vague, inefficient, and/or costly (if someone else is paying) innovations as long as someone else was paying and they did not have to implement them fully. This supported Cuban's conclusion that superficial changes in content are more likely to occur than structural changes in role behavior and conceptions of teaching. The first-order changes in content were more likely to be implemented than second-order changes in role and culture (Cuban, 1988a,b).

Nelson and Sieber (1976) found that the political and symbolic value of initiation of change in schools was often of greater significance than the educational merit or the time and cost necessary for implementation follow through. They also found that such symbolism could be necessary for political survival and would often set the preconditions for real change in practice.

In his summary of the myriad of causes and processes of initiation, Fullan (1991) suggested that change is and would

always be initiated from a variety of different sources and combinations of sources. Fullan (1991, p. 63) cited the "three R's of relevance, readiness, and resources" as the ideal elements for successful initiation. Relevance, as suggested by Fullan, included the interaction of need, clarity of the innovation, and utility, or what the change really has to offer to teachers and students. Fullan identified the second element of initiation as readiness and described it as the school's conceptual capacity to initiate, develop, or adopt a given innovation. He identified two factors affecting readiness as individual (Does it address a perceived need? Was it reasonable? Does one have the knowledge and skills to understand it?) and organizational (Is it compatible with the culture of the school? Are facilities, equipment, materials, and supplies available? Are there other change efforts that would interfere with implementation?). The third element is resources, without which a good and pressing idea is just that--an idea without resources to complete it.

Finally, Fullan wrote that the process of initiation can generate meaning or confusion, commitment or alienation, or knowledge or ignorance on the part of the participants and others affected by the change. However, he suggested that not only could "poor beginnings become successes during the implementation stage," but "promising start-ups could be squandered by what happens afterwards" (Fullan, 1991, p. 64).

Fullan defined the term implementation as "the process of putting into practice an idea, program, or set of activities which

is known to the people attempting to bring about a change" (Fullan, 1983, p. 216). He suggested that a large part of the problem regarding change was the difficulty related to planning and coordinating a multilevel social process involving thousands of people (Fullan, 1991, p. 65). He argued that many of the change "adoptions" did not get implemented in practice even when desired because the process beyond adoption is more intricate because it involves more people and real change rather than written or verbal suggestions for change. Implementation became critical for the simple reason that it was the means of accomplishing desired objectives.

Fullan (1991) categorized a number of key variables related to implementation in two distinct ways. First, he identified a list of factors associated with implementation success. Second he depicted the main themes that contributed to implementation success. He argued that the "more factors supporting implementation, the more change in practice will be accomplished" (Fullan, 1991, p. 67).

Fullan identified three main categories of factors that affected implementation. Characteristics of change was the first of the three and had four subcategories: need, clarity, complexity, and quality/practicality. Innovations had to be seen as addressing what are perceived to be priority needs if they were to be effective. Many times precise needs were not addressed clearly until the implementation was actually underway. It was during the early implementation stages that early rewards and tangible successes were found to be critical incentives (Huberman & Miles, 1984). Fullan

suggested that many times "disillusionment, burn out, cynicism, apathy, etc. come to characterize many people's orientation to all changes that come along" (Fullan, 1983, p. 21). Clarity was the second area under characteristics of change. Fullan noted that, in a study conducted by Gross, Giacquinta, and Bernstein (1971), many teachers agreed that change was needed but were unclear about what they should do about it. Creating further conflict for clarity was the tendency of legislation and new policies and programs to be phased deliberately in generalities to avoid conflict and to encourage acceptance and adoption. The irony is that the more complex the change, the greater the problem of clarity for implementation following adoption under less complex understanding. The conflict between the elements of need and clarity was found to be both obvious and problematic. Fullan (1991, p. 70) referred to the overgeneralization and simplification of implementation as "false clarity." Complexity was the third category of characteristics of change and referred to the amount of difficulty and the extent of change required of the individuals responsible for implementation. Fullan cited the work of Berman and McLaughlin (1977) who found that "ambitious projects were less successful in absolute terms of the percent of the project goals achieved, but they typically stimulated more teacher change than projects attempting less" (p. 88). Fullan then suggested that simple changes, while successful, would not make much of a difference. The fourth and final characteristic of change was the category of quality and practicality of programs. Implementation had to be as

important as adoption in this process of change. If not, the follow-up and preparation time necessary to generate adequate materials lessened the quality of the final product. Further, the changes that were suggested had to be practical and fit well within the teachers' situations. Those that did not fit practically, even though of high quality, were destined for trouble in implementation.

The second interactive factor affecting implementation was local characteristics: the district administrators, community and school board, principals, and teachers. Fullan suggested that local school districts represented "one major set of situational constraints or opportunities for effective change" (Fullan, 1991, p. 73). He argued that a program which has proven to be successful in one district may be a disaster in another due to this factor and suggested that the historical experience of a previous implementation could create cynicism or apathy regarding new innovation. However, he also cited the work of Berman and others (1979) who found that the support of central administrators for change was critical to its successful implementation. District administrators affected the quality of implementation to the extent that they understood and helped to manage the set of factors and the processes of change (Fullan, 1991). The second element of local characteristics was board and community characteristics. In a study conducted by Corwin (1973), it was found that community support of the school was correlated positively with innovativeness. Further, Fullan suggested that school boards could indirectly affect implementation by hiring or firing reform-oriented superintendents.

When school board members and the district administrators actively worked together, substantiated improvements were achieved as compared to conflict-oriented or uninvolved boards (LaRocque & Coleman, 1989b). While much of the major research on innovation and school effectiveness has showed that the principal strongly influences the likelihood of change, it also indicated that most principals did not play instructional or change leadership roles (Berman & McLaughlin, 1977). Fullan suggested that many principals felt exactly as teachers did regarding change implementation, "other people did not seem to understand the problems they face" (Fullan, 1991, p. 77). The fourth and final area of local characteristics was the role of the teacher. Huberman (1988), Hopkins (1990), and McKibbin and Joyce (1980) were all cited as having found that the psychological state of a teacher could be more or less predisposed toward considering and acting on improvements. Teachers' subjective reality played a role in whether they had a greater or lesser sense of efficacy regarding successful change implementation. Fullan suggested that, in the final analysis, "it was the actions of the individual that counted" (Fullan, 1991, p. 77). Fullan also suggested that people became more committed as a result of involvement than as a prelude to it. An investment in assistance to and sharing with teachers during this period was determined to be essential to successful change implementation (Fullan, 1983, p. 36).

The third interactive factor affecting implementation was external factors, mainly the government and other agencies.

Fullan argued that government agencies have been preoccupied with policy and program initiation and have ignored the problems associated with the processes of implementation, an example of the policy-maker ignoring the subjective world of the local practitioner. In order to overcome this difficulty, Fullan suggested that leaders of local school systems and external authority agencies learn to establish a "processual" relationship with one another that combined both "paperwork and people work" (Fullan, 1991, p. 79).

Having described the key factors in the implementation process, Fullan turned his attention to the identification of the key themes in that process. He argued that individual roles and lists of factors, while important, pale in comparison to the implications of key themes in successful improvement efforts (Fullan, 1991). Using a study conducted in 1990 by Louis and Miles, Fullan cited five major themes: vision-building, evolutionary planning and development, initiative-taking and empowerment, resource and assistance mobilization, and problem-coping. Fullan then added a sixth area, restructuring, suggesting that "altering the organizational arrangements and roles in schools was essential to reform" (Fullan, 1991, p. 81). Vision-building was the first topic addressed by Fullan under key themes of implementation. Miles (1987) had suggested that vision involved two dimensions. The first, a shared vision of what the school should look like, provided direction and driving power for change and criteria for steering and choosing. The second type is a shared vision of what strategy could

be used for getting the change accomplished. Fullan suggested that, while everyone agreed that vision was crucial, the practice of vision-building was not well understood. The second of the key themes of implementation cited by Fullan (1991) in regard to the work of Louis and Miles (1990) was that of evolutionary planning. Some of the most successful schools adapted their plans along the way to improve the "fit" between the change and the conditions in the school to take advantage of unexpected developments and opportunities (Louis & Miles, 1990). The third key theme was that of initiative-taking and empowerment. Louis and Miles (1990) had suggested that power sharing was crucial when it comes to implementation. Extending involvement and influence to others who may be impacted by the innovation, without losing complete control, was a delicate but essential element of this theme (Fullan, 1991). Resource and assistance mobilization was found to be the fourth theme of implementation. Staff development was seen as an important component within this theme. While the amount of staff training was not necessarily related to the quality of implementation, it could be a key factor if it combined pre-implementation training with assistance during implementation and used a variety of trainers (Huberman & Miles, 1984; Louis & Rosenblum, 1981). The fifth area under key themes was monitoring/problem-coping area. Fullan suggested that monitoring the process of change was just as important as measuring outcomes.

Since the monitoring process allowed for information on innovative practices to spread to others by providing access to good

ideas. It also exposed these ideas to the scrutiny of others and weeded out mistakes while further developing promising practices. Finally, Fullan added the sixth key theme of implementation, restructuring. He suggested that time for individual and team planning, joint teaching arrangements, staff development, revised policies, new roles such as mentors and coaches, and school improvement procedures were examples of structural change at the school level that would be conducive to improvement (Fullan, 1991).

Fullan closed his discussion of the process of implementation of change with a review of the factors connected to the continuation of initiated reforms. Berman and McLaughlin (1978) had found that a lack of public interest, an inability to fund special projects or staff development from district funds, and staff opposition or apathy by continuing and new teachers led to the demise of many implemented programs. Further, lack of interest and support at the central district office was another reason for noncontinuation. In those cases in which continuation was sustained, all of these aforementioned factors existed. Huberman and Miles (1984) stressed that continuation or institutionalization of innovations depended on whether or not the change became embedded or built into the structure, had generated a critical mass of administrators and teachers who were skilled in and committed to the change, and had an established procedure for continued assistance, especially relative to supporting new teachers and administrators. One of the most powerful factors found to take its toll on continuation was

staff and administrative turnover (Berman & McLaughlin, 1977; Huberman & Miles, 1984).

Insights on Change

Fullan (1991) offered some perspectives on the change process by identifying four main insights which, while important, are not necessarily predictable. The first was active initiation and participation. Fullan suggested that "starting small and thinking big" was part of the key to successful implementation. Developing a bias for action, learning by doing, and moving in a desirable direction were all components of this first insight as were participation, initiative-taking, and empowerment.

Second, Fullan found pressure and support as essential to successful initiation of change and continuation of the change implementation. He suggested that "pressure without support lead to resistance and alienation; support without pressure lead to drift or waste of resources" (Fullan, 1991, p. 91). Third, changes in behavior and beliefs were critical to sustained implementation. Fullan suggested that, when people tried something new, they often suffer what he referred to as "the implementation dip" (Fullan, 1991, p. 91). Joyce and Showers (1988) had also suggested that things get worse before they get better and clearer as people grapple with the meaning and skills of change.

The fourth and final perspective on the change process was the role of ownership. Fullan wrote that true ownership is not something that occurred magically at the beginning of the successful

change process but rather was something that came out at the other end. Fullan summarized the broad implications of the implementation process by suggesting that individuals have to develop new meaning as parts of a gigantic, loosely organized, complex, messy social system that contained a myriad of different subjective worlds. He went on to argue that to bring about effective change, people need to be able not only to explain what causes change but to understand how to influence those causes. To implement programs successfully, people need to develop better implementation plans and, to accomplish this, they have to know how to change the planning process; in turn, to know how to change our planning process, they must know how to produce better planners and implementers (Fullan, 1991).

Planning for Change

Fullan (1991) used the term "intractability" to describe the collective attempts to provide reason for the process of change. He pointed out, however, that merely because change was difficult to manage or govern, it could still be accomplished. With this premise in mind, he cited four major aspects of the problem of planning educational change: why planning failed, success is possible, planning and coping, and the scope of change. He addressed the first topic, why planning failed, by a discussion of faulty assumptions and ways of thinking about change. Fullan suggested that, because policy-makers were frequently "hyperrational" (Wise, 1977, 1979, 1988), the very commitment of reformers was, in

itself, problematic. He argued that the "commitment to what should be changed often varied inversely with knowledge about how to work through a change process" (Fullan, 1991, p. 95). Failure to listen and impatience were two of the enemies of this commitment. He suggested that a more balanced viewpoint of commitment and skill in the change process was a key to successful change. Lighthall (1973) had used a critique of the Smith and Keith (1971) case study to suggest that educational change was a process of coming to grips with the multiple realities of people who are the main participants in implementing change. Fullan stated that "innovators who are unable to alter their realities of change through exchange with the would-be implementers can be as authoritarian as the staunchest defenders of the status quo" (Fullan, 1991, p. 95). By ignoring multiple realities, planners or decision-makers of change were often unaware of the situations that potential implementers were facing. Wise (1977) provided further support by suggesting that,

when policy makers require by law that schools achieve a goal which in the past they have not achieved, they may be engaged in wishful thinking. Here policy makers behave as though their desires concerning what a school system should accomplish will, in fact, be accomplished if the policy makers simply decree it (p. 45).

Patterson, Purkey, and Parker (1986) argued that organizations follow complex logic that is paradoxical and contradictory yet understandable and amenable to influence. They provided two major themes which were divided into five subthemes. The first major theme was the rational model which purported that change in procedures would lead to improvement. The second theme dealt with the nonrational model which suggested that organizations did not

behave in a logical, predictable manner. They set about contrasting these two areas with five dimensions: systems are guided by multiple and competing goals; power is distributed throughout the organization; decision making is a bargaining process designed to arrive at solutions to satisfy implementers; the external environment defines public influences that create unpredictability of acceptance of change; in the teaching process, effective teaching practices are many times situational.

The second reason why planning fails was unsolvable problems. Fullan (1991) suggested that many problems were so complex that, in some cases, they defied solution. He argued that, on many occasions, statements of goals for educators ignored the basic question of whether the goals were attainable. Wise (1977) stated it this way

To create goals for education is to will that something occur. But goals, in the absence of a theory of how to achieve them, are mere wishful thinking. If there is no reason to believe a goal is attainable--as perhaps evidenced by the fact that it has never been attained--then a rational planning model may not result in goal attainment (p. 48).

Fullan used Schon's study (1971) to suggest that there were two issues regarding the difficulty of the change process. The first was that, with complex social problems, the total number of variables was so large that it was logistically infeasible to obtain all the necessary information and cognitively impossible for individuals to comprehend the total picture even if the information became available. The second issue suggested that, even if experts

were able to comprehend the total picture themselves, theories and experiences with meaning and implementation suggested that they would have a "devil of a time" getting others to act on their knowledge--partly because the process of implementation contained so many barriers that have nothing to do with the quality of knowledge available. With this argument in mind, Fullan suggested that planning for change failed partly because of the assumptions of planners and partly because the problems were simply not solvable.

The second of the four major areas dealing with the problem of planning educational change was that "success is possible" (Fullan, 1991, p. 100). Fullan argued that planned change is possible and described settings that had been deliberately transferred from one state to another. He used a study by Berman and others (1979) to suggest that, in one school district, major changes were accomplished over a period of seven years by the following actions: hiring a new superintendent, creating a new role for central district personnel, transferring school principals and establishing new expectations and training for the role of principals, creating incentives and opportunities for teachers to obtain resources for changes that they proposed, establishing a teachers' center and other activities to stimulate teacher interaction and professional development, and obtaining added resources through federal innovative programs. Fullan suggested that certain themes appeared in successful change situations: active leadership, professional work environments, positive learning

opportunities, broad community involvement, continuous improvement, and service to all students. Using this as a springboard, Fullan wrote that successful change was possible in the real world, even under difficult conditions.

Planning and coping was the third problem of planning for educational change. He began his discussion with a question, "What can we actually do to plan for and to cope with educational change?" (Fullan, 1991, p. 102). He attempted to answer this question by addressing three distinct areas: coping with change, planning and implementing change, and the scope of change.

Coping with change began with the suggestion that each initial stance should involve critical assessment. Was the change desirable in relation to certain goals? Was it implementable and worth the effort? Did it change an unmet need? Was it a priority in relation to other unmet needs? Did it have a desirable sense of vision? Were resources (both financial and leadership) adequate to support implementation? Fullan argued that if these questions could be answered in the affirmative, the process for change could be utilized effectively. He further suggested that, if they cannot be answered favorably, the likelihood of implementation was diminished. Fullan suggested that resisting change that was not realistic did not represent "irresponsible obstinacy;" rather, nonimplementable programs and reforms did more harm than good when they were attempted (Fullan, 1991, p. 104). Initial critical assessment was the key to determine whether rejection or internalization of an innovation was the most appropriate course of action.

Planning and implementing change was considered next in relation to planning and coping, a major aspect of planning educational change. To address this area, Fullan (1991) used two interrelated sets of issues: what assumptions about change were notable? How could planning and implementing change be done more effectively? Fullan identified ten areas related to assumptions about change. First, in the implementation process, the main purpose should be the exchange of realities with implementers and others concerned. Second, individual implementers must work out their own meaning with effective implementation and a process of clarification. Third, conflict and disagreement are not only inevitable but fundamental to successful change. Some have suggested that smooth implementation was often a sign that not much was really changing (Huberman & Miles, 1984). Fourth, while pressure is needed to create change, it is effective only under conditions that allowed individuals to react, form their own positions, and interact with other implementers. Fullan suggested that interaction with others was problematic because the architecture of schools promoted isolation, overload sustained it, the timetable reinforced it, and history sustained it. "There is a ceiling effect to how much can be learned if we keep to ourselves" (Stager and Fullan, 1992, p. 7). Fifth, effective change takes time and persistence is a critical attribute of successful change. Sixth, reasons for lack of implementation come in many forms: value rejection, inadequate resources, insufficient time. Seventh, most people or groups are not expected to change. The desire should be to increase the number

of people affected. Eighth, evolutionary planning and problem-coping models based on the change process are essential (also Louis & Miles, 1990). Ninth, no amount of knowledge can ever make clear what action should be taken. Tenth, to change the culture of the institution was the real agenda (Fullan, 1991, p. 107).

Fullan (1991, p. 107) then suggested that "assumptions, whether consciously or unconsciously held, constitute our philosophy of change." While change was not a fully predictable process, concentrating on planning for change helped identify factors which needed to be addressed, remembering not to neglect other factors in the process. Louis and Miles (1990) identified five conclusions from their studies on change:

- Effective evolutionary planning must be built on the direct involvement of the principal or some other key leader in the school (p. 199).
- Action precedes planning as much as follows it. Effective action . . . often stimulates an interest in planning rather than vice versa (p. 204).
- Multiple themes often precede mission statements: The more successful of our schools had no a priori mission statements. Multiple improvement efforts formed around themes (p. 206).
- It is best to start small, experiment, and expand the successful while contracting the less successful. Evolutionary planning assists in this process (p. 211).
- Leadership-dominated early planning must shift to shared control with teachers and others as evolutionary planning unfolds (p. 214).

Fullan ended this portion of his review of planning and implementing change by suggesting that "people get better at the change process by continuously acting and reflecting on the principles of effective implementation planning" (Fullan, 1991, p. 110).

The fourth and final aspect of the problem of planning educational change was the scope of change. Sarason (1990) had suggested that people still have not learned to focus their efforts on understanding and working with the culture of local systems. He argued that "the process of implementation required that you understand well the settings in which ideas have to take root, and that understanding was frequently faulty and incomplete" (p. 61). Fullan thus suggested that the pre-implementation issues of whether and how to start were essential to the planning approach, and attempted to put the problem of scope in perspective by establishing three points. First, the initial priority should be initiation, not implementation.

In the face of major value or power resistance, it is probably strategically more effective in the short run to concentrate energies on establishing new legislation, hoping that in the long run the pressure of the law, the promotion of implementation through incentives and disincentives, and the emergence of new implementers will generate results (Fullan, 1991, p. 111).

Second, Fullan suggested that significant change could be accomplished by taking a developmental approach, pursuing multiple lines simultaneously. Third, he suggested concentrating efforts on working intensively with those schools and districts that were interested in the particular change effort.

It was important to recognize that if the obstacles to change in particular situations were ignored, the experience with implementation could be harmful to the adults and children directly involved--more harmful than if nothing had been done" (Fullan, 1991, p. 112).

Fullan ended his discourse planning, doing, and coping with change with this quote.

The main reason for failure is simple--developers or decision-makers went through a process of acquiring their meaning of the new curriculum. But when it was presented to teachers, there was no provision for allowing them to work out the meaning of the changes for themselves. Innovations that have been succeeding have been doing so because they combine good ideas with good implementation decision and support systems (Fullan, 1991, p. 112).

Understanding the orientations and working conditions of the main actors in schools and school systems is a prerequisite for planning and coping with educational change effectively (Fullan, 1991, p. 113).

The Superintendent and Change

Fullan (1991) described the task of the school district administrator as "to lead the development and execution of a system-wide approach that explicitly addresses and takes into account all these causes of change at the district, school, and classroom levels" (p. 191). Fullan suggested that the high turnover rate among superintendents was related to this complex task. However, he went on to suggest that some school district leaders did establish effective change processes, while others follow a disastrous pattern. Fullan argued that the district administrator was the single most important individual for setting the expectations and tone of the pattern of change within the local district.

Blumberg (1985) conducted a study of 25 superintendents who described their role as one of conflict and ambiguity mediated by everyday tasks. "It's always a balancing act because there are so many pressure groups" (Blumberg, 1985, p. 193). According to the

study, superintendents talked about politics, school boards, teacher unions, stress, public exposure, and conflict. Rarely did they discuss curriculum, instruction, and staff or professional development. Conflict resolution appeared to be the major task of the superintendents in the study according to Blumberg's conclusions. Cuban (1988b) conducted a similar study regarding superintendents and reached two conclusions: managerial and political roles, not the instructional role, dominated superintendents' behavior; and a minority of superintendents had used politics and management to elevate instructional leadership to a central district focus. In a study by Allison (1988), the superintendent's role was also characterized by a culture of "conflict, insecurity and uncertainty" (p. 5).

Fullan (1991) indicated that the average American superintendent's term was three years. In West Virginia, Martin and Zichefoose (1979) found that the superintendent "failure rate" (defined as superintendents who were fired, not rehired, or forced to resign) was 90 percent over a six-year period. Fullan noted that in these high turnover situations there were more occasions for reform but less continuity to actually bringing about reform.

According to Fullan (1991), the greatest problem facing leaders of school districts and schools was not resistance to innovation but the fragmentation, overload, and incoherence resulting from the uncritical and uncoordinated acceptance of too many innovations. Close scrutiny of innovation was essential but, once adopted, changes would not continue unless central staff

provided specific implementation pressure and support (Huberman & Miles, 1984).

Fullan (1991) suggested that effective district staff members who led multiple-school innovations did eight things. They tested out the need and priority of the change and determined the potential appropriateness of the particular innovation for addressing the need. Third, they clarified, supported, and insisted on the roles of the principal and other administrators as central to implementation. They also ensured that direct implementation support was provided in the form of available quality materials, in-service training, one-to-one technical help, and opportunity for peer interaction. Fifth, they allowed for certain redefinition, and adaptation of the innovation and communicated with and maintained the support of parents and the school board. They set up information-gathering systems to monitor and correct implementation problems. The eighth and final action of successful administrators was providing for a realistic time perspective. Fullan suggested that these factors did not happen by accident, but rather by an informed knowledge and a "feel" for the change process.

Another area identified as problematic for the district administrator involved in change was that of sustained improvement. Fullan noted the difficulties of effective innovation implementation through both centralization (standardization of curriculum) and decentralization (site-based management). Resistance and complexity vexed both issues. Levine and Eubanks' (1989) identified six obstacles to such empowerment assumptions:

inadequate time, training, and technical assistance; difficulties of stimulation consideration and adaptation of inconvenient changes; unresolved issues involving administrative leadership on the one hand and enhanced power among other participants on the other; constraints on teacher participation in decision-making; reluctance of administrators at all levels to give up traditional prerogatives; and restrictions imposed by school board, state, and federal regulations and by contracts and agreements with teacher organizations (Levine & Eubanks, 1989, pp. 4).

They suggested that most researchers on superintendents and change reported conclusions that appeared to be more neutral and disappointing than positive and encouraging. Levine and Eubanks (1989) issued a warning for three dangers regarding site-based management: the confusion between satisfaction and performance (changed instructional delivery and student performance were negligible while teacher satisfaction was improved); substitution of site-based management for central responsibilities regarding initiation and support of comprehensive school reform (responsibility for lack or failure of implementation shifted to the site level); and the confusion between site-based management and effective schools approaches (must retain instructional emphasis with additional input and refuse to throw out the baby with the bath water).

Fullan (1991, p. 203) raised the question, "What was school reform for?" He responded to his own question by suggesting that it should be directed towards the business of helping schools accomplish their educational goals more efficiently and effectively. This raised a question regarding the centralization issue. Fullan suggested that "the core problem was that education as it is now practiced did not engage students, teachers, parents, and

administrators" (Fullan, 1991, p. 203). Elmore (1988) identified three themes involved in the reform effort to address problems related to involvement and engagement.

An increasing proportion of hard-to-reach students, increasing attention to problems of engagement in teaching and learning, and increasing attention to problems of attracting and retaining educators with a serious interest in teaching and learning (Elmore, 1988, p. 11).

Using a study by Louis (1989), Fullan examined the relationship between school and district. Louis defined engagement as frequent interaction and communication, mutual coordination and influence, some shared goals, and defined bureaucratization as the presence of extensive rules and regulations governing the relationship. Four situations were drawn as a result of this study, the most significant of which was the scenario of high engagement and low bureaucracy which presented "the only clearly positive district contexts" (Louis, 1989, p. 161). This suggested that schools which operated with a district profile of co-management with coordination, joint planning, and consensus among staff members experienced successful school improvement projects.

LaRocque and Coleman (1989a) conducted a study regarding the analysis of "district ethos" and established six sets of activity and attitudes "focuses" which led to positive climates for change. The first was taking care of business, or a learning focus. The second was monitoring performance, an accountability focus. The third was changing policies and practices, a change focus. The fourth, was consideration and caring for stakeholders, a caring focus. The fifth was the creation of shared values, a commitment

focus. Sixth was the creation of community support, a community focus. From the study, it was concluded that effective districts had an "active and evolving accountability ethos that combined interactive monitoring with a respect for school autonomy" (LaRocque & Coleman, 1989a, p. 190).

Purkey and Smith (1985) suggested that "efforts to change schools have been productive and most enduring when directed toward influencing the entire school culture" (p. 357). They advocated change from a "top-down policy and bottom-up planning and implementation" (p. 364) mode to a balance "between an incentive-based and a mandated school change project as most workable" (p. 367). Effective superintendents continually negotiated and monitored the relationship with school staff, attempting to stay within an acceptable corridor of autonomy, accountability, variation and consistency while at the same time creating conditions that fostered the process of change.

In a study conducted by Hess (1989a), an assessment of various educational reform movements was done from the perspective of New York school superintendents. Out of the 70 surveys mailed, a 78.6 percent response rate was achieved. In comparing responses concerning reform movements, superintendents indicated that the highest possible impact was generated by focused approaches with limited populations, while the lowest positive impact was produced by open-ended approaches with less structure (Hess, 1989a, p. 10). Hess concluded that, while reform movements had some value, the real work of change in education lay in specific efforts to address

particular problems. Reform movements which addressed these characteristics received the highest marks from New York state superintendents (Hess, 1989a, pp. 10-12).

In another study of school reform, Ogletree (1985) surveyed over 100 school superintendents in Illinois. In his survey, he sought their opinions of reforms in specific areas. What he determined was that, overall, the majority of respondents supported the proposed reforms of the national reports. Specifically, school district administrators recognized curricular, organization, student staff problems, and the need for change in their respective districts. For example, they recognized the need for upgrading curricular offerings, teaching materials, and academic standards. Revised student policies and alternative programs were identified as means of providing a more manageable and conducive quality learning environment. The respondents also understood and sympathized with the increasingly difficult role of the teachers. Not only did most administrators recognize teachers' needs for recognition, professionalism, and autonomy but they were willing to share certain supervisory and administrative tasks, including teacher input into program development and text, material selection, and, to a slight degree, curriculum development, supervision, student policy responsibilities, and classroom autonomy regarding administrative disruptions. Ogletree suggested that his findings were an indication that district administrators were willing to assist in the initiation of reform and work with site staff to implement it. Areas of reform which were rejected or shown ambivalence were those

in fine art, foreign language programs, extended school year to 200 plus days, effectiveness of mainstreaming in elementary school districts, awarding of differentiated diplomas based on standardized tests, career-related courses for women and minorities, and the assumption of administrative responsibilities for curriculum, supervision, student policies, and control of administrative disruptions in the classroom by teachers. Ogletree made the argument that no state could fund reforms of these proportions without determining and finding the resources to pay for them.

In 1992, Wills and Peterson conducted a study of 30 school superintendents in Maine. The study was in response to the 1984 Maine School Reform Act which mandated statewide improvement plans. In the study on the external pressures for reform and strategy formation at the district level, they discovered what Fullan had suggested, that the diversity of interpretation (at both levels, state and local) of the reform effort was paramount to the actual implementation of the effort. Wills and Peterson suggested that, by ignoring superintendents' interpretations of any reform, policymakers removed the opportunity to assure that the state view of meaningful improvement was congruent with that held at the local level. The superintendents interviewed in the study viewed school improvement legislation as a useful lever for change in their districts. However, they argued that the top-down, bureaucratically driven, one-size-fits-all mentality for all schools ignores differing realities, and local political interests, as well as other, more manageable strategies that addressed the accomplishment

at the local level. Wills and Peterson summed up their study with the conclusion that, by providing fewer barriers to funding and by focusing more on outcomes, policymakers could reap more effective implementation from the diversity of superintendent actions.

Educational Reform in Oklahoma

This final section of Chapter II is used to develop an understanding of Oklahoma HB 1017, including its development and adoption and the reforms continued within the act. Before the significance of this bill can be understood, it may be necessary to provide a brief overview of national and state activity relative to educational reform since the late 1950s.

National Perspective

The relative satisfaction of the American people regarding their public education system was challenged by the Russian launching and subsequent orbiting of the Sputnik artificial satellite in October of 1957. In response to a perceived weakness in the public school curriculum, the United States Congress launched its own program to address the concern with passage of the National Defense Education Act (NDEA) in 1958. The late 1950s and early 1960s became known as the "Era of Curriculum Innovation" with NDEA having particular emphasis on the teaching of science, mathematics, and foreign languages (Passow, 1986).

In the late 1960s, innovations such as the open education approach of classrooms without walls, reductions in

compartmentalization of school environments, and the "new math" curriculum were encouraged by various provisions of the Elementary and Secondary Education Act of 1965 (ESEA) (Nyquist & Hawes, 1972).

In the 1970s, equal opportunity for all became the focus of educational reform. The development of curricula and programs for students with disabilities expanded rapidly after adoption of the Education for All Handicapped Children Act (P.L. 94-142) in 1975. Responsibility for the changes mandated by "94-142" quickly fell upon state agencies and local districts for implementation (Ravitch, 1983). Also in the 1970s, but reflecting a different category of students, special programs began to address the needs of the gifted and talented (Hess, 1989b). By the mid 1970s, the federal government had become involved in both the funding of and control over 66 categorical programs dealing with everything from science and math curricula to parental choice. Mann (1978) noted that, as quickly as one program would exit, another would enter to take its place.

The effective schools movement made its appearance in the 1980s, focusing on the development of academic emphasis, skills of teachers, instructional behaviors, rewards and punishments, student climate, student responsibility and participation, and staff responsibility and participation (Steller, 1988).

The 1980s, especially after the 1983 introduction of the National Commission on Excellence in Education report, "A Nation at Risk", became known as the decade of the "Great Reform Movement" (Griesemer & Butler, 1983). The period was symbolized by an

increase in regulatory standards and graduation requirements as a means of increasing the quality and the rigor of education in the schools. Not only did the authors of "A Nation at Risk" suggest that the nation's well-being was threatened by its mediocre educational program, they listed the following as specifics in support of that allegation: poor achievement test scores; declines in both enrollment and achievement in science and mathematics courses; the high costs to business and military for providing remedial and training programs; unacceptable levels of functional illiteracy found among American children and adults; and poor performance of America's students on comparative studies of educational achievement (National Commission on Excellence in Education, 1983).

Between 1982 and 1984, a "who's who" list of authors churned out additional school reform documents. According to Lauer (1991), examples of these included Ernest Boyer's High School (1983); John Goodlad's A Place Called School (1984); Meeting the Need for Quality (Southern Region Education Board, 1983); Theodore Sizer's Horace's Compromise (1984); Mortimer Adler's The Paideia Proposal (1982); and Paul Peterson's Making the Grade (1983). In 1985, Blumberg questioned the "true" changes that all of the proponents of the reform efforts were claiming. He argued that "the system seems to have remained relatively stable in the face of tremendous effort to make it different" (Blumberg, 1985, pp. 30-31).

Oklahoma Reform Since 1980

Governments at the state level, not unlike that at the federal level, became heavily involved in the educational reform movement, especially since the early 1980s. Such reforms in Oklahoma began in 1980 with the passage of HB 1706. The major provisions of the bill addressed teacher preparation, providing for field-based experience and competency testing; teacher assistance, with teacher consultants for every first year teacher; and staff development, requiring all certified staff to attend 75 hours of inservice education over a five-year period. In a related effort to provide for curriculum alignment, the Oklahoma State Department of Education required that each school district adopt a "Curriculum Review Model" composed of five main topics: course philosophy, suggested learner outcomes, program evaluation, scope and sequence. Related guides for each subject were to be prepared by the state agency and local plans were to be reviewed annually (Oklahoma State Department of Education, 1989).

In an effort to provide for equitable distribution of state funds for schools, a revision of the funding formulas was enacted by the Oklahoma Legislature in 1981. Adjustments were made in the grade level weighting of students for funding as well as the special needs weighting. Because of the resulting reduction in funds for some districts, a "hold harmless" clause was initiated to provide a "floor" for the transition to the new formula (Deering, Shive, Bass, & Pettigrew, 1989). Following the lead of the federal initiative some years earlier, the legislation provided additional formula

funding for gifted/talented students, those identified in the top three percent on a nationally standardized test. School districts had until the 1983-1984 school year to establish gifted and talented programs.

Reacting to national concerns regarding poor test scores, the Oklahoma Legislature in 1983 created a full-time residential math/science program for selected juniors and seniors. The school, which was not fully operational until the fall of 1990, was also required to provide regional summer institutes as well as other in-service programs for state teachers (Lauerman, 1991). In the 1990 legislative session, a supplemental appropriation of \$800,000 was approved to allow the school to begin architectural and engineering work for its Oklahoma City campus (Oklahoma State School Boards Association, 1990).

In 1985, the Oklahoma legislature adopted the Education Improvement Act (SB 183). What had begun in 1986 with mandated norm-referenced testing for grades students in grades 3, 7, and 10 was to be expanded to include those in grades 3, 5, 7, 9 and 11. Writing assessments for students in grades 7 and 10 were to be added as mandates in 1987 and 1988. In 1989, future graduating seniors of the class of 1993 were informed that they would be the first students required to pass a criterion-referenced test before receiving a high school diploma. Failure to pass the test after repeated attempts and remediation would result in a certificate of

completion in lieu of a diploma (Oklahoma State Department of Education, 1989).

Kindergarten readiness was addressed in legislation enacted in 1985 with provisions that, by 1986, all schools would provide a screening for children prior to or during the kindergarten year. Assistance in implementation was to be provided by the Regional Education Service Centers (Lauerman, 1991). The Education Improvement Act of 1985 also initiated another reform process for primary grade class size reductions. However, financial constraints led to a moratorium on implementation, a new bill, a governor's veto of the new bill, and, finally, passage of HB 1202 which provided for financial penalties against districts for any kindergarten class found to have more than 20 students by 1993-1994 (Oklahoma State School Boards Association, 1985). Aligning itself with the national effective schools movement, the Oklahoma State Department of Education developed a guide for and trained all Oklahoma school administrators in the evaluation of teachers according to effective teaching criteria (Oklahoma State Department of Education, 1985).

Beginning in 1986, schools were required to write a four-year district improvement plan which incorporated procedures for teacher evaluation and recommendations for remediation of low skill areas. The plan also required an annual review and update.

Beginning in 1987, local school district voters were permitted to by-pass the school board resolution process by directly petitioning for a school district annexation. In another effort to reduce the number of school districts in Oklahoma, SB 74 (1989)

provided financial incentives for any school district whose voters and school boards voluntarily decided to engage in consolidation or annexation (Lauerman, 1991).

Concerned with a new health threat, HB 1476 was passed in the Oklahoma Legislature in April of 1987. It mandated that AIDS prevention education be taught in the public schools beginning with the 1987-1988 school year. The law mandated that the program address students at least once in grades 7 through 9 and once in grades 10 through 12. Addressing another health issue, HB 1344 was also passed in 1987. This act provided for the development of drug and alcohol abuse prevention curriculums and, at the same time, encouraged application for and participation in the federal "Drug Free Schools and Communities" program.

With the passage of SB 183 in 1988, certain school district performance indicators such as achievement test scores, dropout rates, average class sizes, and post-secondary education and employment of graduates were mixed with school district financial and socioeconomic data to predict and compare school outcomes. School districts falling in the bottom quartile of the indicators program were to be considered "academically at risk" and targeted by the State Board of Education for improvement or possible closure.

House Bill 1017

Notwithstanding the many educational innovations already introduced in Oklahoma in the 1980s, the national climate for wholistic educational change continued to have an impact on the

state's elected officials. On July 11, 1989, then-Governor Henry Bellman issued an order to convene a special session of the state legislature to consider educational reforms and associated increased funding for schools (Killackey & Hinton, 1991).

What followed provided an example of change as it relates to the multiple realities of those who experience it (Fullan, 1991). Issues of need, direction, funding, and speed of implementation rose quickly to the forefront. These issues were addressed in a series of activities that can be best be understood by the following timeline.

- August, 14, 1989 - Special session convenes
- August, 29, 1989 - Bellmon and legislative leaders appoint Task Force 2000, an organization formed to make recommendations for improving common education in Oklahoma.
- November 6, 1989 - Task Force 2000, chaired by Tulsa businessman George Singer, issues Task Force 2000 report. Much of this report is eventually included in HB 1017, the school reform and tax act.
- January 31, 1990 - The final version of HB 1017 passes the House of Representatives. The emergency clause, which would make the bill effective immediately when signed into law by the governor, fails.
- February 13, 1990 - The House passes the emergency clause on HB 1017 and sends the measure to the Senate.
- February 13, 1990 - The Senate passes HB 1017, then lodges a motion to reconsider the vote, obviously because Senate leaders don't have enough votes to pass the emergency clause.
- April 11, 1990 - The Senate votes on but fails to approve the emergency clause.
- April 12, 1990 - Senate leader Bob Cullison lodges a motion to reconsider the emergency clause.
- April 12, 1990 - Oklahoma Education Association President, Kyle Dahlem calls for a statewide teacher walkout and rally at the state capitol.
- April 16, 1990 - Thousands of teachers converge on the capitol.
- April 19, 1990 - Senate passes HB 1017, with the emergency clause.

- April 25, 1990 - Governor Henry Bellmon signs the bill into law.
- May 25, 1990 - STOP New Taxes, an organization headed by Dan Brown, files a notice of intent to distribute an initiative petition to place the "education reform and tax increase" bill on a statewide ballot.
- July 16, 1990 - After obtaining 150,000 signatures, STOP New Taxes files its petitions with the Secretary of State
- August 8, 1990 - Secretary of State Hannah Atkins certifies that the petitions contain enough signatures and sends them to the Oklahoma Supreme Court (Killackey & Hinton, 1991).

Dan Brown and the STOP New Taxes organization, which was established to support a vote to repeal HB 1017, met some opposition when "Growth Oklahoma" ("GO") was established. Headed by Tulsan Terry Almon, the mission of "GO" was the preservation of HB 1017. To accomplish that mission, the organization concentrated on a statewide campaign to "get out" voter support for education (Kurt, 1991).

With STOP and GO providing both the funding and the focus of a media blitz, battle lines formed quickly. State newspapers were quick to side with one group or the other. In a June 16, 1991 editorial, the Daily Oklahoman suggested that "the tax hogs had their way for a year. That's long enough" ("Back to," 1991, p. 16). The Tulsa World in its editorial on September 29, 1991, suggested that "repeal will be an admission that Oklahoma doesn't care about schools. We will be saying, plainly, we are satisfied to be at the rear end of the nation in education" ("1017: historic," 1991, p. D-8). Another major state newspaper, the Tulsa Tribune, also came out in support of HB 1017. In an editorial on September 16, 1991, its editors stated that voters "could turn the clock back to

the summer of 1989 when our public schools wallowed in mediocrity, with little hope for relief. We must say no to such a bleak prospect" ("A high-stakes," 1991, p. E-1).

In October of 1991, State Question 639 regarding the repeal of HB 1017 went to a vote of the people and was defeated. House Bill 1017 thus became perceived as a mandate of the people as well as of the legislature. The defeat of State Question 639 eliminated any concerns over implementing the components of a major education bill which could be repealed. The Oklahoma State Department of Education and Oklahoma school districts were faced with the task of putting into practice what had, to that point, been in writing only.

While the relative individual significance of the 22 major topics addressed in HB 1017 went unquestioned, selected reforms have been identified for the purposes of this paper. The process by which these reforms were selected is detailed in the next chapter. A complete summary of HB 1017 reforms prepared by Oklahoma House of Representatives staff may be found in the Appendix.

One major component of HB 1017 to be addressed in this study is accreditation. This area of the law required the State Board of Education to adopt new school accreditation standards that would meet or exceed North Central accreditation standards, with an outcome-oriented approach, provided that the standards did not conflict with other state statutes. The law also included a mandate for the provision of school counselors (Joint Conference Committee, 1990). The accreditation component was later divided, for implementation purposes, into 12 standards: philosophy (and/or

mission) and goals; school-community relationships; administration and organization; curriculum and instruction; the school staff; student services; the media program; student activities program; financial support; school facilities; accreditation status; and deregulation rules and procedures (Oklahoma State Board Association, 1994). School district administrators were informed that their districts would not lose or be denied accreditation solely for failure to meet the standards until the 1997-1998 school term.

Another HB 1017 component addressed curriculum with the establishment of a 22-member Oklahoma Curriculum Committee. The responsibility of the group was to develop a new statewide core curriculum based on specific learner outcomes. These outcomes were to be written into statements of particular skills and knowledge to be mastered by students (Joint Staff Information Sheet, 1991, No. 19). The curriculum component identified specific areas to be addressed: opportunities for student proficiency in computer technology; multi-cultural study in the core curriculum areas of social science, literature, languages, arts, math, and science; career exploration in grades 6-10; and graduation attainment based upon levels of competency rather than course credits earned (Joint Conference Committee, 1990).

Consolidation and annexation were initially supported by a \$35 million incentive allocation. HB 1017 provided that a school district acquiring another entire district by consolidation or

voluntary annexation would be eligible for the supplemental financial assistance (Joint Staff Information Sheet, 1991, No. 7). Funding from the School Consolidation Assistance Fund would allowed school personnel who lost employment due to annexation or consolidation to be paid up to 80% of annual salary, excluding fringe benefits, in the form of a severance pay and receive a year of service credit for retirement calculations. Further, a three-year moratorium on school site closings for consolidated districts was offered as an additional incentive. Financial incentives for multiple district consolidations were offered based upon average daily membership and the number of districts to consolidate (Joint Conference Committee, 1990).

Beginning with the 1991-92 school year, with the exception of children screened and determined not to be ready, one-half day kindergarten was required for all children who were five years old as of September 1. The kindergarten and early childhood education portion of HB 1017 also provided that teachers of either area who are employed after January 1, 1993, must be certified in early childhood education. It went even further to state that by the 1996-1997 school year, all teachers teaching in these areas but holding "K-8 or K-12" certification, regardless of their original employment date, must obtain early childhood certification (Joint Staff Information Sheet, 1991, No. 20). Kindergarten/early childhood portions of the bill also authorized the Oklahoma State Department of Education to develop a four-year-old early childhood program that schools may offer using developmentally appropriate objectives.

Children who met qualifications for Head Start were to be given priority in such placement (Joint Conference Committee, 1990).

Class size reduction was a significant element in HB 1017 and provisions of the law provided for the amendment of all previous class size reduction statutes to treat class size more comprehensively. It changed the student count for determining class size from average daily attendance to average daily membership with calculations for the determination of class size to be reached by dividing average daily membership by the full-time equivalency of instructional staff assigned at each grade level by site (Joint Staff Information Sheet, 1991, No. 17).

The reduction in class size is represented by class and by years in the following information.

Year	Kindergarten	Grades 1-3	Grades 4-6	Grades 7-12
1989-90	25	22	25	*140 or <
1990-91	24	21	23	*140 or <
1991-92	23	20	22	*140 or <
1992-93	22	20	21	*140 or <
1993-94	20	20	20	*140 or <
1997-98	20	20	20	*120 or <

* per six hour day (Joint Conference Committee, 1990, p. 5A).

The teacher salaries and incentive pay portion of HB 1017 consumed the bulk of the generated revenue required to accommodate the mandates. Salaries on a 15-step scale reflected \$17,000 for the beginning teacher with a bachelors degree in 1990-1991. That same salary step in 1994-1995 was scheduled to be \$24,060, a \$9,000

increase. The HB 1017 salary schedules were designed to provide minimum level raises of similar proportions up and down the 15-step scale (Joint Staff Information Sheets, 1991, No. 12). This component of the bill also mandated that "teachers' salaries should not be calculated solely as a proportion of administrators' pay in the school district" (Joint Conference Committee, 1990, p. 7). It also required districts beginning with the 1990-1991 school year to "allow public inspection of school superintendents' contracts at the State Department of Education" (Joint Conference Committee, 1990, p. 7).

As a part of the incentive pay portion of the bill, districts were given the option of providing incentive pay plans with a 20% ceiling on teacher salary increases in a given year. Teachers could also use a petition signed by at least 25% of the district's classroom teachers to require the implementation of such a plan. "Pupil test scores were not to be used as the sole criteria for determination of incentive pay" (Joint Conference Committee, 1990, p. 7).

Teacher and other school personnel due process rights were also addressed by the passage of HB 1017 which changed the grounds for dismissal or nonreemployment and the hearing and appeal procedures. New additional grounds for dismissal included instructional ineffectiveness, mental or physical abuse to a child; repeated negligence in performance of duty, instructional ineffectiveness, and unsatisfactory teaching performance. Additionally, the law changed the designation for post-probationary teachers from

"tenured" to "career" and did away with the provision whereby a district hiring a tenured teacher from another district could grant tenure after only one year. A termination decision is to be made by a vote of the local school board in open meeting following a pretermination hearing. If the decision is to dismiss or non-reemploy a career teacher, the board must advise the career teacher of the right to petition for "trial de novo" in the district court within ten days after receipt of notice. The board's decision regarding a probationary teacher is final. In the post-termination process for career teachers, provided that the teacher petitions the district court for trial de novo, the district court conducts an entire non-jury civil trial as a "new thing" -- as if the pre-termination hearing had not been held. The burden of proof is on the superintendent of the district (or designee) and the standard of proof is the preponderance of the evidence. The court has the option to either reinstate the career teacher or to sustain the decision of the local board. It also has the right to enter an order regarding attorneys' fees and costs. The decision of the court is final unless appealed to a higher court (Joint Staff Information Sheets, 1991, No. 14).

The state aid formula was also addressed in HB 1017. While said not to be "materially" altered, changes made in the formula weights had a direct and sometimes dramatic impact on the amount of funding received by individual school districts (Joint Staff Information Sheets, 1991, No. 5). Application of the special education student weights was extended to both foundation aid

and the incentive aid formulas where previously they had only been used in calculating foundation aid. Application of the economically disadvantaged student weighting which had previously only applied to incentive aid was also extended to both funding formulas. A grade level weight was added for early childhood programs for eligible children not paying tuition as was a new weight for an optional extended school year. In addition to the existing small school weighting, a geographical isolation factor was isolated factor was added to the formulas, with the provision that funding would be calculated for small schools by the factor that provided the most money. The use of average daily membership as the student count was extended to the foundation aid formula. Previously average daily membership was used only for incentive aid and average daily attendance had been used for foundation aid. Finally, beginning in the 1992-1993 school year, HB 1017 provided for a penalty to be applied against state aid for an excessive general fund carryover by school districts (Joint Conference Committee, 1990).

House Bill 1017 provided increased funding for its sponsorship from several areas. It increased the state sales and use tax rate from four percent to four and one-half percent. It increased the corporate income tax and bank tax rate from five percent to six percent. Finally, it adjusted the brackets within the individual income tax rates to result in an approximately ten percent increase in collections. Common education, for the first time ever, was funded above the one-billion-dollar level (Oklahoma State School Boards Association, 1990). While HB 1017 provided somewhat of a

climax to a decade filled with change, it did not slow the introduction of bills by the Oklahoma State Legislature that ultimately impact common education. Thirty-nine bills or joint resolutions were passed in addition to the omnibus 1017 Bill (Oklahoma State School Boards Association, 1990, pp. 9-14).

In the 1991 Legislative Session, 47 education related bills were passed. Of the significant bills included one regarding alternative teaching certification. It basically allowed an individual to teach up to 90 hours per semester in any subject area without certification. Further, HB 1276 limited the number of Oklahoma School of Science and math enrollment to 150 students. Additionally, it authorized \$6 million in negotiable bonds for the purpose of operating and maintaining buildings for use by the school (Oklahoma State School Boards Association, 1991. pp. 5, 11).

The 1992 Legislative Session was marked by the approval of State Question 640 which requires all revenue measures passed by the Legislature to go to a vote of the people, unless the legislature gives at least a 75% vote of approval for the measure. It did not slow the passage of bills effecting education as 67 pieces of legislation were passed by either the Oklahoma House or Senate. Senate Bill 958 removed the language requiring a graduation test for all 12th grade students; put into place a series of criterion-referenced tests for grades 5, 8, and 11 in several subject areas, beginning with math and science, with the first tests to be field-tested in 1993-1994 and implemented in 1994-1995; provided that school district make available opportunities for remedial work for

those students who have not performed satisfactorily and a retake of the test in the following year. Outcomes-based education became a required part of state-mandated staff development programs for teachers with the passage of SB 963. House Bill 2246 called for the creation of a new teacher preparation system to be established within three years and created the 28-member Oklahoma Commission for Teacher Preparation Task Force to guide that process until July 1, 1998. The preparation of school principals was an additional component of HB 2246 (Oklahoma State School Boards Association, 1992). Legislative commitment to education was evident in the 1993 legislative session. With a revenue state shortfalls all and state agency budget cuts, a significant revenue increase for common education was made. One of the agency decreases, however, came at the State Department of Education where \$3,452,096 or 18.8% of the budget was slashed. Additionally, competitive state grants were eliminated or severely reduced, representing a \$4,779,511 or 10.6% reduction (Oklahoma State School Boards Association, 1993). Senate Bill 500 provided for the creation of a 13-member Oklahoma Youth Apprenticeship Committee to provide methods of helping secondary students make a smooth transition from high school to the workplace. House Bill 1298 moved the selection of textbooks from a five-year to six-year cycle and changed the definition of textbook to include instructional materials that are designed for use by pupils as a learning resource. This change in definition provided for items such as computer software to be added to the list of materials that could be purchased with state textbook funds. House Concurrent

Resolution 1015 directed school districts, upon new construction or major innovation of facilities to investigate and consider inclusion of wiring and equipment for distance learning (Oklahoma State School Boards Association, 1993).

The 1994 legislative session mandated the end of the five-year teacher salary plan initiated with HB 1017. Due to the equalizing effects on the school funding formulas, one fourth of the 551 school districts in the state had received less state aid than in the previous year. Local increases in wealth, decreases in student populations, and shifts in the weighted formula applications at the local level were suggested to have caused such a reduction (Oklahoma State School Boards Association, 1994). Unfunded mandates received attention in 1994 when a resolution was approved and sent to Congress requesting endorsement and support on behalf of the efforts of numerous federal, state, and local government entities to inform citizens about the impact of unfunded federal mandates. This message is one that has permeated educational debates on the state level for many years and promises to become an even larger issue in the future as funding levels and mandates increase (Oklahoma State School Boards Association, 1994). In keeping with special needs legislation generated in the 1980s and increased with the passage of the Americans with Disabilities Act (ADA), HB 1874 required textbook publishers who contract with the State Textbook Commission to furnish computer diskettes for translating textbooks to Braille (Oklahoma State School Boards Association, 1994).

In the field of education, the past several decades may have been the best of times, and the worst of times. Because of the intense public interest generated by events such as Sputnik, the shift to special needs children, and, finally, "The Nation at Risk," education has been at the forefront of governmental activity. Increased funding by both federal and state governments, has resulted from this attention. This extreme interest and involvement may however have exacted a price for the teacher, the administrator, and the local school board. With the funding, also came the greater attention to public education of policymakers, particularly the increase in mandates, regulations, and oversight.

Fullan (1991) suggested that many of the changes could be considered merely as "non-events" (p. xiii). While creating havoc in the education workplace, many of the reforms may be played out only to result in what Fullan referred to as "near change."

The arguments for and against change and innovation will ultimately come down to several questions. What change or innovation is good, worthwhile, and a betterment to children in the process of education? How can the individual realities and institutional goals (determined good for children and the process of education) best be melded into implementation? Fullan suggested that there is no one recipe for change but, rather, change is a process not an event. The district superintendent must be knowledgeable in the change process to effectively assist in the implementation of second-order change. It is the task of the district administrator to scrutinize innovations and to build the

capacity of the district and the schools to handle any and all of them, a task that requires great sophistication on the part of the school leader.

CHAPTER III

RESEARCH DESIGN

As was stated in the problem statement found in Chapter I, many believed that the legislative adoption of House Bill 1017 in 1990 would lead to major changes in the way public schools operate in Oklahoma. Now, some question whether these changes have actually occurred and, if so, to what extent they should be perceived as truly structural or merely cosmetic change.

The purpose of this study was to identify the perceptions of superintendents in Oklahoma regarding the major changes resulting from HB 1017. The first element of the study involved the identification of those reforms linked to HB 1017 that superintendents perceived to have had the greatest impact on public education in Oklahoma. Those were then compared to the reforms superintendents had predicted to have the greatest impact, according to an earlier study done by Lauerman (1991). The second portion of this study then was designed to collect data regarding the perceptions of superintendents as to the degree and nature of change effected by each of those reforms. The following research questions guided the analysis of the data.

1. How do superintendents assess the impact and effectiveness of change and reform? How has that assessment changes since 1990?

2. To what degree do school superintendents support or oppose the reform efforts in Oklahoma? How has that perception changed since 1990?

3. Does the regional location, school district size, or superintendent's age, gender, or amount of experience affect the manner in which a superintendent perceives education change and reform?

This chapter contains a review of the research design for this study. Included are segments describing population and sample, instrumentation, data collection, and data analysis.

Population and Sample

Using a table of random units (Weast, 1970), three-digit numbers ranging from 001 to 433 were assigned to each of the 433 independent school district superintendents in Oklahoma, using an official listing of the names, addresses, and telephone numbers of each superintendent secured from the Oklahoma State Department of Education Data Processing/Research Services Division. From that list 108 individuals (25%) were randomly identified and selected to constitute the sample for the study. Independent school districts in Oklahoma are defined as those districts providing educational programs for grades kindergarten through twelve.

Instrumentation

The development of a survey instrument for this study began with the questionnaire used by Lauerma (1991) in her doctoral

research at Oklahoma State University. The six major reform measures of HB 1017 identified by Lauerman were the result of interviews with representatives of Task Force 2000, the Cooperative Council for Oklahoma School Administration, and the Oklahoma State School Boards Association. Lauerman then surveyed Oklahoma superintendents in 1990 to assess their perception of those provisions. The changes which were used in the Lauerman study were voluntary consolidation of schools, career teacher and tenure process, master salary schedules for teachers, accreditation standards, the common school fund, and Oklahoma Curriculum Committee standards. These then constituted the pre-implementation changes.

Since the implementation process and subsequent legislative actions may have resulted in changes in the specific reforms which superintendents might perceive as having had the greatest impact, an effort was made to identify "post-implementation" reforms with such impact. On December 8, 1994, at the executive committee meeting of the Oklahoma Association of School Administrators, a two-round, modified Delphi technique was initiated to determine which HB 1017 changes were perceived to have had the biggest impact on Oklahoma public education. The data from this process were processed to eliminate duplication among responses and then rank-ordered from greatest to least perceived impact and resubmitted to the same group for a second response on January 5, 1995. Each respondent was then asked to indicate whether the reform identified was viewed as not significant, somewhat significant, or greatly significant. Results from the Delphi process yielded six major areas of change from HB

1017 in addition to those identified in the Lauerman study. They were class size reduction, technology, achievement scores, facility needs, community involvement, and elementary foreign language requirements.

A total of 12 reforms, six from the Lauerman study and six from the current study, thus had been identified by public school superintendents as HB 1017 changes which have had the greatest impact on Oklahoma education. These 12 topics were then used as the basis for development of a questionnaire to collect the data for this study.

A list of seven questions was developed for each of the 12 identified reforms. In questions one through four, the superintendents were asked to rate their responses using a five-point Likert-type scale. The first two questions were focused on the perceived impact of each reform, from a statewide perspective and on the local district. Options for responses to questions one and two included very positive (+2), somewhat positive (+1), no impact (0), somewhat negative (-1), and very negative (-2). The third question was used to solicit data regarding each subject's position relative to each reform. Question three response options were very supportive (+2), somewhat supportive, neutral, somewhat opposed, to very opposed (-2). Question four was designed to identify changes in position in regard to reform measures in HB 1017 with available responses of much more supportive now (+2), somewhat more supportive now, no change, somewhat more opposed now, and much more opposed now (-2). Item six was related to Fullan's change theory and requested

a response from the following choices: adopted but not implemented (-2), initially implemented but abandoned (-1), implemented but without structural/real change (+1), or implemented resulting in structural/real change (+2).

Survey items five and seven were written to allow for open-ended, narrative responses from the subjects. Item five provided an opportunity for respondents to explain why their support or opposition had changed regarding each identified reform since the adoption of HB 1017. Item seven allowed for additional narrative response to any of the reform issues.

Distribution of the questionnaire to subject superintendents was preceded by a pilot study with a five-member panel of public school administrators. Additionally, selected Oklahoma State University faculty in educational administration were asked to review and provide recommendations for changes regarding the content and/or format of the instrument. After these reviews, the instrument was revised and distributed to seven additional administrators not selected for the random sample. Both written and verbal critiques were solicited, revisions made, and the final instrument was prepared for distribution.

Data Collection

The survey instrument (See Appendix B) provided the vehicle for data collection. Confidentiality was assured throughout the data collection process. In order to ascertain the greatest number of responses to the survey and yet provide anonymity, a postcard

identifying each subject superintendent and school district accompanied the information packet (See Appendix C). Upon completion and mailing of the survey document, each superintendent was asked to mail this card independent of the survey information. This procedure allowed for an identification of non-respondents for follow-up activities to encourage participation.

Included in the information packet were a letter of introduction, instructions, the questionnaire, a stamped return envelope, and the stamped return postcard indicating completion and mailing of the survey (See Appendix C). This packet was mailed to each of the 108 Oklahoma independent school district superintendents identified through the random sample process. Twenty-one days following the initial mailing, a follow-up postcard (See Appendix C) was mailed to non-respondents. After a total of 35 days, contacts were made via the telephone encouraging return of the completed instrument. A total of 73 responses were obtained for a return rate of 68 percent.

Analysis of the Data

Data from the returned questionnaires were reported through descriptive statistics using percentage distribution and measures of central tendency. Analysis of the relationships among the variables categorized by demographics, by perceptions, and by reform topics were accomplished with the use of the Pearson Correlation Matrix. Narrative derived from items 5 and 7 of the questionnaire was

summarized for inclusion in Chapter IV. The full text of those responses has been attached to the dissertation (See Appendix D).

Summary

In summary, the purpose of this study was to identify the perceptions of superintendents in Oklahoma regarding major changes resulting from HB 1017. As was indicated, six reform measures were those used in the Lauerman study and six were derived from superintendents' 1994-95 responses to a two-round, modified Delphi process.

A survey instrument was developed and a pilot study conducted among administrators not selected to be in the sample to assess reliability and validity and to form a basis for any adjustments or changes necessary in the content and/or format of the form.

A sample of 108 superintendents from the 433 independent school districts in Oklahoma was randomly selected to participate in the study. Of these, 73 returned questionnaires.

Data obtained from the questionnaire were reported through measures of central tendency. The Pearson Correlation Matrix was used to analyze the relationship among specific variables, and comparisons were made between support variables and demographic variables to determine whether or not a significant relationship existed among the possible comparisons.

CHAPTER IV

PRESENTATION AND INTERPRETATION OF DATA

The literature would suggest that true change is difficult to accomplish. Many believed that the legislative adoption of House Bill 1017 in 1990 would lead to major changes in the way public schools operate in Oklahoma. Whether changes have actually occurred or have merely been addressed cosmetically varies from district to district and superintendent to superintendent. Variations among the 433 Oklahoma independent school districts exacerbate the differences in impact of reform issues, in large part regarding perceptions as to what is collectively best for each district.

The purpose of this study was to identify, five years after its adoption, the perceptions of superintendents in Oklahoma regarding the major reforms contained in HB 1017. The sample consisted of 108 superintendents randomly selected from the population of 433 superintendents of Oklahoma independent school districts in 1994-95. A total of 73 superintendents, or 68% of those surveyed, completed and returned the instrument which furnished the data for this study, the analysis of which is reported in this chapter.

Demographics

The first part of the survey instrument was designed to collect demographic information from the sample. Data requested in Part I included average daily membership (ADM) and regional location of the school district as well as the superintendent's age, gender, and years of experience. The data were analyzed and reported for all respondents and were compared with data for the total population where such data were available.

Table I indicates that the distribution of respondents according to district size, as determined by average daily membership (ADM) was similar to that for the population, with the majority of school districts represented by both groups reporting a per-district ADM of 3,000 or less. Where the largest group of respondents (32.9%) were from school districts between 251 and 500 ADM, that size also constituted the largest group of school districts in the total population.

The three largest categories of school districts were represented by only five (6.8%) of the superintendents who had responded to the survey. However, those three categories represented only 6.9% of all independent school districts in the state. Population figures were derived through the Oklahoma State Department of Education and reflect a total of 433 districts, 14 less in 1995 than the number identified in the 1991 Lauerman study.

The distribution of the respondents and total number of school districts by region is shown in Table II. The districts

TABLE I
DISTRIBUTION OF OKLAHOMA INDEPENDENT SCHOOL DISTRICT
SUPERINTENDENTS, BY SIZE (ADM)

District Size	Respondents		Population*	
	N	%	N	%
0 - 250	11	15.1	76	17.6
251 - 500	24	32.9	142	32.8
501 - 1,000	17	23.3	95	21.9
1,001 - 3,000	16	21.9	90	21.8
3,001 - 5,000	0	0	10	2.3
5,001 - 10,000	3	4.1	10	2.3
- 10,000+	2	2.7	10	2.3
Totals	73	100.0	433	100.0

*Oklahoma State Department of Education, 1995.

TABLE II
DISTRIBUTION OF OKLAHOMA INDEPENDENT SCHOOL DISTRICT
SUPERINTENDENTS, BY REGION

Quadrant	Respondents		Population*	
	N	%	N	%
Northwest	16	21.9	85	19.6
Northeast	25	34.2	139	32.1
Southwest	14	19.2	85	19.6
Southeast	18	24.7	124	28.7
Totals	73	100.0	433	100.0

*Oklahoma State Department of Education, 1995.

were divided into quadrants within the State of Oklahoma by Interstate Highway 35 (north to south) and Interstate Highway 40 (west to east). The number of respondents from each quadrant indicates a fairly representative distribution in comparison with the population. The Northern regions of the state had slightly larger proportions of the respondents while the Southeast region had lower representation among the respondents.

Table III shows the frequency and percentage distribution by gender of both respondents and the population of Oklahoma independent school superintendents.

While it is obvious that only a small proportion of Oklahoma superintendents are female, the number of female superintendents has risen from 13 (2.9%) in the 1991 Lauerma study to 22 (5.1%) in this study. Of the 4 females selected in the random sample, only two responded to the 1995 survey instrument, making it impossible to develop a meaningful analysis of data by gender of the respondent.

Table IV provides a view of the distribution of ages of those who responded to the 1995 survey. In comparing the information with that obtained during the Lauerma study of 1989, the number of respondents in the 31-40 age group was less, while numbers for the 41-50, 51-60, and over 60 groups were greater.

Data regarding the respondents' years of experience as superintendent are presented in Table V. The greatest percentage of respondents was for those with over 15 years of experience (34.2%), followed by those with 8 to 11 years of experience (26.0%). Almost

TABLE III
DISTRIBUTION OF OKLAHOMA INDEPENDENT DISTRICT
SUPERINTENDENTS, BY GENDER

Gender	Respondents		Population*	
	N	%	N	%
Female	2	2.7	22	5.1
Male	70	95.9	411	94.9
No Response	1	1.4	0	0
Totals	<u>73</u>	<u>100.0</u>	<u>433</u>	<u>100.0</u>

*Oklahoma State Department of Education, 1995

TABLE IV
DISTRIBUTION OF RESPONDENT SUPERINTENDENTS BY AGE

Age Group	Respondents			
	Current Study		Lauerman Study	
	N	%	N	%
Under 31	0	0.0	0	0.0
31 - 40	4	5.5	15	17.2
41 - 50	45	61.6	46	52.9
51 - 60	21	28.8	24	27.6
Over 60	3	4.1	2	2.3
Totals	<u>73</u>	<u>100.0</u>	<u>87</u>	<u>100.0</u>

Note: Comparable data were not available for the population

TABLE V
 DISTRIBUTION OF RESPONDENT SUPERINTENDENTS
 BY YEARS OF EXPERIENCE

Years of Experience as Superintendent	N	Respondents %
0 - 3	12	16.4
4 - 7	8	11.0
6 - 11	19	26.0
12 - 15	9	12.3
Over 15	25	34.2
Totals	<u>73</u>	<u>100.0</u>

Note: Comparable data were not available for the population.

half of the respondents had 12 or more years of experience as superintendent.

From the demographic data, the typical Oklahoma superintendent, both in the respondent group and in the population, is a male, over the age of 40, with considerable experience in that position. The respondent superintendent would serve a small school district, more likely in the eastern part of the state.

Reform Issues

Part II of the survey instrument included questions aimed at revealing Oklahoma superintendents' perceptions of education reforms associated with HB 1017. The survey segment was divided according to 12 different reform issues. The first six were those identified by the 1990 Lauerman study. Six additional issues were identified by independent school district superintendents in Oklahoma as HB 1017 issues considered to be significant in 1995. The 12 reform issues thus identified are: (1) voluntary annexation or consolidation, (2) career teacher/tenure, (3) minimum salary schedule, (4) accreditation standards, (5) common school fund, (6) Oklahoma Curriculum Committee, (7) class size reduction, (8) technology, (9) achievement scores, (10) facility needs, (11) community involvement, (12) and elementary foreign language.

Voluntary Annexation or Consolidation

HB 1017 established a School Consolidation Assistance Fund to provide financial assistance to small school districts which

consolidated or annexed to larger districts. Under the provisions, school districts would receive funds (up to 80% of the total annual salary expenditures) to help pay for assistance to school personnel who lost employment due to annexation or consolidation. Persons receiving such severance pay would also be credited with one year of additional service for retirement purposes.

The school consolidation provisions also gave district voters the right to petition for a school consolidation vote even if the local board of education did not consent. In addition, the State Board of Education was authorized to make other one-time allocations from school consolidation assistance funds based upon the combined enrollment and the number of districts jointly annexed or consolidated. The allowable amount of such assistance ranged from \$500 per student (ADM) for two combined districts to \$800 per student for five combined districts (Lauerman, 1990).

Career Teacher Tenure

HB 1017 replaced the current tenure system for teachers with a streamlined due process system for "career teachers." The law defined a career teacher to be one who has completed three consecutive school years as a teacher at one district under a regular teacher's contract. In addition to the previously existing statutory criteria, the new system allowed for teacher dismissal due to "instructional ineffectiveness," "unsatisfactory teaching performance," and "repeated negligence of duty" (Lauerman, 1991).

Minimum Salary Schedule

HB 1017 included a teacher salary increase plan and an incentive pay option for school districts. The salary plan raised a beginning teacher's salary from \$17,000 in 1990-1991 to \$24,060 in 1994-1995. The law also forbade practices that linked salary increases for administrators solely to those negotiated for teachers. Further, the legislation encouraged school districts to develop unique compensation schedules to reflect each district's particular circumstances, including the option of providing incentive pay plans for teachers. The incentive pay option placed a 20% ceiling on teachers' salary increases for any one year. Any such incentive award would be an annual award and was not to be considered as part of the teacher's base salary. A school district would be required to adopt such a plan upon the petition of 25% of the district's classroom teachers (Lauerman, 1991).

Accreditation Standards

The Oklahoma State Board of Education was charged with the responsibility of ensuring that certain accreditation standards would be required of all public school districts as early as February 1, 1991. Such standards were expected to meet or exceed those of the North Central Association of Colleges and Schools which are currently optional but have been accepted by many Oklahoma schools. While the ensuing standards were to emphasize an outcome-driven approach, they also could not conflict with current state statutes. The standards were to include criteria for school

counselors and require that all high schools meet the accreditation provisions by June 30, 1995. All other levels of education had until June 30, 1999, to meet these minimum standards. State accreditation must be denied or withdrawn from schools which do not meet the accreditation criteria by the specified date(s), and the State Board of Education was authorized to close such schools and reassign students to other accredited schools in the district or to annex the district to one or more other districts so that all children would be educated in an accredited school (Lauerman, 1991).

Common School Fund

In an effort to reduce the unequal funding disparity that existed among school districts, an old idea was brought forth once again that a "Common School Fund" be established for the purpose of more evenly distributing wealth among school districts. A Common School Fund was originally authorized by an amendment to the State Constitution in 1913, but legislation to implement that fund had never been adopted by the legislature. In the compromises that had been necessary for passage of the 1981 school finance reform legislation, another proposal for the Common School Fund was again abandoned. However, great strides were made from 1981 to 1990 in moving toward fiscal neutrality and vertical equity through the revision of the state funding formulas. Common School Fund was put to an statewide vote pursuant to a legislative resolution adopted as a companion to HB 1017. It was determined by a subsequent vote of the people of Oklahoma that the present funding formulas were

adequate and that the Common School Fund would not be established pursuant to the related provisions in HB 1017 (Lauerman, 1991).

Oklahoma Curriculum Committee

Beginning on July 1, 1990 each public school district was required to submit an annual curriculum evaluation to the State Board of Education, which was to use such evaluations for its periodic assessment of the statewide curriculum. The evaluations would also be made available to a 22-member Oklahoma Curriculum Committee which would make recommendations to the State Board of Education by November 1, 1990, and assist the Board in the implementation of curriculum reforms to the extent that the Board so requested.

The primary purpose of the Oklahoma Curriculum Committee was to determine and prescribe desired levels of competencies for students in the public schools; determine the core curriculum needed to support effective instruction of each competency; determine the curriculum needed to provide the opportunity for every student to become proficient in the use of computer technology; delineate which activities shall be designated as extracurricular; review the future role of the State Textbook Committee and the state-recommended textbook list; investigate more efficient means for integrating nonacademic material; and provide for the teaching of hands-on career exploration programs for students in grades 6 through 10.

The curriculum standards were also required to be at least equivalent to those of the North Central Association. The

Committee's curriculum recommendations for high schools were required to ensure that all high school students would have access to course offerings that would enable them to enter a comprehensive university without having to enroll in remediation courses at the university.

The accreditation provisions of HB 1017 also required that the State Board of Education adopt a statewide core curriculum by February 1, 1991, with implementation of the statewide curriculum to be completed by the 1993-1994 school year. The core curriculum was expected by the legislature to ensure attainment of desired levels of competency in a variety of areas, including language, social studies, and communication, so that all students would gain literacy at the elementary and secondary levels through the core curriculum (Lauerman, 1991).

Class Size Reductions

Following an established timeline for gradual decline, maximum allowable class sizes were to be reduced to 20 students in grades K-6. HB 1017 provisions also limited the total number of pupils instructed by most teachers in grades 7-12 to 120 by the 1997-1998 school year. As an additional consideration for class size, school districts were expected to provide a teacher's assistant or volunteer for each class (K-12) with more than 20 pupils when more than 20% of the pupils met the eligibility criteria for the National School Lunch Act.

In addition, the new law stipulated that class sizes would be calculated, by school site, as the average daily membership (ADM) divided by the number of instructional staff, excluding special education classes and Chapter 1 teachers at each site (Lauerman, 1991).

Technology

HB 1017 provided that instructional technology be used to prepare Oklahoma students for lifelong learning in a rapidly changing technological society by providing a basic understanding of computer usage, processes, and systems. It was suggested that this knowledge was necessary for all students, regardless of educational or career goals. The identified priorities had been developed by Task Force 2000 members to provide for utilization of technology throughout the curriculum. The broadly defined goals were related to actually operating a computer; using application software as a tool; developing problem-solving skills; introducing concepts in telecommunications; providing awareness through the study of careers, history, and use of technology in daily lives; and, finally, recognizing responsibilities in ethical situations (Oklahoma State Department of Education, 1994).

Achievement Scores

The present law concerning academic testing for Oklahoma public school students is related to two forms of testing. Criterion-referenced testing is designed to measure outcomes and, as per a

provision of HB 1017 was to be used to measure learning in grades 5, 8, and 11 beginning in the 1994-1995 school year. Mathematics and science were the first two areas to be measured for all three grades, with reading and writing to be used only for grade eight in 1994-1995. Later, U.S. history, government, geography, and culture and the arts were to be added. The eighth grade test is of particular significance in that its passage was to be used to determine whether a student would receive credit for courses taken at the high school level. Students who did not pass the test would be required to receive remediation and would be readministered the test each year until passage or the scheduled time for high school graduation. Courses taken during high school would be "held" until the passage of the CRT, at which time course credit would be granted.

Norm-referenced testing was to be administered to students in grades 7 and 10 and continue to be a part of the state testing program. Mathematics, English, language arts, reading, writing, language, science, and social studies are all areas that were to be tested as a part of an executive order related to HB 1017 (Oklahoma State Department of Education, 1994).

Facility Needs

The author of HB 1017 called for the development of accreditation standards and regulations regarding school facilities. Essentially, school facilities were recognized as providing support for the educational program and contributing to the learning

experiences of students, as well as promoting the safety and health of all occupants. Proper space allocation and equipment for the number of occupants were designated as part of this standard. Handicapped accessibility was also required. Arrangements which provide for optimum instructional functions and class control were identified as components. Preventive and corrective maintenance plans were required of each school district. Long-range plans for replacing and/or updating each building and its equipment were required as a part of the standard. Hazardous materials programs were also required to provide some assurance that a healthy physical environment was being provided for each site occupant (Oklahoma State Department of Education, 1994).

Community Involvement

As a part of the school improvement plan and the comprehensive local education plan, parents were to be involved with school personnel in a committee process with a goal of developing a district plan that would include a mission statement as well as desired exit outcomes for students. The purpose of the committee was also to determine what all students should know, be able to do, and be like in order to succeed when they exited the public schools. This program was to be monitored and assessed each year by the State Department of Education as well as the local district personnel. Where are we now, where do we want to be, and how do we get there were suggested questions to be used as guides in progressing toward the accomplishment of these tasks. Once the local plan was

established, open public meetings were required to explain the plan to the general public.

Also a part of the HB 1017 efforts for outreach to parents and community involvement was the promotion of the Oklahoma Parent Education Program. HB 1017 required the State Board of Education to develop and implement a program of parent education for parents of children birth to age three which would provide for practical information and guidance to parents regarding the development of language, cognition, social skills, and motor development. The fundamental goals of the program were to increase involvement by parents in the educational development of their children; to establish a strong and positive partnership between parents and schools; to promote joint cooperation among school districts, agencies, and organizations in providing services to young children, thereby reducing duplication of services and increased costs; and to intervene in at-risk cases, thus reducing expensive remedial and special education services and retentions (Oklahoma State Department of Education, 1994).

Elementary Foreign Language

To meet the intent of another mandate of HB 1017, all school districts were required to implement a program of study of a least one language other than English. While the language(s) used was at the discretion of the district, the program had several requirements. Language awareness in grades K-3 was to be a program through which children could gain the insight that other languages exist besides

their own. It was to be designed to be an enrichment program and not intended to lead to any particular proficiency skills in language. Curriculum in grades 4-6 was to address the language component with the beginning of a sequential language program through which students would begin to develop actual communication skills in a particular foreign language. The program would be carefully sequenced from grade to grade so that skills and knowledge could be achieved and demonstrated.

In grades 7-12 foreign language instruction would continue sequencing of instruction for in-depth language competencies. More than one program of long-term sequential language offerings was encouraged (Oklahoma State Department of Education, 1994).

Statewide Impact

Superintendents' perceptions of the overall statewide impact of the education reforms were one element of the focus of the first research question. Subjects were asked to gauge the degree of such impact by selecting a rating of "very positive," "somewhat positive," "no impact," "somewhat negative," or "very negative." The analysis of data collected from respondent superintendents is represented in Table VI.

The data in Table VI indicate that over three-fourths of the superintendent respondents identified minimum salary schedule and class size reduction as having had a negative statewide impact, while approximately two-thirds viewed voluntary consolidation, accreditation standards, and technology in a similar way. Around

TABLE VI
 DISTRIBUTION OF SUPERINTENDENTS' 1995 PERCEPTIONS
 OF THE STATEWIDE IMPACT OF HB 1017 REFORMS

Reform	Very Positive (+2)		Somewhat Positive (+1)		No Impact (0)		Somewhat Negative (-1)		Very Negative (-2)		No Response
	f	%	f	%	f	%	f	%	f	%	f
Voluntary Consolidation	2	2.7	10	13.7	14	19.2	46	63.0	1	1.4	0
Career Teacher/Tenure	9	12.5	16	22.2	27	37.5	19	26.4	1	1.4	1
Minimum Salary Schedule	1	1.4	12	16.4	2	2.7	36	49.3	22	30.1	0
Accreditation Standards	1	1.4	10	13.9	14	19.4	39	54.2	8	11.1	1
Common School Fund	2	2.9	14	20.3	18	26.1	33	47.8	2	2.9	4
Oklahoma Curriculum Committee	1	1.4	13	17.8	25	34.2	33	45.2	1	1.4	0
Class Size Reduction	3	4.1	8	11.0	7	9.6	41	56.2	14	19.2	0
Technology	1	1.4	3	4.1	20	27.4	41	56.2	8	11.0	0
Achievement Scores	6	8.3	23	31.9	8	11.1	33	45.8	2	2.8	1
Facility Needs	2	2.8	14	19.7	39	59.9	14	19.7	2	2.8	2
Community Involvement	2	2.7	10	13.7	18	24.7	38	52.1	5	6.8	0
Elementary Foreign Language	1	1.4	17	23.6	19	26.4	30	41.7	5	6.9	1

half of the respondents had negative perceptions of the statewide impact of common school fund, Oklahoma Curriculum Committee, achievement scores, and elementary foreign language. Two areas which received somewhat evenly divided perceptions of impact statewide were career teacher/tenure and facility needs.

Table VII provides a different measure of superintendents' perceptions of the statewide impact of HB 1017 reforms. Scoring each response from +2 for a "very positive" response to -2 for "very negative," mean scores were computed and reported in that table. Except for facility needs, all reforms were perceived as having had a negative impact, with minimum salary schedule (-0.9041), class size reduction (-0.7534), and technology (-0.7123) scoring most negatively. Facility needs had a "perfect" mean score of 0.0000.

Table VIII is used to provide a comparison of the six reform issues identified as significant in the 1990 Lauerman survey and the same six issues as they were perceived in 1995. The perceived impact of career teacher/tenure reform provisions was essentially the same for the 1990 and the 1995 surveys. All other areas reflected a move from the perception that the reform was viewed as "somewhat positive" in the 1990 survey to a 1995 viewpoint that indicated a "somewhat negative" stance. Included in this category were minimum salary schedule, accreditation standards, common school fund, voluntary consolidation, and Oklahoma Curriculum Committee.

The data in Table IX provide a different view of the dramatic shift from the 1990 survey which reflected superintendents' positive perceptions of statewide impact for the six identified reform areas

TABLE VII

SCORING OF SUPERINTENDENTS' 1995 PERCEPTIONS OF THE
STATEWIDE IMPACT OF HB 1017 REFORMS

Reform	Very Positive (+2)	Somewhat Positive (+1)	No Impact (0)	Somewhat Negative (-1)	Very Negative (-2)	Total Scored Response	Mean Score
Voluntary Consolidation							
Frequency	2	10	14	46	1	N=73	-0.4658
Weighted	4	10	0	-46	-2		
Career Teacher/Tenure							
Frequency	9	16	27	19	1	N=72	-0.1806
Weighted	18	16	0	-19	-2		
Minimum Salary Schedule							
Frequency	1	12	2	36	22	N=73	-0.9041
Weighted	2	12	0	-36	-44		
Accreditation Standards							
Frequency	1	10	14	39	8	N=72	-0.5972
Weighted	2	10	0	-39	-16		
Common School Fund							
Frequency	2	14	18	33	2	N=69	-0.2754
Weighted	4	14	0	-33	-4		
Oklahoma Curriculum Committee							
Frequency	1	13	25	33	1	N=73	-0.2740
Weighted	2	13	0	-33	-2		
Class Size Reduction							
Frequency	3	8	7	41	14	N=73	-0.7534
Weighted	6	8	0	-41	-28		
Technology							
Frequency	1	3	20	41	8	N=73	-0.7123
Weighted	2	3	0	-41	-16		
Achievement Scores							
Frequency	6	23	8	33	2	N=72	-0.0278
Weighted	12	23	0	-33	-4		
Facility Needs							
Frequency	2	14	39	14	2	N=71	-0.0000
Weighted	4	14	0	-14	-4		
Community Involvement							
Frequency	2	10	18	38	5	N=73	-0.4110
Weighted	4	10	0	-38	-10		
Elementary Foreign Language							
Frequency	1	17	19	30	5	N=72	-0.2917
Weighted	2	17	0	-30	-10		

TABLE VIII

COMPARISON OF SUPERINTENDENTS' PERCEPTIONS OF THE
STATEWIDE IMPACT OF HB 1017 REFORMS, FREQUENCY
AND PERCENTAGE DISTRIBUTION, 1990 to 1995

Reform	Superintendents' Response										
	Very Positive (+2)		Somewhat Positive (+1)		No Impact (0)		Somewhat Negative (-1)		Very Negative (-2)		No Response
	f	%	f	%	f	%	f	%	f	%	f
Voluntary Consolidation											
1995	2	2.7	10	13.7	14	19.2	46	63.0	1	1.4	
*1990	9	10.3	50	57.5	13	14.9	11	12.6	4	4.6	
Career Teacher/Tenure											
1995	9	12.5	16	22.2	27	37.5	19	26.4	1	1.4	1
*1990	2	2.3	31	35.6	35	40.2	14	16.1	5	5.7	0
Minimum Salary Schedule											
1995	1	1.4	12	16.4	2	2.7	36	49.3	22	30.1	
*1990	33	37.9	45	51.7	4	4.6	3	3.4	2	2.3	
Accreditation Standards											
1995	1	1.4	10	13.9	14	19.4	39	54.2	8	11.1	1
*1990	20	23.0	49	55.3	5	5.7	10	11.5	2	2.3	1
Common School Fund											
1995	2	2.9	14	20.3	18	26.1	33	47.8	2	2.9	4
*1990	19	21.8	36	41.4	11	12.6	19	21.8	2	2.3	0
Oklahoma Curriculum Committee											
1995	1	1.4	13	17.8	25	34.2	33	45.2	1	1.4	
*1990	3	3.4	60	69.0	10	1.5	12	13.8	1	1.1	1

*1990 data reflect results of the Lauerman survey which were published in 1991.

TABLE IX

COMPARISON OF SUPERINTENDENTS' PERCEPTIONS OF THE STATEWIDE
IMPACT OF HB 1017 REFORMS, MEAN SCORES, 1990 TO 1995

Reform	Mean Scores		Change from 1990 to 1995 Survey
	1995	1990	
Voluntary Consolidation	-0.4658	+0.56	-1.0258
Career Teacher/Tenure	-0.1806	+0.13	-0.3106
Minimum Salary Schedule	-0.9041	+1.20	-2.1041
Accreditation Standards	-0.5972	+0.87	-1.4672
Common School Fund	-0.2754	+0.59	-0.8654
Oklahoma Curriculum Committee	-0.2740	+0.60	-0.8740

*1990 data reflects results of the Lauerman survey which were published in 1991.

to a negative perspective of the same six in 1995. The reform issue with the greatest change in perceived statewide impact was minimum salary schedule. In fact, that one reform went from the most positively perceived reform in 1990 to the most negatively perceived in 1995. Other significant areas reflecting loss of support included voluntary consolidation, accreditation standards, common school fund, and Oklahoma Curriculum Committee. Superintendents' 1990 predictions of statewide impact and their current 1995 perceptions regarding such impact are markedly different.

Local Impact

The second focus of the first research question was similar to the first but was focused on the perception of each reform measure's impact on the superintendent's own school district. Superintendents were again asked to report the perceived degree of impact by choosing a rating of "very positive," "somewhat positive," "no impact," "somewhat negative," or "very negative."

Table X provides a summary of the superintendents' views of the reform issue from the local impact perspective as compared to the 1990 Lauerma study. Again, the most dramatic shift in support came from the area of minimum salary schedule. Superintendents' perceptions regarding the impact of salary schedule reform measures move from very positive in 1990 to very negative in 1995. Other areas reflective of the positive to negative shift included voluntary consolidation, accreditation standards, and common school

TABLE X

COMPARISON OF SUPERINTENDENTS' PERCEPTIONS OF THE LOCAL IMPACT OF
HB 1017 REFORMS, MEAN SCORES, 1990 TO 1995

Reform	Mean Scores		Change from 1990 Survey to 1995 Survey
	(1995)	(1990)	
Voluntary Consolidation	-0.4384	+0.54	-0.9784
Career Teacher/Tenure	+0.1806	+0.06	+0.1206
Minimum Salary Schedule	-0.9041	+1.26	-2.1641
Accreditation Standards	-0.7042	+0.79	-1.4942
Common School Fund	-0.2174	+0.60	-0.8174
Oklahoma Curriculum Committee	-0.2329	+0.32	-0.5529
Class Size Reduction	-0.6712	NR	-
Technology	-0.7945	NR	-
Achievement Scores	-0.1250	NR	-
Facility Needs	-0.2500	NR	-
Community Involvement	-0.4658	NR	-
Elementary Foreign Language	-0.1233	NR	-

*1990 data reflect results of the Laueran survey which were published in 1991.

fund. The only area which reflected a move to a more positively viewed perspective was career/teacher tenure.

Table XI data reveal that, in 1995, superintendents viewed minimum salary schedule as having the greatest negative local impact of all the reform issues. Two other areas identified as having a negative impact from the local perspective of dependent public school superintendents were accreditation standards and technology. All other areas were viewed as having a somewhat negative impact locally with the exception of career/teacher tenure. It was viewed as having a somewhat positive impact.

Table XII provides a review of the six reform issues identified as significant in the 1990 Laueran survey, and the same six issues as they appear in 1995. These areas are reflective of the perceptions of the impact of reform elements upon the superintendent's own district. In the area of voluntary consolidation, both the 1990 survey of "no impact" and the "no impact" results found in the 1995 suggest some change in the percentage view of voluntary consolidation in individual districts but is still reflected as "no impact." The "no impact" view of career teacher/tenure reform provisions were essentially the same as the 1990 study. All other areas reflected a move from the perception that the reform was viewed as "somewhat positive" in the 1990 study to a 1995 viewpoint that found the perceptions of the reform issues to be "somewhat negative." The areas included minimum salary schedule, accreditation standards, common school fund, and Oklahoma Curriculum Committee.

TABLE XI

COMPARISON OF SUPERINTENDENTS' PERCEPTIONS OF THE LOCAL IMPACT
OF HB 1017 REFORMS, PERCENTAGE DISTRIBUTIONS, 1990 TO 1995

Reform Issues	Very	Somewhat	No	Somewhat	Very		
	Positive	Positive	Impact	Negative	Negative		
	+2	+1	0	-1	-2		
Voluntary Consolidation	3	9	24	27	10	N=73	-0.4384
	6	9	0	-27	-20		
Career Teacher/Tenure	9	21	18	22	2	N=72	+0.1806
	18	21	0	-22	-4		
Minimum Salary Schedule	2	6	6	42	17	N=73	-0.9041
	4	6	0	-42	-34		
Accreditation Standards	2	8	10	40	11	N=71	-0.7042
	4	8	0	-40	-22		
Common School Fund	2	17	19	26	5	N=69	-0.2174
	4	17	0	-26	-10		
Oklahoma Curriculum Committee	3	12	26	29	3	N=73	-0.2329
	6	12	0	-29	-6		
Class Size Reduction	2	13	6	38	14	N=73	-0.6712
	4	13	0	-38	-28		
Technology	1	2	23	32	15	N=73	-0.7945
	2	2	0	-32	-30		
Achievement Scores	10	20	15	23	4	N=72	-0.1250
	20	20	0	-23	-8		
Facility Needs	1	8	40	18	5	N=72	-0.2500
	2	8	0	-18	-10		
Community Involvement	3	8	23	30	9	N=73	-0.4658
	6	8	0	-30	-18		
Elementary Foreign Language	8	16	17	23	9	N=73	-0.1233
	16	16	0	-23	-18		

TABLE XII

COMPARISON OF SUPERINTENDENTS' PERCEPTIONS OF THE LOCAL
IMPACT OF HB 1017 REFORMS, FREQUENCY AND PERCENTAGE
DISTRIBUTION, 1990 TO 1995

Reform	Superintendents' Responses										
	Very Positive (+2)		Somewhat Positive (+1)		No Impact (0)		Somewhat Negative (-1)		Very Negative (-2)		No Response
	f	%	f	%	f	%	f	%	f	%	f
Voluntary Consolidation											
1995	2	2.7	9	12.3	53	72.6	7	9.6	2	2.7	
*1990	5	5.7	19	21.8	48	55.2	10	11.5	5	5.7	
Career Teacher/Tenure											
1995	2	2.8	18	25.1	41	56.9	10	13.9	1	1.4	1
*1990	1	1.1	25	28.7	45	51.7	14	16.1	2	2.3	
Minimum Salary Schedule											
1995	1	1.4	12	16.4	2	2.7	36	49.3	22	30.1	
*1990	27	31.0	38	43.7	8	9.2	10	11.5	4	4.6	
Accreditation Standards											
1995	2	2.8	5	6.9	20	27.8	36	50.0	9	12.5	1
*1990	15	17.2	45	51.7	13	14.9	11	12.6	2	2.3	
Common School Fund											
1995	3	4.3	19	27.5	19	27.5	24	34.8	4	5.8	4
*1990	23	26.4	25	28.7	14	16.1	19	21.8	6	6.9	
Oklahoma Curriculum Committee											
1995	1	1.4	15	20.5	26	35.6	29	39.7	2	2.7	
*1990	2	2.3	51	58.6	17	19.5	14	16.1	2	2.3	

*1990 data reflect results of the Lauerman survey which were published in 1991.

Other data collected from participating superintendents are represented in Table XIII. Areas identified as having no impact upon the local district were voluntary consolidation, career teacher/tenure, and facility needs. Having a "somewhat negative," impact upon individual districts were minimum salary schedule, accreditation standards, common school fund, Oklahoma Curriculum Committee, class size reduction, technology, achievement scores, community involvement and elementary foreign language. Overall, the respondents indicated that the overall impact of HB 1017 on their local school district has been "somewhat negative."

Support of Education Reforms

Superintendents were asked to indicate their positions in regard to support for each reform by selecting a response of "very supportive," "somewhat supportive," "neutral," "somewhat opposed," or "very opposed." The data collected from each of the respondent superintendents are summarized in Table XIV.

Over half of the superintendents identified themselves as being opposed to 6 of the 12 reform measures, voluntary consolidation, minimum salary schedule, accreditation standards, class size reduction, technology, and, community involvement. The only reform measures which received more supportive responses than opposition were career teacher/tenure and achievement scores. Facility needs drew the most "neutral" response with over half of the superintendents reflecting that choice. In contrast, Lauerman had found that superintendents' position on six reforms from HB 1017

TABLE XIII

DISTRIBUTION OF OKLAHOMA SUPERINTENDENTS' 1995 PERCEPTIONS OF
THE LOCAL IMPACT OF HB 1017 REFORMS

Reform	Superintendents' Response										
	Very Positive (+2)		Somewhat Positive (+1)		No Impact (0)		Somewhat Negative (-1)		Very Negative (-2)		No Response
	f	%	f	%	f	%	f	%	f	%	f
Voluntary Consolidation	2	2.7	9	12.3	53	72.6	7	9.6	2	2.7	0
Career Teacher/Tenure	2	2.8	18	25.1	41	56.9	10	13.9	1	1.4	1
Minimum Salary Schedule	1	1.4	12	16.4	2	2.7	36	49.3	22	30.1	0
Accreditation Standards	2	2.8	5	6.9	20	27.8	36	50.0	9	12.5	1
Common School Fund	3	4.3	19	27.5	19	27.5	24	34.8	4	5.8	4
Oklahoma Curriculum Committee	1	1.4	15	20.5	26	35.6	29	39.7	2	2.7	0
Class Size Reduction	1	1.4	10	13.7	16	21.9	36	49.3	10	13.7	0
Technology	1	1.4	3	4.1	27	37.0	36	49.3	6	8.2	0
Achievement Scores	3	4.2	19	26.4	16	22.2	28	38.9	6	8.3	1
Facility needs	2	2.8	10	13.9	45	62.5	12	16.7	3	4.2	0
Community Involvement	2	2.7	8	11.0	26	35.6	32	43.8	5	6.8	1
Elementary Foreign Language	3	4.2	11	15.3	21	29.2	29	40.3	8	11.1	1

*1990 data reflect results of the Lauerman survey which were published in 1991.

TABLE XIV

OKLAHOMA SUPERINTENDENTS' PRESENT POSITIONS RELATIVE
TO EDUCATIONAL REFORM PROVISIONS IN HB 1017

Reform	Very Supportive (+2)		Somewhat Supportive (+1)		Neutral (0)		Somewhat Opposed (-1)		Very Opposed (-2)		No Response
	f	%	f	%	f	%	f	%	f	%	f
Voluntary Consolidation	3	4.1	9	12.3	24	32.9	27	37.0	10	13.7	0
Career Teacher/Tenure	9	12.5	21	29.2	18	25.0	22	30.6	2	2.8	1
Minimum Salary Schedule	2	2.7	6	8.2	6	8.2	42	57.5	17	23.3	0
Accreditation Standards	2	2.8	8	11.3	10	14.1	40	56.3	11	15.5	2
Common School Fund	2	2.9	17	24.6	19	27.5	26	37.7	5	7.2	4
Oklahoma Curriculum Committee	3	4.1	12	16.4	26	35.6	29	39.7	3	4.1	0
Class Size Reduction	2	2.7	13	17.8	6	8.2	38	52.1	14	19.2	0
Technology	1	1.4	2	2.7	23	31.5	32	43.8	15	20.5	0
Achievement Scores	10	13.9	20	27.8	15	20.8	23	31.9	4	5.6	1
Facility needs	1	1.4	8	11.1	40	55.6	18	25.0	5	6.9	1
Community Involvement	3	4.1	8	11.0	23	31.5	30	41.1	9	12.3	0
Elementary Foreign Language	8	11.0	16	21.9	17	23.3	23	31.5	9	12.3	0

were positive. In fact, more than three of every four of her respondents chose one of the positive support options in regard to minimum salary schedule and over half made similar choices in regard to voluntary consolidation, accreditation standards, and common school fund. None of the six reforms studied by Lauerman drew negative responses from more than 30 percent of the respondents.

One of the items on the survey instrument gave respondents an opportunity to indicate whether their positions regarding the 12 HB 1017 reform measures had changed since the bill's adoption in 1990. Each superintendent was asked to identify a response by selecting from "much more supportive now," "somewhat more supportive now," "no change," "somewhat more opposed now," or "much more opposed now." Table XV contains a summary of the data collected from the participating superintendents. Without exception, support for each reform measure was identified by over two thirds of the respondents as having "not changed" since the adoption of HB 1017. Only in regard to minimum salary schedule did more than 20 percent of the superintendents indicate a specific change, to a more opposed position in regard to that reform. This stands in stark contrast to the changes documented by the separate surveys.

Characterizations of Change

The final focus of the survey was designed to determine how respondents described changes resulting from the 12 HB 1017 reform measures. Superintendents were asked to characterize their perceptions by determining whether the reform issue was "adopted but

TABLE XV

PERCEIVED CHANGE IN OKLAHOMA SUPERINTENDENTS' SUPPORT FOR
HB 1017 REFORMS IN OKLAHOMA PUBLIC EDUCATION, 1990-1995

Reforms	Much More Supportive Now (+2)		Somewhat More Supportive (+1)		No Change (0)		Somewhat More Opposed (-1)		Much More Opposed Now (-2)		No Response
	f	%	f	%	f	%	f	%	f	%	f
Voluntary Consolidation	1	1.4	3	4.1	61	83.6	7	9.6	1	1.4	1
Career Teacher/Tenure	1	1.4	3	4.2	64	88.9	4	5.6	0	0.0	1
Minimum Salary Schedule	1	1.4	7	9.7	48	66.7	14	19.4	2	2.8	2
Accreditation Standards	1	1.4	5	7.0	57	80.3	8	11.3	0	0.0	2
Common School Fund	1	1.4	9	13.0	55	79.7	4	5.8	0	0.0	4
Oklahoma Curriculum Committee	0	0.0	9	12.5	56	77.8	6	8.3	1	1.4	1
Class Size Reduction	4	5.5	9	12.3	55	75.3	5	6.8	0	0.0	0
Technology	1	1.4	2	2.7	60	82.2	9	12.3	1	1.4	0
Achievement Scores	3	4.2	9	12.5	55	76.4	5	6.9	0	0.0	1
Facility needs	0	0.0	3	4.2	66	91.7	3	4.2	0	0.0	1
Community Involvement	2	2.8	2	2.8	57	79.2	10	13.9	1	1.4	1
Elementary Foreign Language	3	4.1	5	6.8	52	71.2	11	15.1	2	2.7	0

not implemented," "initially implemented but abandoned," "implemented but without structural/real change," or "implemented resulting in structural/real change." A summary of the data collected in regard to this issue is presented in Table XVI.

Class size reduction was the only reform identified by a majority of the respondents as having resulted in real, structural change. A majority of superintendents identified nine of the 12 reform measures as having been "implemented but without structural/real change. More specifically, the areas so identified were career teacher/tenure, accreditation standards, Oklahoma Curriculum Committee, technology, facility needs, community involvement, and elementary foreign language. One reform measure not identified in the preceding area was achievement scores, which was identified by over three-fourths of the respondents as having been "initially implemented but abandoned." The other two reforms, voluntary consolidation and minimum salary schedule, were identified by a plurality of respondents as having been "implemented but without real change."

Relationship Between Superintendents' Perceptions and Demographic Variables

The Pearson Correlation Matrix was used to analyze the relationship between the demographic variables of district size, superintendents' age, and years of experience and perceptions of HB 1017 reforms. Comparisons were made to determine the existence of statistically significant relationships. With a

TABLE XVI
 SUPERINTENDENTS' PERCEPTIONS OF THE CHANGES CREATED
 BY HB 1017 REFORMS IN OKLAHOMA

Reform	Adopted but not Implemented		Implemented but abandoned		Implemented but without real change		Implemented resulting in structural real change		No Response
	f	%	f	%	f	%	f	%	f
Voluntary Consolidation	7	9.7	23	31.9	33	45.8	9	12.5	1
Career Teacher/Tenure	3	4.4	3	4.4	59	86.8	3	4.4	5
Minimum Salary Schedule	0	0.0	14	21.9	27	42.2	23	35.9	9
Accreditation Standards	3	4.3	3	4.3	35	50.0	29	41.4	3
Common School Fund	7	10.3	11	16.2	33	48.5	17	25.0	5
Oklahoma Curriculum Committee	5	7.4	6	8.8	37	54.4	20	29.4	5
Class Size Reduction	0	0.0	2	3.0	27	40.3	38	56.7	6
Technology	9	13.4	2	3.0	35	52.2	21	31.3	6
Achievement Scores	5	6.9	55	76.4	9	12.5	3	4.2	5
Facility needs	11	17.5	6	9.5	36	57.1	10	15.9	10
Community Involvement	4	5.8	2	2.9	49	71.0	14	20.3	4
Elementary Foreign Language	4	6.0	2	3.0	39	58.2	22	32.8	6

significance level of .05, the required r value was determined to be 0.0457. Of the 180 possible relationships (five perceptions, three demographic variables, 12 reforms), 16 were found to be statistically significant at the .05 level.

Table XVII shows r values regarding the correlation between the respondents' perceptions of voluntary consolidation and the demographic variables of district size and respondent's age and years of experience. Statistically significant correlations were found between district size and the perceptions of superintendents regarding the overall impact of voluntary consolidation on the state ($r=0.0065$), the impact of voluntary consolidation upon the local district ($r=0.0245$), and their position relative to support for that reform ($r=0.0005$). In other words, the smaller the school districts, the greater the likelihood that the superintendent not only was opposed to the reform but perceived voluntary consolidation to have had a negative impact on the state and on local districts. The only other statistically significant correlation reported in Table XVII was between superintendents' age and perception of the impact of voluntary consolidation upon the local district ($r=0.0265$).

As shown in Tables XVIII and IXX, no significant correlations were found between superintendents' perceptions of the career teacher/tenure and salary minimum salary schedule provisions of HB 1017 and the demographic variables.

Data in Table XX reflect statistically significant correlations between both district size and superintendent's years of experience

TABLE XVII

CORRELATION BETWEEN SUPERINTENDENTS' PERCEPTIONS OF VOLUNTARY
CONSOLIDATION AND DEMOGRAPHIC VARIABLES

Perception	Demographic Variables		
	Size	Age	Experience
Impact on State	0.0065*	0.0256*	0.8209
Impact on District	0.0245*	0.3211	0.3543
Present Position	0.0005*	0.8695	0.3519
Has Position Changed?	0.1927	0.6452	0.4729
View of Change	0.7822	0.8176	0.7930

* Indicates statistically significant correlation at .05 level

TABLE XVIII

CORRELATION BETWEEN SUPERINTENDENTS' PERCEPTIONS OF CAREER
TEACHER/TENURE AND DEMOGRAPHIC VARIABLES

Perception	Demographic Variables		
	Size	Age	Experience
Impact on State	0.8031	0.5907	0.6869
Impact on District	0.3875	0.4477	0.5348
Present Position	0.8157	0.8707	0.3760
Has position changed?	0.6916	0.7467	0.8995
View of Change	0.7585	0.1661	0.2422

* Indicates statistically significant correlation at .05 level

TABLE IX

CORRELATION BETWEEN SUPERINTENDENTS' PERCEPTIONS OF
MINIMUM SALARY SCHEDULE AND DEMOGRAPHIC VARIABLES

Perception	Demographic Variables		
	Size	Age	Experience
Impact on State	0.9845	0.1091	0.8455
Impact on District	0.4394	0.5374	0.5123
Present Position	0.4388	0.9685	0.5228
Has position changed?	0.3640	0.6108	0.0648
View of Change	0.7704	0.1732	0.3265

* Indicates statistically significant correlation at .05 level

TABLE XX

CORRELATION BETWEEN SUPERINTENDENTS' PERCEPTIONS OF
ACCREDITATION STANDARDS AND DEMOGRAPHIC VARIABLES

Perception	Demographic Variables		
	Size	Age	Experience
Impact on State	0.0348*	0.8837	0.0350*
Impact on District	0.0713	0.5937	0.2620
Present Position	0.0969	0.4711	0.1214
Has position changed?	0.6331	0.8027	0.8139
View of Change	0.2915	0.5032	0.1826

* Indicates statistically significant correlation at .05 level

and the perceptions of superintendents regarding the statewide impact of accreditation standards. A statistically significant correlation is shown in Table XXI between district size and the superintendent's view of the change associated with the common school fund. As shown in Table XXII, no significant correlations were found between superintendents' perceptions of Oklahoma Curriculum Committee provisions of HB 1017 and the demographic variables.

Table XXIII data reflect statistically significant correlations between years of experience and the superintendent's views regarding class size reduction impact on the state ($r=0.0080$), class size reduction impact on the district ($r=0.0087$), and the changes associated with class size reduction ($r=0.0172$). As shown in Table XXIV, a significant correlation was found between district size and the superintendent's viewpoint regarding the change of technology ($r=0.0295$).

In Table XXV, a significant correlation is shown between district size and the superintendents' perception of the impact of achievement scores on the district ($r=0.0457$). Also, a statistically significant correlation existed between the present position of support of superintendents in regard to achievement scores and district size ($r=0.0406$). Table XXVI data reflect a significant correlation between age and the superintendent's position regarding facility needs ($r=0.0328$).

Table XXVII data indicate that a statistically significant correlation exists between the superintendent's perception of change

TABLE XXI

CORRELATION BETWEEN SUPERINTENDENTS' PERCEPTIONS OF COMMON
SCHOOL FUND AND DEMOGRAPHIC VARIABLES

Perception	Demographic Variables		
	Size	Age	Experience
Impact on State	0.6419	0.8752	0.3430
Impact on District	0.0885	0.9811	0.1161
Present Position	0.2420	0.9358	0.8205
Has position changed?	0.6704	0.9607	0.8466
View of Change	0.0134*	0.9139	0.6847

* Indicates statistically significant correlation at .05 level

TABLE XXII

CORRELATION BETWEEN SUPERINTENDENTS' PERCEPTIONS OF OKLAHOMA
CURRICULUM COMMITTEE AND DEMOGRAPHIC VARIABLES

Perception	Demographic Variables		
	Size	Age	Experience
Impact on State	0.0560	0.4126	0.3615
Impact on District	0.0779	0.5290	0.5190
Present Position	0.1434	0.0542	0.7765
Has position changed?	0.3451	0.6427	0.4898
View of Change	0.7837	0.7055	0.3881

* Indicates statistically significant correlation at .05 level

TABLE XXIII

CORRELATION BETWEEN SUPERINTENDENTS' PERCEPTIONS OF CLASS
SIZE REDUCTION AND DEMOGRAPHIC VARIABLES

Perception	Demographic Variables		
	Size	Age	Experience
Impact on State	0.6367	0.8139	0.0080*
Impact on District	0.1098	0.2551	0.0087*
Present Position	0.4679	0.8069	0.1127
Has position changed?	0.1333	0.5181	0.6612
View of Change	0.2943	0.7792	0.0172*

* Indicates statistically significant correlation at .05 level

TABLE XXIV

CORRELATION BETWEEN SUPERINTENDENTS' PERCEPTIONS OF
TECHNOLOGY AND DEMOGRAPHIC VARIABLES

Perception	Demographic Variables		
	Size	Age	Experience
Impact on State	0.4982	0.7041	0.3957
Impact on District	0.6882	0.8960	0.3508
Present Position	0.9742	0.3109	0.8115
Has position changed?	0.7101	0.1274	0.0920
View of Change	0.0295*	0.4982	0.9733

* Indicates statistically significant correlation at .05 level

TABLE XXV

CORRELATION BETWEEN SUPERINTENDENTS' PERCEPTIONS OF
ACHIEVEMENT SCORES AND DEMOGRAPHIC VARIABLES

Perception	Demographic Variables		
	Size	Age	Experience
Impact on State	0.0884	0.5828	0.8461
Impact on District	0.0457*	0.3709	0.4584
Present Position	0.0406*	0.1667	0.7913
Has position changed?	0.1945	0.1056	0.1944
View of Change	0.1821	0.9256	0.4054

* Indicates statistically significant correlation at .05 level

TABLE XXVI

CORRELATION BETWEEN SUPERINTENDENTS' PERCEPTIONS OF
FACILITY NEEDS AND DEMOGRAPHIC VARIABLES

Perception	Demographic Variables		
	Size	Age	Experience
Impact on State	0.8196	0.0613	0.3051
Impact on District	0.9023	0.2612	0.4207
Present Position	0.4853	0.0328*	0.5267
Has position changed?	0.5388	0.5314	0.7805
View of Change	0.2055	0.1288	0.8625

* Indicates statistically significant correlation at .05 level

TABLE XXVII

CORRELATION BETWEEN SUPERINTENDENTS' PERCEPTIONS OF
COMMUNITY INVOLVEMENT AND DEMOGRAPHIC VARIABLES

Perception	Demographic Variables		
	Size	Age	Experience
Impact on State	0.0961	0.4604	0.0703
Impact on District	0.1707	0.2585	0.1696
Present Position	0.0198*	0.4944	0.1793
Has position changed?	0.5533	0.7721	0.0322*
View of Change	0.9519	0.9641	0.1014

* Indicates statistically significant correlation at .05 level

TABLE XXVIII

CORRELATION BETWEEN SUPERINTENDENTS' PERCEPTIONS OF ELEMENTARY
FOREIGN LANGUAGE AND DEMOGRAPHIC VARIABLES

Perception	Demographic Variables		
	Size	Age	Experience
Impact on State	0.2489	0.2835	0.1839
Impact on District	0.7759	0.3249	0.9688
Present Position	0.5082	0.5328	0.2273
Has position changed?	0.6615	0.3343	0.2332
View of Change	0.1639	0.5355	0.7993

* Indicates statistically significant correlation at .05 level

in position regarding community involvement and the number of years of experience ($r=0.0322$). Further, a significant correlation also exists between the superintendents' present position regarding community involvement and the size of the district ($r=0.0198$). As shown in Table XXVIII, no significant correlations were found between superintendents' perceptions of elementary foreign language provisions of HB 1017 and the demographic variables.

Of the 16 statistically significant correlations, nine involved the demographic variable of district size. Four of the correlations were associated with voluntary consolidation, three of which involved district size. In other words, the superintendents of smaller school districts were more likely to have negative perceptions of consolidation, a view not likely to be shared by those in the larger districts. Perceptions of class size reduction were significantly correlated, in three instances, with the years of experience accrued by the superintendent.

Superintendent Comments Regarding

HB 1017 Reform

For each reform issue, the respondents' comments were requested, first regarding factors leading to a change in position on the reform and then for open comments. Many of the superintendents' responses revealed a difference among their opinions regarding many of the reform issues identified in this study. In regard to voluntary consolidation, responses ranged from "Voluntary - OK., Mandatory - Never"! to "There are far too many

school districts in Oklahoma." In the area of career teacher/tenure, many viewed the change in the law as having had little impact and, in some cases, reported that tenure had been strengthened. Superintendent comments regarding minimum salary schedule focused on support for the increase in the salary but with much discontent over the lack of funding for the mandate and the failure to provide funding for salary increases for career teachers.

In regard to accreditation standards, the comments that were expressed could be captured in the quote "Good changes - NEED MONEY"! No one strongly disagreed that the standards couldn't help improve education in Oklahoma. However, most agreed that, without funds, the possibility for lasting implementation was suspect. On the issue of common school fund, one comment referred to perceptions of the public with the statement, "In Oklahoma, patrons think small dollars are large." Another responded that "local revenue should stay local." Superintendents' comments on the work of the Oklahoma Curriculum Committee ranged from support for the focus it brought to teachers to statements that decried the lack of funds for implementation and the weakness of statewide accountability.

Most superintendents favored the class size reduction found in HB 1017 in principle; however they found great difficulty in accomplishing the mandate because of the lack of funding and facilities at the secondary level. Many asked for a reprieve from the mandates. Regarding technology, many of the superintendents were supportive of the concept of technology and its use but again

cited the lack of funding to complete the mandate as it could and should be addressed.

Response regarding achievement testing reflected a great deal of consternation as adjectives such as "stupid!" and "Messed Up!" appeared to be the general consensus of opinion regarding new regulations. In commenting on facility needs, many superintendents saw the need to address funding for additional structures. Some indicated that bond issues were used to build new libraries while others indicated a long history of bond issue failure with little relief in sight.

Almost every superintendent who commented on the issue of community involvement indicated that this reform issue had played a positive role in the community. The final area of reform, elementary foreign language, received a lukewarm reception with comments regarding the lack of funding and time to teach other core curricula.

A listing of all the comments regarding the identified reform issues can be found in narrative form in the Appendixes.

CHAPTER V

SUMMARY, CONCLUSIONS, RECOMMENDATIONS

AND COMMENTARY

The stage was set for educational reform when, in October of 1957, the Russian-fired Sputnik entered orbit around the earth. That single event triggered more public interest and generated more action in education reform than any activity up to the release of A Nation at Risk: The Imperative for Educational Reform in 1983. In the interim, a series of federal education acts had been developed, beginning with the National Defense Education Act of 1958 (NDEA) and followed by the Elementary and Secondary Education Act of 1965 (ESEA) and the Education for All Handicapped Children Act of 1975 (94-142). On the national scene, such reforms as "new math," open classrooms, and the effective schools movement had emerged as solutions to educational problems, had been widely implemented, and in many cases had already been phased out and forgotten.

Oklahoma was not immune to the influence of these national educational movements and educators participated in many, sometimes by choice, other times by statutory or regulatory mandate. In 1980, the passage of HB 1706 set the stage for change at the state level and provided for such reforms as field-based experience and competency testing for educators, assistance for entry year teachers, and mandated staff development activities.

Curriculum alignment, more equitable funding formulas, gifted and talented programs, teacher evaluation, and other reform efforts had been included in other legislation considered prior to the 1990 passage of the omnibus education reform act, House Bill 1017.

The passage of HB 1017 was not without debate. The development of the controversial bill began when Governor Henry Bellmon called a special legislative session and, with cooperation of the legislative leadership, activated a 31-member "Task Force 2000," whose charge was to develop a blueprint for the immediate and the future needs of public education in Oklahoma. The members of this group provided their final recommendations in the form of a report submitted to the Oklahoma Legislature on November 6, 1989. This report provided much of the content for the reform efforts written into HB 1017 which was eventually signed into law on April 25, 1990.

Initially, some argument ensued regarding the passage of the bill because of the tax burden needed for implementation. Opponents asked "Did the cost equal the benefits?" Later, an argument emerged as to whether HB 1017 had provided for "real" change through its reform provisions or had merely intensified what had already existed; had it provided a real or structural change in schools? The degree of support or opposition among superintendents in the state to the reform measure was the focus of a survey conducted by Lauerman in 1990 for a study whose results were published in 1991. Her study was focused on the perceptions of superintendents both before and immediately after the passage of HB 1017.

Five years after the passage of HB 1017, the concerns and questions are still raised. After those years of implementation, have the perceptions of superintendents changed? The purpose of this study, then, was to focus on Oklahoma independent school district superintendents' perceptions of change in relation to the educational reforms associated with HB 1017 five years after its adoption and to determine if the current perceptions reflected any change by comparison to the Lauerman study. The following questions served as focal points for this study.

1. How do superintendents assess the potential impact and effectiveness of change and reform? How has that assessment changed since 1990?

2. To what degree do school superintendents support or oppose the reform efforts in Oklahoma? How has that perception changed since 1990?

3. Does the regional location, school district size, or superintendent's age, gender, or amount of experience affect the manner in which a superintendent perceives education change and reform?

A survey instrument was mailed to 108 randomly selected independent school district superintendents from the population of 433 superintendents in Oklahoma. Using Likert-type scales, the superintendents were asked to rank their responses to items which focused on their perceptions of statewide impact, of local impact, and of their degree of support in regard to 12 major reforms contained in HB 1017. Of the 108 questionnaires which were distributed, 73

were returned for a 68% response rate. In addition to an analysis of correlation among variables, data from the questionnaire were reported through descriptive statistics using frequency, percentage distribution, and measures of central tendency.

The primary portion of the survey dealt with 12 specific reform issues. Six of the issues had been identified in the 1990 Lauerman study which involved a 1990 survey and 1991 publication of the findings. The other six were identified by a two-round, modified Delphi survey of leading Oklahoma school superintendents in 1995. The issues included in both studies were voluntary annexation or consolidation, career teacher/tenure, minimum salary schedule, accreditation standards, common school fund, and Oklahoma Curriculum Committee. The six reform issues which had emerged by 1995 as significant were class size reduction, technology, achievement scores, facility needs, community involvement, and elementary foreign language.

The population was identified though data from the Oklahoma State Department of Education and reflects a total of 433 districts, 14 less in 1995 than the number identified in the 1991 Lauerman study. An analysis of demographic data revealed, however, that the respondents closely matched both the current population and the respondents to Lauerman. The demographic data, the typical Oklahoma superintendent, both in the respondent group and in the population, is male over the age of 40 with considerable experience in that position. The superintendent serves a small school district, more likely in the eastern part of the state.

Superintendents' perceptions of the overall statewide impact of the education reforms were the focus of the first research question. Over half of the respondents identified voluntary consolidation, accreditation standards, class size reduction, technology, and community involvement as having had a "negative," statewide impact. Nearly half also identified minimum salary schedule, common school fund, Oklahoma Curriculum Committee, achievement scores, and elementary foreign language as having had a "negative" impact. Two areas identified as having no impact statewide were career teacher/tenure and facility needs. Achievement scores, while being identified as somewhat negative by nearly half the respondents, was also identified by nearly a third of the respondents as having had a somewhat positive impact.

While superintendents' perceptions of the impact of career teacher/tenure reform provisions remained essentially the same from 1990 to 1995, all other reforms were perceived more negatively in 1995 than in the 1990 survey reported by Lauerman (1991). The greatest shift in perception was focused on minimum salary schedules.

The second research question was similar to the first but was focused on the superintendent's perception of impact on the level school district. Again, the most dramatic shift in support came in regard to minimum salary schedule with superintendents' perceptions moving from very positive in 1990 to very negative in 1995. Other areas reflective of the positive to negative shift included voluntary consolidation, accreditation standards, and

common school fund. The only reform which reflected a move to a more positive view was career teacher/tenure. Overall, the respondents indicated that the overall impact of HB 1017 on their local school districts had been somewhat negative.

The third research question gave respondents an opportunity to describe their own positions regarding each of the 12 identified reform areas. Superintendents were somewhat opposed to nearly all the reform measures. The only reform measure not opposed by superintendents in 1995 was facility needs which was essentially given a neutral response. Without exception, support for each reform measure was identified by a majority of respondents as having not changed since the adoption of HB 1017.

Superintendents identified ten of the 12 reform measures as having been "implemented but without structural/real change. Achievement scores were identified as having been initially implemented but abandoned while class size reduction was identified as having been implemented resulting in structural or real change. Overall, the respondents indicated that many of the reform efforts were implemented but did not create real change.

The Pearson Correlation Matrix was used to analyze the relationship between the demographic variables of district size and superintendents' age and years of experience, and their perceptions of HB 1017 reforms. Comparisons were made to determine whether statistically significant relationships existed for the possible comparisons. With a significance level of .05, 16 of the 180

possible relationships were found to be statistically significant. Most of the correlations involved district size, including three with perceptions of voluntary consolidation. The superintendent's years of experience were found to be significantly related to three different perceptions of class size reduction.

When asked for comments, the respondents tended to focus on issues related to funding. While many indicated support for the concept of education reform, they noted that failure to adequately finance such reforms had led to opposition, as had other details related to implementation.

Conclusions

1. The overall perceptions of superintendents regarding reform issues have shifted from a somewhat positive and optimistic mode as identified in the 1990 Lauerman survey, to a somewhat negative mood of pessimism in 1995. Many of the comments suggested that such negativism had in its roots the lack of funding to accomplish the mandates.

2. Superintendents in 1995 are less supportive of HB 1017 reforms than they were in 1990 and also perceive both the local and the statewide impact of those reforms to be less positive than in 1990.

3. Superintendents do not regard the HB 1017 reforms as real, structural changes. The only reform identified as a change in structure or a real change had to do with class size reduction. This strong show of negativism for a majority of the reforms might

support Fullan's idea that most reform initiatives today are merely "non-events" or "superficial" rather than normative changes (Fullan, 1991, p. xiii).

Recommendations

1. A study regarding the perceptions of state legislators and other policymakers regarding the reform elements identified in this study and one earlier study by Lauerman would provide an opportunity to compare their viewpoints with those of the school superintendents. Similarly, the perceptions of teachers, school board members, and the general public might be studied to provide still more comparative views.

2. Fullan and others have argued that change is a process and not an event. Even moderately complex changes may take from three to five years, and major restructuring efforts from five to ten years. Therefore, it would be interesting to conduct a follow-up study of perceptions regarding the reform issues in the year 2000 to determine which reforms have then been routinized into practice and which have not.

3. According to Fullan, reform efforts characterized as change are dependent upon three factors: relevance, readiness, and resources. Many times the efforts at change ignore the needs of teachers relative to the first two elements and shift more to the administrative issue of resources. A study to identify what teachers consider to be significant among the HB 1017 reform issues

and their views regarding the implementation of the reforms may prove enlightening in contrast to an administrative viewpoint.

4. Deregulation of regulatory standards, authorized by HB 1017, would appear to some as an effort to provide for attention to the specific needs of individual school districts. A study regarding the efforts at deregulation, including the actions by the State Board of Education, would provide a list of categorical information which could be related to the issue of reaching the "near occasion" of change (Marris, 1975, p. 16).

Commentary

This study has three purposes. First, it was designed to identify perceptions of superintendents regarding what reform issues in HB 1017 were of major concern or interest in 1995. Second, it provided an opportunity to identify the perceptions of superintendents regarding the state and local impact and their support or opposition to the identified reforms. Third, it provided a view of how superintendents' perceptions had changed from 1990, as identified by a study conducted by Lauerman (1991).

What began as an interest in the reform issues found in HB 1017 quickly broadened to a focus on the change process and how it relates to the elements of reform found in HB 1017. Fullan's theory of change embellished the "canvas" which held the reform bill to include a three-dimensional perspective (theory) of why one may anticipate success or failure of its various components.

The argument that the inertia contained in preserving the status quo or present structure of education is indicative of the findings of this study. According to perceptions of superintendents, the only area of the 12 reforms identified as having constituted real change was class size. All 11 of the other issues were viewed as having been implemented but not providing for real or structural change. As Fullan suggested, the success of change finds itself in the realm of relevancy, readiness, and resources. All must work in tandem to create a network of support to create some form of routinizing within the existing framework. Using the argument that this routinizing must take place over a time frame that runs from three to five years for moderately complex changes and up to 5 to 10 years for major restructuring efforts provides some view of the difficulties that are being experienced in regard to the reform efforts provided for in HB 1017. In accord with Fullan's beliefs, HB 1017 is in Phase II. Phase III is the telling phase which determines whether the change gets built in as an ongoing part of the system or disappears by way of attrition or a decision to discard (Fullan, 1991). If Fullan's theory regarding change is relevant, reforms found in HB 1017 are indeed on shaky ground. One might ask how this judgment can so easily be reached. A justification would begin with the "R" of resources.

Fracture lines in the bill developed early and continue to haunt its successful implementation today. Dan Brown and the Stop New Taxes organization failed in the initial bid to halt the funding of HB 1017. However, in a subsequent statewide vote, they

successfully completed an initiative to permit no new statewide taxes without supermajority approval in the legislature or a vote of the state electorate. Many viewed STOP's loss on HB 1017 and subsequent win on the tax question as education winning the battle but losing the war on additional funding. Some would argue that the "mandate" created by the statewide vote of the people on HB 1017 was the only factor that allowed it to be spared during its early existence from the financial reductions experienced by other governmental services during that period. Some reports have indicated that the present governor has considered reallocating some of the tax revenue originally supporting HB 1017 efforts to other government needs in the state. The new constitutional provision requiring a two-thirds vote of both the House and the Senate to create new taxes or raise existing taxes seems to make significant revenue increases remote at best.

Many superintendents across the state share the view that mandated increases in teacher salary schedules over the past five years have been only partially funded. Many have reached into general fund carry-over, and/or resorted to attrition or, when necessary, reductions in force to meet minimum salary schedule costs. A number of Oklahoma school districts face the prospect of beginning the 1996 fiscal year with no new money, no carryover or at best minimal carryover, and mandates to provide additional salary schedule increments, to meet mandatory class size requirements in the secondary subject areas, and to address foreign language requirements which are now moving from elementary into the middle

grades. This is complicated by the possibility that federal funding may be reduced or in some cases eliminated. The point? If resources are one of the three essential elements to create successful change, the HB 1017 reforms would appear to be in jeopardy.

The second element of change is that of relevancy. Huberman and Miles (1984) suggested that central office administrators are at the locus of decision-making and are equally powerful in efforts to either block or support educational change and reform. However, part of the reality for administrators and teachers alike is that education has a "huge negative legacy of failed reform that cannot be overcome simply through good intentions and powerful rhetoric" (Fullan, 1991, p. 354). An example of one such failed reform effort related to HB 1017 is outcomes based education (OBE). Many reform-minded superintendents who viewed this instructional method as the framework by which the existing structure of public education could be reworked and revitalized found themselves the focus of criticism by well-meaning patrons. The support for OBE which originated in the Oklahoma State Department of Education following the passage of HB 1017 was abruptly withdrawn. Teachers who were given the OBE-related "student outcomes" to guide their classroom instruction were as quickly told to dispose of them and replace them with the new "Priority Academic Student Skills" (PASS). Teachers were informed that all seniors would be taking literacy tests in order to graduate with a diploma only to find that provision had been rescinded and replaced with a governor's executive order

establishing a "Literacy Passport" for all eighth grade students to be provided upon passing a criterion-referenced test to be constructed from the PASS based curriculum. The 1995 change in the governor's office has created the latest twist in the state testing saga with the question of whether the new governor will sign an executive order to the same effect, whether the 1995 legislature will pass a bill making the Literacy Passport a statutory provision, or whether this reform will end. Some argument also continues regarding the legality of such a test and, the final status remains uncertain this time. While none of the preceding content was designed to point a finger of blame at any group or individual, frustrated superintendents who are charged with the duty of continually negotiating and monitoring relationships with school staff and attempting to stay within an acceptable corridor of autonomy, accountability, variation, and consistency while at the same time creating conditions that foster the process of change find themselves criticized and left responsible for reform issues or changes gone awry. The credibility and relevance issues have seriously stained the relationships between superintendents and those who deliver the services, the teachers. If relevance is the second necessary ingredient of successful reform or change, the future again is somewhat cloudy.

Readiness is the final "R" mentioned by Fullan regarding change and reform. As has already been discussed, the inertia of the present structure has extreme staying power. One of the reasons for this staying power is the general problem regarding the meaning of

change. Being ready for change means that one must either voluntarily or forcibly be involved in a process that involves loss, anxiety, and struggle (Marris, 1975). Some would suggest that people face change with ambivalence and have a strong tendency to adjust to the near occasion of change by changing as little as possible. The saying "the more things change, the more they stay the same" seems relevant at this point. Many would argue that the changes found in HB 1017 are, on the surface, good and needed changes. While many Oklahoma superintendents would agree that the bill addressed perceived needs, they would also argue that its provisions are not reasonable and compatible with the facilities, equipment, materials, and supplies needed to accomplish change.

In effecting change, specifically those areas identified as relevant in this study, superintendents must remember that even poor beginnings have chances of success. They must be careful to nurture the promising start-ups as well as continuing to maintain vigilance on those areas that have had poor beginnings. While HB 1017 was considered to be an omnibus education reform bill providing great challenges for all public schools in Oklahoma, research has shown that "ambitious projects were less successful in absolute terms of the percent of the project goals achieved, but they typically stimulated more teacher change than projects attempting less" (Berman & McLaughlin, 1977, p. 88).

According to the respondents' comments found in the appendices, pressure to complete reform efforts without full financial support appears to be taking its toll. The effects of resistance and

alienation are natural by-products of such action and may provide some explanation regarding the change in perceptions of many state superintendents from a somewhat positive viewpoint found in the Lauerman survey of 1990 superintendents to a considerably more negative viewpoint found in this study. When change occurs, most individuals realize that it carries with it elements of confusion and uncertainty. With the proper leadership, interaction with others, and strong support by the superintendent, these issues can be addressed within the multiple realities that people possess regarding change. Relevance and readiness are achievable goals. However, without efforts to provide the needed resources to accomplish the changes mandated in House Bill 1017, one third of the essential ingredient for successful change is still not realized. The success or failure of HB 1017 reform efforts hangs precariously on the ledge of a precipice that must be shorn up with all three elements for lasting change to occur.

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APPENDIXES

APPENDIX A

CORRESPONDENCE



**OKLAHOMA
ASSOCIATION
SCHOOL
ADMINISTRATORS**



**EUGENE V. KEITH
EXECUTIVE DIRECTOR**

4010 LINCOLN BOULEVARD • SUITE 106 • OKLAHOMA CITY, OKLAHOMA 73105 • (405) 427-5454

February 23, 1995

Dear Fellow Superintendent:

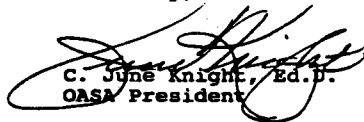
It is my pleasure to write to you on behalf of Steve Hart, Assistant Superintendent at Blackwell Schools, and in support of his research efforts. Mandates of House Bill 1017 impacted and continue to impact each individual district. Research regarding how Oklahoma superintendents perceive these mandates and effects at district level is limited.

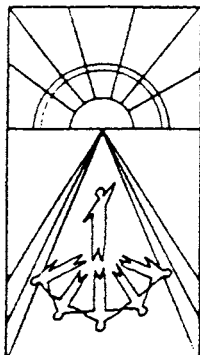
A study is currently being conducted in conjunction with Oklahoma State University and the Oklahoma Commission for Educational Leadership regarding perceived effects of HB1017 by school superintendents. The Oklahoma Association of School Administrators (OASA) has participated in the study by identifying HB1017 components considered as having the greatest impact on Oklahoma education. The current study is in need of your assistance.

Enclosed is a questionnaire which gives each district superintendent an opportunity to anonymously respond to many of the provisions of HB1017. Data gleaned from responses will provide a research basis for the perceptions of district superintendents.

I encourage you to take a few minutes to participate in this research effort on behalf of your profession and school districts in Oklahoma. OASA and CCOSA will receive copies of the completed research which will be available for review by interested educators. On behalf of Mr. Hart, please accept our appreciation for your time and expertise.

Sincerely,


C. June Knight, Ed.D.
OASA President



**The
Oklahoma
Commission for Educational Leadership**

Dr. D. Bruce Howell
Executive Director
Oklahoma Commission on Educational Leadership
P.O. Box 4195
Tulsa, Oklahoma 74159-0195

Dear Superintendent:

During their first quarter meeting held on December 1, 1994, the Executive Committee of the Oklahoma Commission on Educational Leadership approved the context of a proposal to review attitudes and perceptions of superintendents regarding the impact of HB 1017. The efforts of the OCEL in the support of educational administrative research is an ongoing priority. The financial assistance granted to this project by the OCEL is designed to assist in the provision of the most up-to-date information regarding the impact of HB 1017 as it is perceived by your district as well as other districts across the state.

You have purposefully been selected to participate in this study. The completion and return of the enclosed questionnaire is vital to the statistical validity and reliability of the population sample identified in this project. I would ask that you take a few minutes from your extremely busy schedule to promptly complete and return this information. Your participation in this project is of great value to all practicing superintendents. The results of this information will be made available to all OCEL members, and upon request, to other school superintendents across the state. Thank you in advance for your willingness to participate in this research.

Sincerely,

Dr. D. Bruce Howell
Dr. D. Bruce Howell
Executive Director, OCEL



OKLAHOMA ASSOCIATION OF ELEMENTARY
SCHOOL PRINCIPALS

OKLAHOMA ASSOCIATION OF
SCHOOL ADMINISTRATORS

OKLAHOMA ASSOCIATION OF
SECONDARY SCHOOL PRINCIPALS

EUGENE V. KEITH
EXECUTIVE DIRECTOR

J.B. FLATT
DEPUTY EXECUTIVE DIRECTOR

JAMES R. BURNE
ASSOCIATE EXECUTIVE DIRECTOR

*Selected Superintendents
Public School Districts
Oklahoma*

Dear Superintendent:

At the December 8, 1994, and January 5, 1995, OASA Executive Board Meetings, members were asked to respond to the question, what HB 1017 changes have had the biggest impact on Oklahoma Education? The results of this information have become the basis for a doctoral study at Oklahoma State University regarding perceptions of Superintendents as they relate to specific areas of HB 1017. This research is designed to provide information regarding change and how each district superintendent perceives that change in relation to their own district. Further, it will be determined how each district perception relates to the perception of the state superintendent population.

Copies of the research will be provided to the Cooperative Council for Oklahoma School Administration as well as to those superintendents who request the data. This information could prove valuable in assisting in the development of and support for future legislation that affects all Oklahoma Public Schools.

Please take this opportunity to anonymously report how you really feel about HB 1017. It will take only minutes to complete and mail this information. Your participation is helpful to future decision-making.

Sincerely,

Gene Keith
Gene Keith
Executive Director



2801 Lincoln Boulevard • Oklahoma City • Oklahoma 73105
Telephone: (405) 524-1191

February 23, 1995

Dear Superintendent:

This letter is to request a few minutes of your time to respond to a questionnaire regarding House Bill 1017. This Bill was one of many across the Nation designed to address statewide educational reform following the publication of the Nation at Risk Report. As you are well aware, HB 1017 has come to impact each district in different and sometimes unforeseen ways. After its passage in 1990, many differences of opinion existed and continue to exist into 1995.

This questionnaire is being mailed to selected public school superintendents throughout the State for the purpose of establishing the differences of opinion that exist today, and how these differences compare to those found to exist in 1990. Every opinion and response is essential as the results of the responses will be utilized to provide a basis for doctoral research that has been approved and financially supported by the Oklahoma Commission for Educational Leadership. A summary of the findings will be made available to all members of that organization, to state legislators, Oklahoma State Board of Education members and school superintendents upon request.


The questionnaire is accompanied with a self addressed, stamped envelope for your convenience--simply insert the completed information in the envelope provided, seal and mail. Additionally, a self addressed postcard requesting your signature and confirmation of completion is included. Please mail this card independently of, but at the same time the completed information is mailed. This provides for your confidentiality and also allows for the integrity for the population sample to be maintained.

Spaces have been provided in the questionnaire for comments. These comments will be very helpful and are encouraged. Your timely cooperation will be deeply appreciated.

Sincerely,



Steve Hart
Doctoral Student
Oklahoma State University



Gerald R. Bass, Ed.D
Committee Chairman
Oklahoma State University

APPENDIX B

SURVEY

Part I: Demographics

1. Please circle the response which describes the size of your school district by Average Daily Membership:

0-250 251-500 501-1000 1001-3000
 3001-5000 5001-10,000 10,001+

2. Please circle the response which describes the region of your school district as divided by Interstate - 35 (north to south) and Interstate - 40 (west to east):

NW NE SW SE

3. Please circle the response which describes your age bracket:

<30 31-40 41-50 51-60 >60

4. Please indicate your gender:

Female Male

5. Please circle the response which describes the number of years experience as a public school superintendent:

0-3 4-7 8-11 12-15 16+

Part II: Voluntary Consolidation (Circle response)

1. What overall impact do you believe the voluntary annexation or consolidation provisions have had on public education in Oklahoma?

Very positive Somewhat positive No impact Somewhat negative Very negative

2. What impact do you believe the voluntary annexation or consolidation provisions in H.B. 1017 have had on your school district?

Very positive Somewhat positive No impact Somewhat negative Very negative

3. What is your present position relative to the voluntary annexation or consolidation provisions in H.B. 1017.

Very supportive Somewhat supportive Neutral Somewhat opposed Very opposed

4. Has your position changed, in regard to these provisions, since the adoption of 1017?

Much more supportive now Somewhat more supportive now No change Somewhat more opposed now Much more opposed now

5. What factors have caused your position to change?
-

6. As Superintendent, which words presently best describe your view of the voluntary annexation and consolidation provisions of H.B. 1017?

Adopted but not Implemented Initially Implemented but abandoned Implemented but without structural/real change Implemented resulting in structural/real change

7. Please provide any comments you wish in regard to the voluntary annexation or consolidation provisions in H.B. 1017: (Use the back of this paper for additional comments)
-
-

Part III: Career Teacher/Tenure (Circle response)

1. What overall impact do you believe the career teacher/tenure provisions have had on public education in Oklahoma?

Very positive Somewhat positive No impact Somewhat negative Very negative

2. What impact do you believe the career teacher/tenure provisions in H.B. 1017 have had on your school district?

Very positive Somewhat positive No impact Somewhat negative Very negative

3. What is your present position relative to the career teacher/tenure provisions in H.B. 1017.

Very supportive Somewhat supportive Neutral Somewhat opposed Very opposed

4. Has your position changed, in regard to these provisions, since the adoption of 1017?

Much more supportive now Somewhat more supportive now No change Somewhat more opposed now Much more opposed now

5. What factors have caused your position to change?
-
-

6. As Superintendent, which words presently best describe your view of the career teacher/tenure provisions of H.B. 1017?

Adopted but not Implemented Initially Implemented but abandoned Implemented but without structural/real change Implemented resulting in structural/real change

7. Please provide any comments you wish in regard to the career teacher/tenure provisions in H.B. 1017; (Use the back of this paper for additional comments)
-
-

Part IV: Minimum Salary Schedule (Circle Response)

1. What overall impact do you believe the minimum salary schedule provisions have had on public education in Oklahoma?

Very positive Somewhat positive No Impact Somewhat negative Very negative

2. What impact do you believe the minimum salary schedule provisions in H.B. 1017 have had on your school district?

Very positive Somewhat positive No Impact Somewhat negative Very negative

3. What is your present position relative to the minimum salary schedule provisions in H.B. 1017.

Very supportive Somewhat supportive Neutral Somewhat opposed Very opposed

4. Has your position changed, in regard to these provisions, since the adoption of 1017?

Much more supportive now Somewhat more supportive now No change Somewhat more opposed now Much More opposed now

5. What factors have caused your position to change?

6. As Superintendent, which words presently best describe your view of the minimum salary schedule provisions of H.B. 1017?

Adopted but not Implemented Initially Implemented but abandoned Implemented but without structural/real change Implemented resulting in structural/real change

7. Please provide any comments you wish in regard to the minimum salary schedule provisions in H.B. 1017: (Use the back of this paper for additional comments)

Part V: Accreditation Standards (Circle response)

1. What overall impact do you believe the minimum accreditation standards have had on public education in Oklahoma?

Very positive Somewhat positive No impact Somewhat negative Very negative

2. What impact do you believe the minimum accreditation standards in H.B.1017 have had on your school district?

Very positive Somewhat positive No impact Somewhat negative Very negative

3. What is your present position relative to the minimum accreditation standards in H.B. 1017.

Very supportive Somewhat supportive Neutral Somewhat opposed Very opposed

4. Has your position changed, in regard to these provisions, since the adoption of 1017?

Much more supportive now Somewhat more supportive now No change Somewhat more opposed now Much more opposed now

5. What factors have caused your position to change?

-
6. As Superintendent, which words presently best describe your view of the minimum accreditation standards of H.B. 1017?

Adopted but not Implemented Initially Implemented but abandoned Implemented but without structural/real change Implemented resulting in structural/real change

7. Please provide any comments you wish in regard to the minimum accreditation standards in H.B. 1017: (Use the back of this paper for additional comments)
-
-

Part VI: Common School Fund (Circle response)

1. What overall impact do you believe the common school fund provisions have had on public education in Oklahoma?

Very positive Somewhat positive No impact Somewhat negative Very negative

2. What impact do you believe the common school fund provisions in H.B. 1017 have had on your school district?

Very positive Somewhat positive No impact Somewhat negative Very negative

3. What is your present position relative to the common school fund provisions in H.B. 1017.

Very supportive Somewhat supportive Neutral Somewhat opposed Very opposed

4. Has your position changed, in regard to these provisions, since the adoption of 1017?

Much more supportive now Somewhat more supportive now No change Somewhat more opposed now Much more opposed now

5. What factors have caused your position to change?

6. As Superintendent, which words presently best describe your view of the common school fund provisions of H.B. 1017?

Adopted but not Implemented Initially Implemented but abandoned Implemented but without structural/real change Implemented resulting in structural/real change

7. Please provide any comments you wish in regard to the common school fund provisions in H.B. 1017: (Use the back of this paper for additional comments)

Part VII: Oklahoma Curriculum Committee (Circle response)

1. What overall impact do you believe the Oklahoma Curriculum Committee provisions have had on public education in Oklahoma?

Very positive Somewhat positive No impact Somewhat negative Very negative

2. What impact do you believe the Oklahoma Curriculum Committee provisions in H.B. 1017 have had on your school district?

Very positive Somewhat positive No impact Somewhat negative Very negative

3. What is your present position relative to the Oklahoma Curriculum Committee provisions in H.B. 1017.

Very supportive Somewhat supportive Neutral Somewhat opposed Very opposed

4. Has your position changed, in regard to these provisions, since the adoption of 1017?

Much more supportive now Somewhat more supportive now No change Somewhat more opposed now Much more opposed now

5. What factors have caused your position to change?

6. As Superintendent, which words presently best describe your view of the Oklahoma Curriculum Committee provisions of H.B. 1017?

Adopted but not Implemented Initially Implemented but abandoned Implemented but without structural/real change Implemented resulting in structural/real change

7. Please provide any comments you wish in regard to the Oklahoma Curriculum Committee provisions in H.B. 1017; (Use the back of this paper for additional comments)

Part VIII: Class Size Reduction (Circle response)

1. What overall impact do you believe the class size reduction provisions have had on public education in Oklahoma?

Very positive Somewhat positive No impact Somewhat negative Very negative

2. What impact do you believe the class size reduction provisions in H.B. 1017 have had on your school district?

Very positive Somewhat positive No impact Somewhat negative Very negative

3. What is your present position relative to the class size reduction provisions in H.B. 1017.

Very supportive Somewhat supportive Neutral Somewhat opposed Very opposed

4. Has your position changed, in regard to these provisions, since the adoption of 1017?

Much more supportive now Somewhat more supportive now No change Somewhat more opposed now Much more opposed now

5. What factors have caused your position to change?
-
-

6. As Superintendent, which words presently best describe your view of the class size reduction provisions of H.B. 1017?

Adopted but not Implemented Initially Implemented but abandoned Implemented but without structural/real change Implemented resulting in structural/real change

7. Please provide any comments you wish in regard to the class size reduction in H.B. 1017: (Use the back of this paper for additional comments)
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Part IX: Technology (Circle response)

1. What overall impact do you believe the technology provisions have had on public education in Oklahoma?

Very positive Somewhat positive No impact Somewhat negative Very negative

2. What impact do you believe the technology provisions in H.B. 1017 have had on your school district?

Very positive Somewhat positive No impact Somewhat negative Very negative

3. What is your present position relative to the technology provisions in H.B. 1017.

Very supportive Somewhat supportive Neutral Somewhat opposed Very opposed

4. Has your position changed, in regard to these provisions, since the adoption of 1017?

Much more supportive now Somewhat more supportive now No change Somewhat more opposed now Much more opposed now

5. What factors have caused your position to change?
-
-

6. As Superintendent, which words presently best describe your view of the technology provisions of H.B. 1017?

Adopted but not Implemented Initially Implemented but abandoned Implemented but without structural/real change Implemented resulting in structural/real change

7. Please provide any comments you wish in regard to the technology provisions in H.B. 1017: (Use the back of this paper for additional comments)
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Part X: Achievement Scores (Circle response)

1. What overall impact do you believe the achievement score provisions have had on public education in Oklahoma?

Very positive Somewhat positive No impact Somewhat negative Very negative

2. What impact do you believe the achievement score provisions in H.B. 1017 have had on your school district?

Very positive Somewhat positive No impact Somewhat negative Very negative

3. What is your present position relative to the achievement score provisions in H.B. 1017.

Very supportive Somewhat supportive Neutral Somewhat opposed Very opposed

4. Has your position changed, in regard to these provisions, since the adoption of 1017?

Much more supportive now Somewhat more supportive now No change Somewhat more opposed now Much more opposed now

5. What factors have caused your position to change?
-
-

6. As Superintendent, which words presently best describe your view of the achievement score provisions of H.B. 1017?

Adopted but not Implemented Initially Implemented but abandoned Implemented but without structural/real change Implemented resulting in structural/real change

7. Please provide any comments you wish in regard to the achievement score provisions in H.B. 1017: (Use the back of this paper for additional comments)
-
-

Part XI: Facility Needs (Circle response)

1. What overall impact do you believe the facility needs provisions have had on public education in Oklahoma?

Very positive Somewhat positive No impact Somewhat negative Very negative

2. What impact do you believe the facility needs provisions in H.B. 1017 have had on your school district?

Very positive Somewhat positive No impact Somewhat negative Very negative

3. What is your present position relative to the facility needs provisions in H.B. 1017.

Very supportive Somewhat supportive Neutral Somewhat opposed Very opposed

4. Has your position changed, in regard to these provisions, since the adoption of 1017?

Much more supportive now Somewhat more supportive now No change Somewhat more opposed now Much more opposed now

5. What factors have caused your position to change?
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-

6. As Superintendent, which words presently best describe your view of the facility needs provisions of H.B. 1017?

Adopted but not Implemented Initially Implemented but abandoned Implemented but without structural/real change Implemented resulting in structural/real change

7. Please provide any comments you wish in regard to the facility needs provisions in H.B. 1017; (Use the back of this paper for additional comments)
-
-

Part XII: Community Involvement (Circle response)

1. What overall impact do you believe the community involvement provisions have had on public education in Oklahoma?

Very positive Somewhat positive No impact Somewhat negative Very negative

2. What impact do you believe the community involvement provisions in H.B. 1017 have had on your school district?

Very positive Somewhat positive No impact Somewhat negative Very negative

3. What is your present position relative to the community involvement provisions in H.B. 1017.

Very supportive Somewhat supportive Neutral Somewhat opposed Very opposed

4. Has your position changed, in regard to these provisions, since the adoption of 1017?

Much more supportive now Somewhat more supportive now No change Somewhat more opposed now Much more opposed now

5. What factors have caused your position to change?

6. As Superintendent, which words presently best describe your view of the community involvement provisions of H.B. 1017?

Adopted but not Implemented Initially Implemented but abandoned Implemented but without structural/real change Implemented resulting in structural/real change

7. Please provide any comments you wish in regard to the community involvement provisions in H.B. 1017: (Use the back of this paper for additional comments)

Part XIII: Elementary Foreign Language (Circle response)

1. What overall impact do you believe the elementary foreign language provisions have had on public education in Oklahoma?

Very positive Somewhat positive No impact Somewhat negative Very negative

2. What impact do you believe the elementary foreign language provisions in H.B. 1017 have had on your school district?

Very positive Somewhat positive No impact Somewhat negative Very negative

3. What is your present position relative to the elementary foreign language provisions in H.B. 1017.

Very supportive Somewhat supportive Neutral Somewhat opposed Very opposed

4. Has your position changed, in regard to these provisions, since the adoption of 1017?

Much more supportive now Somewhat more supportive now No change Somewhat more opposed now Much more opposed now

5. What factors have caused your position to change?
-
-

6. As Superintendent, which words presently best describe your view of the elementary foreign language provisions of H.B. 1017?

Adopted but not Implemented Initially Implemented but abandoned Implemented but without structural/real change Implemented resulting in structural/real change

7. Please provide any comments you wish in regard to the elementary foreign language provisions in H.B. 1017. (Use the back of this paper for additional comments)
-
-

APPENDIX C

RETURN CARDS

Please mail separately upon completion and
and return of questionnaire.

Thank you for your Help!



Dr. John Q Superintendent
Superintendent of Schools
Anywhere Public Schools
123 Street
Anywhere, Oklahoma 12345

March 17, 1995

Dear Superintendent:

By now, you should have received a questionnaire on the topic of House Bill 1017. This information is essential for research efforts at Oklahoma State University. Your opinion is not only valuable, but also central to this study. If you have not responded to the questionnaire, please help by taking a few minutes to do so. Thank you for your timely cooperation and assistance.

Sincerely,

Steve Hart
Doctoral Student
Oklahoma State University

APPENDIX D

COMMENTS

This appendix provides voluntary responses written by superintendents on the lower portion of the survey instrument. The design of the questionnaire was intended to allow greater clarity of superintendents thoughts regarding the reform issues. The questionnaire asked superintendents to first, list whatever factors caused a change in the degree of support on the reform issue and second, provide any desired comments on the question listed.

When asked "what factors have caused your position to change"? in regard to voluntary consolidation, superintendents responded in the following statements.

1. I believe fewer schools are meeting the standards and will eventually be forced to close.
2. Reality! Improved educational opportunities for thousands of kids!
3. Fewer schools improves image of state. Fewer schools will improve production at State Dept. of Educ.
4. Legislation appears to be headed toward consolidation whether we want it or not.
5. The fact that it is voluntary.
6. I think district of 350 to 500 students are going to be annexed. Some of these are good schools.
7. What little consolidation/annexation has occurred is due to demographics not legislation.
8. The money that come with it as well as the positives of better curriculum available after consolidation.
9. Realization that school districts must consolidate to stretch the dollar to provide the best educational selection of courses.

The second part of the questionnaire asked superintendents to "please provide any comments you wish in regard to voluntary consolidation."

1. A worthwhile concept seemingly but for the discontent it has caused.
2. Financial incentives need to be re-newed and improved.
3. "Voluntary" is the key word! At times it does not appear voluntary but mandated in disguise.
4. Need to simplify process. Reinstate/increase funding to get more consolidation.
5. The loss of smaller schools, although viewed by many as a money saving idea, causes the loss of some of the best educational opportunities available to our children. If many of the arbitrary and unnecessary curriculum requirements were relaxed, the small school concept would be more workable. Larger numbers of students with larger choices of curriculum do not necessarily mean a better education. The homey, friendly, supportive atmosphere of a smaller school are often more important to the students than a large number of diverse credits on a transcript.
6. Dependent districts should be given an option to become a K-12 system or consolidate.
7. Voluntary - OK. Mandatory - Never!
8. Voluntary annexation and consolidation is good only to the extent that "perception" of the people believe it to be good!
9. Should be done very cautiously.
10. Probably abandoned due to lack of funding.
11. The Legislature did not provide adequate \$'s into program.
12. If you want it to work - do away with isolation money.
13. Does not address a school of our size.
14. Although only a handful of schools took advantage of the provision when money was available, it did start the smaller schools thinking about the advantages. Having served as supt. of districts both small and large, I am a firm believer in large administrative units.

15. It is my belief that consolidation of this district and a neighboring district will occur in 6 years or less. We are currently sharing teachers where possible and combining classes/sports which we (two superintendents) feel we can do so in a totally positive manner. This sets the stage for eventual voluntary consolidation to occur without great antagonism.
16. Annexation funds should be made available again - It is expensive to be involved.
17. I question whether it was voluntary. I feel it was a forced consolidation effort on behalf of the legislature.
18. It did not change the pace of the trend to consolidate. Schools continued to hold out until the bitter end.
19. Voluntary annexation was possible before 1017.
20. Fully abandoned!
21. When it is voluntary and in the best interest of the affected districts, it will eventually happen!
22. I believe students have increased educational opportunities when resources are combined.
23. It appears to many that this is a way to close schools without placing blame on the legislators.
24. There are far too many school districts in Oklahoma. HB 1017 has not gone far enough. Until the legislature has the "guts" to do serious consolidation, we will all suffer from lack of funding.

When asked "what factors have caused your position to change?" in regard to career teacher/tenure, superintendents responded in the following statements.

1. Minimal personal problems. Positive impact on teacher morale.
2. Teachers are more accountable.
3. If you want real educational reform - do away with tenure!! It is not a threat to good teachers and it is a 1017 joke!
4. Difficult legal battles to dismiss incompetent teachers.

5. Inadequate funding.
6. Expanding list of reasons for dismissal.

The second part of the questionnaire asked superintendents to "please provide any comments you wish in regard to career teacher/tenure."

1. Limits true evaluation - restricts removal of poor teachers.
2. There is very little "real" change----There needs to be some loosening of the reasons for non renewal.
3. Public will never support tenure in any form.
4. It is very difficult to dismiss a poor teacher. The cost to the school district is so prohibitive that we will often keep a bad teacher rather than incur the expense of seeking dismissal. The students are the ones we should be protecting, not the poor teachers.
5. Tenure is the key word above - length of service does not make a "career" teacher.
6. Tenure was strengthened by 1017 not weakened! It protects bad teachers - your choices are to run a bluff and hope the teacher resigns or spend valuable resources in district court and hope you win.
7. Tenure has little to do with a good teacher however, protect bad ones. I see little difference in tenured and non-tenured teachers status...
8. Effective teaching is always recognized as a positive renewal factor. Poor teaching is always the reason for evaluation. A poor teacher can always be dismissed if the principal is effective in completing his/her evaluations. This wasn't changed under HB 1017. The name was changed, one step dropped from the teacher dismissal process but it all begins with the teacher directly and objectively being observed and evaluated.
9. Teacher tenure has caused the master teacher more problems. It protects the average or below average teacher.
10. It is very difficult to dismiss a career teacher. HB 1017 made no real change. Again, the Legislature does not have the "guts" to do what really needs to be done.

11. Tenure and the process to remove unacceptable teachers from the classroom is so much a hassle for administration and boards that they rarely try.
12. Career teachers have not been rewarded as promised.
13. It is still too difficult to remove tenured employees.

When asked "what factors have caused your position to change?" in regard to minimum salary schedule, superintendents responded in the following statements.

1. Underfunded!
2. Teachers feel they are on a more level scale with other teachers with similar education and experience.
3. The funding was "never" provided.
4. Mandated raises without full state funding. 1st 3 years of raises, had to RIF teachers to give raise.
5. The 1017 provisions seem to have established some groundwork for the future.
6. The image Okla. is sending to other states, we are for Ed.
7. Improved attitude of teachers. The public thinks teachers make....
8. I see that small schools can now compete for teachers because of salary.
9. Strain on local budget. Mandates leave no room for local control.
10. Salary schedules have been compressed. Thought it would happen, but more pronounced than I thought.
11. Career teacher's salaries were increased through 15 years, but the 15+ years experience needs to be addressed.
12. More of a positive impact on our school.
13. My good career teachers feel like they have been slapped in the face because experience is minus and not a positive.

14. Drop the scale and keep the starting point. Most schools are negotiating anyway.
15. Salaries were raised without adequate funding to districts (districts had to fund increased social security, insurance and teacher retirement, etc.).
16. Legislature needs to fully fund salary increases.
17. Funds to pay salary schedule!
18. More talented people in our profession...
19. Was not funded.
20. Salaries in Oklahoma needed to be raised.
21. This school district did not receive any new money.
22. This was known to be an unfunded mandate from the start!
23. Salary increases were needed but should be provided by the state and should not rely on local monies.
24. Teachers are working harder to earn the salary increases.

The second part of the questionnaire asked superintendents to "please provide any comments you wish in regard to minimum salary schedule."

1. Minimum salary schedules were great for staff, but as expected with passage of 1017, the mandates were not fully funded leaving many budgets in severe stress.
2. Salary schedule has rewarded 1st year teachers at expense of career teacher - has cost schools above funding.
3. Not funded!
4. High experience needs addressed appropriately.
5. Only a small step in the right direction.
6. Scale is OK! Funding to support the scale is not! Career teacher has been sold down the river.
7. The career teachers got the "shaft"! Sad, but true-The younger teachers needed the increase-possibly more than the career teachers.

8. Never fully funded/Declining enrollment districts will face a challenge to pay.
9. Long term teachers have felt left out and neglected. Lowered morale for them.
10. Beginning salaries are equal in large as well as small schools - Small schools can recruit needed specialized teachers.
11. Evidently we want teachers to leave the profession and hire only less experienced teachers.
12. Why do we have dictated scales as we negotiate?
13. It raised minimum salaries on lower steps but didn't address career teachers. It narrowed the gap negating incentive.
14. A teacher's salary is usually relative to the area's cost of living. Our state minimum salary schedule is what it is stated, "minimum."
15. Better teachers are not hired. Most districts hire local teachers, not the best.
16. Provisions are successful but long term career teachers somewhat discouraged over salary.
17. Career teachers need a raise.
18. The salary scale is the best part of HB 1017 - However, it is going to become a massive problem if it is not adequately funded.
19. Compliance with minimum salary and State and Federal mandates is very difficult for small districts having small tax base or valuation.
20. Has not been funded!

When asked "what factors have caused your position to change?" in regard to accreditation standards, superintendents responded in the following statements.

1. A more realistic interpretation of some of the requirements by the State Department.
2. Lack of enforcement!

3. Improved curriculum.
4. I see small schools offering courses (because of 1017) that they wouldn't otherwise.
5. Unfunded mandates such as 120 class size load 1996-1997.
6. Mandated increases for additional libraries and counselors not funded.
7. We were North Central before - so most things were in place.
8. A study of those standards needs to be made and revisions of those that remain unfunded - class size.
9. Required mandates without funding.
10. Once again, the requirements or mandates are not funded.
11. The laws were mandated but the money for implementation was not forthcoming.
12. Getting parents and students to focus on outcomes and improving student attitudes towards education.
13. In general, public schools are doing a better job.

The second part of the questionnaire asked superintendents to "please provide any comments you wish in regard to accreditation standards."

1. Many of the minimum standards are necessary but place districts in tough situations while trying to meet the mandates.
2. I do not believe they are enforced. If they were enforced and checked, there would be more closures.
3. Good changes - NEED MONEY!
4. Consistent enforcement must accompany these standards or they will turn into accreditation "suggestions!"
5. Funding is the only negative item for additional programs and staff.
6. All schools meet the same standards-The smaller schools do not need the same library, music, etc. standards the larger schools do.

7. We were already doing the standards.
8. The State Department of Education has done a very good job of implementing accreditation standards - with understanding and assistance.
9. Mandated but not funded items within 1017.
10. Special interest groups - Fine Arts - have gotten some additional requirements added through the SDE - State Board. these requirements were not mandated by law.
11. Scrap fine arts and non core requirements - leave those to North Central.
12. Many of the changes require only more paperwork - due to decreased staff at the SDE, monitoring becomes only questions to verify the paperwork was done.
13. Every school should offer a fine arts choice, foreign language, and high level courses. If not so, consolidation should be strongly considered.
14. Need consistent standards that are simple and basic. They change so much that I am not sure what they are at the current time.
15. A couple of standards need to be studied - 120 class size - culture and the arts.
16. This district has been forced to reduce staff from 32.5 in 1990 to 23 in 1995.
17. The accreditation standards do not focus on quality, but on quantitative measures. They are "bean counter" standards which is what the RAO's understand. There is no focus on quality or accountability.
18. For the first time we have finally said what it is we expect students to know!

When asked "what factors have caused your position to change?" in regard to common school fund, superintendents responded in the following statements.

1. Funding inadequate to supply necessary salary increases and mandates.
2. SQ 669

3. More unfunded or underfunded mandates.
4. Because of ADA, \$'s have decreased each year while teacher salary has increased. No new \$'s to cover.
5. Removal from "hold Harmless" over all increase in state aid.
6. Improper funding.
7. We experienced growth which was to our advantage.
8. Inadequate funding for provisions.
9. Mandates were made, but money for implementation did not follow.
10. Lack of funding.

The second part of the questionnaire asked superintendents to "please provide any comments you wish in regard to common school fund."

1. Created a loss of state aid.
2. In Oklahoma, patrons think small dollars are large.
3. Funding for mandates has not been accomplished and the financial condition of this district is somewhat strained.
4. Without additional funds the salary increases could never have been implemented, but sufficient monies have not been allocated for all areas that must be implemented.
5. Mandates must be fully funded. Local funds are constitutionally limited so we must steal from current funds to pay for new mandates.
6. Small schools are saved by isolation money. Large schools are saved by ADM as opposed to ADA. Medium schools suffer because they get neither and are the schools who absorb annexed or consolidated schools.
7. Change continues without funding. Class size reductions and technology are just two of many areas of concern.

8. I would resist the philosophy that all monies should flow through the common fund. State dedicated revenues originate at the local level and should not be relegated to the common fund.
9. Local revenue should stay local.
10. This district is a hold harmless school. HB 1017 funding negatively impacted our school.
11. While generous progress has been made under HB 1017, funding is still woefully inadequate and it won't improve in the near future.
12. If enacted, I believe a change in funding formula would be necessary.

When asked "what factors have caused your position to change?" in regard to Oklahoma Curriculum Committee, superintendents responded in the following statements.

1. Somewhat out of touch with the real needs of our students.
2. Ivory Tower.
3. The vocal (which may not represent the majority) patrons have caused superintendents and boards a great deal of lost time.
4. I was on the curriculum committee and the process was too political. The work of the committee (months) was essentially discarded and the P.A.S.S. requirements substituted.
5. If the Oklahoma Curriculum Committee provisions are followed through, Ok! We have been through so many "restructures" that were soon abandoned, too many people question validity and credibility.
6. Teachers are working to perform at a higher level.

The second part of the questionnaire asked superintendents to "please provide any comments you wish in regard to Oklahoma Curriculum Committee."

1. Some provisions have caused monetary expenditures that have resulted in a slower pace for this district in upgrading technology based instructional methods.
2. Some curriculum does not apply to all school districts.
3. Requires accountability!
4. The committee does not focus on what is the real need in Ed.
5. Justification for increased funding.
6. Concentrate on Core Curriculum!! Leave elective courses out of accreditation.
7. Some of the requirements must be revisited (Arts in Education) and brought back to reality.
8. The requirements have helped our teachers focus on the skills required.
9. This group has accomplished absolutely nothing!
10. Recommendation that all students be able to matriculate to compulsive graduate institutions without taking secondary level courses is not realistic - nor possible with current attitudes of students and parents toward preparation (academic) in high school (Some - not all). There are no "hammers" to make some kids "try" or stay in school to be prepared.

When asked "what factors have caused your position to change?" in regard to class size reduction, superintendents responded in the following statements.

1. With \$'s.
2. No flexibility - Need wiggle room to get size down - Class Size needs to be research based, not just one number.

3. Impact of secondary class size will be negative.
4. When implemented, I was an elementary principal. I am now a Superintendent and must figure out a way to pay for them.
5. I believe that small class sizes at the K-6 level is important - I don't believe that 120 max is going to help the H.S.
6. Budget cannot afford class size mandates. Growing too fast to conform.
7. 1-20 is good. 1 - 120 is not feasible!
8. No supportive data used to set class sizes. Withholding state aid for oversized classes.
9. Better education and instruction!
10. Secondary class size and its reality. The rigidity of 140 and no flexibility is near impossible and 120 will destroy many without funding.
11. I was very much in favor - However, the funding was not commensurate with the costs.
12. Unfunded mandate!
13. Class size to change to 140 is not realistic.
14. This provision is positive for instruction but has been unfunded causing many schools to cut other programs and services.
15. Increased financial burden!
16. Not compliance in larger districts.

The second part of the questionnaire asked superintendents to "please provide any comments you wish in regard to class size reduction."

1. Reduction levels especially at the lower levels, are much too stringent with no areas of flexibility.
2. A very good concept!

3. Positive in elementary! Jr. High and Middle School must be impacted to improve secondary education!
4. 140 students count in H.S. dropping to 120 is not realistic--Again, mandates without funding.
5. Need more flexibility.
6. I have concerns about secondary class size (1-120) and possible penalty on a district for not meeting the ratio.
7. Another unfunded mandate that seems to be a tool to force consolidation.
8. Mandated but not funded.
9. Excellent at Elementary levels. Little positive effect at High School level.
10. We had to cut elementary electives to reach class size, but it was worth it! Great for elementary - but 120 is not feasible for secondary.
11. We must restudy the reality of 140 without exceptions and look carefully at the future of the 120.
12. The elementary class sizes are realistic but the 120 per teacher in secondary aren't. We cannot meet this mandate without funding.
13. High School class size mandates need to be abandoned.
14. 120 class size - secondary level - not necessary...
15. We cannot exist with the 120 mandate!
16. Did not provide funding.
17. Our school was one student over and got a penalty. Actually it was .5 penalty. Need more flexibility in using teacher assistants.
18. Class sizes mean nothing until they are reduced to 18 or less. The law is currently not flexible enough to meet the needs of fast growth districts.
19. \$'s for class size reduction not in the Bill. Research on class size reduction says that one must get to pupil/teacher ratios of 15:1 before you see changes in learner outcomes. Was ignored. Not flexible enough to allow for slight variations. Secondary class size is Killer!

20. I feel that 1-20 ratio in elementary school should be changed to a 1 to 25 ratio and if you want the ratio, then pay for it.
21. Very helpful from an instruction perspective.
22. We can't live with the 120 students/teacher.

When asked "what factors have caused your position to change?" in regard to technology, superintendents responded in the following statements.

1. More knowledge about technology available to schools.
2. More progressive attitude statewide.
3. I am more knowledgeable of the role of technology now than I was before.
4. Not enough money left after hiring teachers, librarians, counselors, etc.
5. No funds have come to pay for needed hardware, etc.
6. Funding.
7. Oklahoma had a long way to come and need to go ahead.
8. This is an area that must be addressed.
9. My opinion is that a further advancement of technology ed in the public school would only duplicate services of area vo tech schools.

The second part of the questionnaire asked superintendents to "please provide any comments you wish in regard to technology."

1. This district was making greater strides in technology prior to 1017. Extra monies has since been used to cover unfunded mandates such as salary increases, etc. Technology development has slowed considerably.
2. Must keep up!
3. Not adequately funded!!! It was only lip service.
4. Requires fiscal accountability, consistency and honesty.

5. Technology is continually changing--We (Public Education) must remain "on top of" technology in the classroom.
6. We need to infuse technology into the curriculum - Lack of funds - Bond issue that can reach only 59% - Continued funding problems.
7. Room and funding are limited.
8. Too many financial mandates which have limited technology advances.
9. Technology was not funded - all of our funds had to go to the mandated teacher raises.
10. Technology is our future, but without future funding, school cannot gain what is possible without technology.
11. No money!
12. Need Funds!
13. To little, too late. No real money was committed to technology except for various small grants.
14. Due to the expense of equipment, its effects will be slowly felt.

When asked "what factors have caused your position to change?" in regard to achievement scores, superintendents responded in the following statements.

1. Teachers seem to be more motivated in preparing students for testing.
2. Achievement scores are good indicators of economic status but not much else.
3. Testing is "Messed Up." Quit comparing everyone by district.
4. The lack of leadership in SDE concerning the implementation.
5. Achievement score provisions were not for educational purposes, but for political acceptance.

6. This is used for many reasons except to improve the students education.
7. Too much emphasis on tests.
8. Test scores are still only part of the total educ. picture but media looks at scores as all encompassing quality.
9. Achievement scores are now used to measure one district against another.
10. Education is not a game of test! test! test! It is a game of teach! teach! teach!
11. Again, we have had to reduce the number of teachers because of salary mandates.
12. Testing students more intensively frequently does not make them any smarter!

The second part of the questionnaire asked superintendents to "please provide any comments you wish in regard to achievement scores."

1. Sometimes are used for the wrong reasons!
2. Achievement scores overrated. Not relative.
3. Provides a form of understandability to parents and the public for whom we work.
4. The total testing program is out of control.
5. Why change the achievement test? How can student progress really be measured with the CRT?
6. Test taking does not truly measure learning. It only measures test taking ability on that one day!
7. Still comparing school "A" to school "B" - not all think that schools should be compared.
8. The placing of importance on test scores has brought about a very positive changes in teaching (they make us accountable) with very little paperwork (busywork) involved. There are some flaws. However, emphasis on test scores has put more teachers and students to work than any other single item in many years.

9. Scores used as a comparison rather than achievement in respect to student population of each particular school.
10. Stupid!
11. CRT testing means reforming teaching styles - We have received no support for those efforts. Every time we try to change old teacher styles - we are hit in the face with the OBE myth. Our throat has been cut by the SDE.
12. The timing of results (middle of summer) does not allow time to implement needed changes. What will the results tell us?
13. I am opposed to achievement scores to compare children and school districts.
14. Our students scores did not change much. We had a class or two improve, but a couple of classes decreased their scores.
15. It is really hard to say what kind of impact the testing program will have.
16. What are you talking about?
17. Testing should be implemented but only as a basis for improvement of local schools.
18. A dismal failure.
19. Achievement Test Scores have been used in an incorrect manner as we all feared!

When asked "what factors have caused your position to change?" in regard to facility needs, superintendents responded in the following statements.

1. Wasted effort on reporting. Every supt. and board knows their needs. Provisions did not amount to anything.
2. HB 1189
3. However, my community blames HB 1017 for doing what was needed for classroom space, i.e., bond issue.
4. Mandates from the state without funds.

5. It is difficult to get excited about improving facilities without adequate funds.

The second part of the questionnaire asked superintendents to "please provide any comments you wish in regard to facility needs."

1. Facilities are a concern and are handled at local level. 1017 has not changed what was already occurring with facility management across the state except in growing districts who have had to add facilities because of class size reduction.
2. There was no funding to schools that had larger needs.
3. Building funds are not equitable.
4. Status Quo in any area means you are falling behind! Libraries are more important than new gyms!
5. Where's the support?
6. People said they couldn't afford to build libraries, etc., but they did! Very helpful item.
7. Facility needs have always been there...
8. I am supportive of the facility needs, but I have no room and we are crippled without new and additional space. We are trying a bond issue, but we have not been successful in 5 tries in 16 years.
9. Further class size reductions may push the school's public over the edge.
10. Have very little money to provide classrooms to meet class size mandates.
11. Do not see results.
12. HB 1017 has not funded facility needs!
13. Our enrollment has decreased some, but this year is on the increase.
14. What facility needs provision? All we received on our facilities is a report to do. Absolutely no help with them.
15. Waste of time and paper because there is no \$'s to back up needs.

16. How can unfunded mandates be implemented? Many schools are just trying to keep the doors open.

When asked "what factors have caused your position to change?" in regard to community involvement, superintendents responded in the following statements.

1. Involving community reaps many positive benefits.
2. The parents of our students need to be involved in school at every step.
3. We have had community involvement strategies for many many years - 1017 didn't start this.
4. Invites too many people with personal hang-ups rather than positive input because "the law says."
5. I dislike the SDE and legislature mandating the methods and all of the additional committees.
6. Positive oriented parents who work with the system to provide student rewards.
7. If public schools are to survive, this must be continued to be encouraged.

The second part of the questionnaire asked superintendents to "please provide any comments you wish in regard to community involvement."

1. Opens communication; Breaks down barriers; Brings fresh ideas and better understanding of our role!
2. Smaller school systems (usually) have very good community involvement--Basically all employees know all students and all parents--
3. Had parental involvement prior to 1017. 1017 did not change that.
4. Community involvement is not one of the more important aspects of 1017. It has had some positive results, but I believe its value may be overrated. Natural community involvement is very good; forced community involvement is not worth the effort it takes to implement - phony.

5. The main impact is that our school facilities are much more widely used.
6. Maybe in a negative direction.
7. Many parents still have an interest in the process. We all are frustrated by these!

When asked "what factors have caused your position to change?" in regard to elementary foreign language, superintendents responded in the following statements.

1. I have seen the positive influence of the program.
2. The additional costs plus the requirements of universities for so much foreign language.
3. By observing our elementary students - the excitement of the students--
4. Another unfunded mandate. It is also difficult to know exactly what is expected.
5. Expands our awareness beyond rural OK - a good awareness.
6. Cannot afford mandates. Teachers and training not available.
7. State laws and SDE regulations that are mandated and not funded.
8. Not sure of the results.
9. The requirements came! Funding did not!
10. I have seen interest being sparked in the elementary children which has to promote better performance later on!

The second part of the questionnaire asked superintendents to "please provide any comments you wish in regard to elementary foreign language."

1. Opens minds to other cultures; Races; Beliefs etc. Hopefully will eventually impact Racism!

2. We planned to implement Spanish into our elementary curriculum prior to HB 1017--
3. Many districts are reported to be addressing elem. foreign language at a minimum level--
4. Another wasted provision - Obviously won't be enough trained personnel available.
5. A good and positive part.
6. A very good part of 1017. In 30+ years in public school teaching and administration, HB 1017 has brought about more positive good for the students of our state than all the other reforms of the past 30+ years put together! Lots of positive results have been brought about with a minimum of paperwork and busy work. Accountability was a bunch of paperwork with no measurable positive results whatsoever. Most past reforms have been the same - lots of work, sometimes even negative results.
7. Not needed @ elementary level.
8. It is another unfunded mandate that keeps my elementary teachers from reading, writing, and math. Middle school program would be early enough.
9. Funding continues to be a real problem.
10. Mandating a provision without the availability of teachers makes no sense. This is an example of the political clout of the interest group.
11. Takes away from core subjects.
12. Many districts have found a way to avoid effectively implementing this requirement.
13. Again, not enough \$'s to really do it right and make a difference. Elementary teachers already have their cup full and this not only adds to it, it takes away time from areas I believe are more important for elementary students.

APPENDIX E

SUMMARY OF HB 1017

BILL SUMMARY

MEASURE: Conference Committee Substitute for HB 1017
AUTHORS: Representatives Lewis et al; Senator Cullison et al
SUBJECT: Common Education Reform
PROVISIONS:

ACCREDITATION

- SECTION 1:** New law stating legislative intent that taxpayers should be guaranteed that schooling in the state's public schools is provided in an efficient manner and that school districts shall comply with standards, within the limits of resources available. State accreditation shall be denied or withdrawn from schools which do not meet the accreditation, minimum salary, curriculum, and class size standards established in this act. (Effective: July 1, 1990)
- SECTION 2:** New law requiring the State Board of Education to adopt accreditation standards by February 1, 1991, for public schools. The standards shall be implemented with the 1993-94 school year, but school districts shall not lose or be denied accreditation solely for failure to meet the standards prior to the 1997-98 school year. Such standards shall meet North Central Association of Colleges and Schools to the extent that these standards are consistent with an outcome-oriented approach to accreditation and to the extent that these standards do not conflict with state statute. The standards shall include standards for school counselors. High schools shall meet standards by June 30, 1995, and all other levels by June 30, 1999. If one or more school sites in a district fails to meet the standards by the dates set, the State Board shall close the school and reassign students to an accredited school in the district or annex the district to one or more districts so that the children can be educated in accredited schools. The State Board is directed to provide accreditation rules for warning and assistance to districts in danger of losing accreditation. The Board shall also provide assistance to districts which are considering meeting accreditation standards through the use of nontraditional means of instruction.

CURRICULUM

- SECTION 3:** Amends 70 O.S., Section 11-103 consistent with changes in instructional standards in previous section. Requires each district to submit its annual curriculum evaluation to the State Board of Education after July 1, 1990, which will use them for its periodic evaluation of curriculum. The evaluation shall be made available to the Oklahoma Curriculum Committee.
- SECTION 4:** New law creating the 22-member Oklahoma Curriculum Committee until July 1, 1992. The members include the Secretary of Education, State Superintendent of Public Instruction, the Chancellor, the director of the Department of Vocational Education or their designees, and two members with expertise in curriculum appointed by the President Pro Tempore of the Senate, two members appointed by the House Speaker who are elementary education teachers, two who are school administrators, two who are junior high or middle school teachers appointed by the House Speaker, four high school teachers who are appointed by the Governor, two members appointed by the Governor from higher education with expertise in curriculum, and two lay persons appointed by the Governor, and two members of Task Force 2000 appointed by the chairman of Task Force 2000. The committee elects a chair, vice-chair, and secretary.
- SECTION 5:** New law providing for the duties and responsibilities of the Oklahoma Curriculum Committee. The committee shall make its recommendations to the State Board of Education by November 1, 1990, and assist the Board in implementation of curriculum reforms to the extent that the Board requests. The committee would be required to:

determine and prescribe desired levels of competencies for students in the public schools; determine the core curriculum needed to support effective instruction of each competency; determine the curriculum needed to provide the opportunity for every student to become proficient in the use of computer technology; delineate which activities shall be designated as extracurricular; review the future role of the State Textbook Committee and the state-recommended textbook list; investigate more efficient means for integrating nonacademic material; and provide for the teaching of a hands-on career exploration program for students in grades 6-10. The curriculum standards must be at least equivalent to those of the North Central Association of Schools to the extent that such standards are consistent with an outcome-oriented approach to accreditation. The committee's curriculum recommendations for high schools shall ensure that all high school students must have access to course offerings that would permit them entrance at one of the two comprehensive universities without having to enroll in remediation courses at the university.

- SECTION 6:** New law requiring adoption by the State Board of Education of a statewide core curriculum by February 1, 1991, to be implemented by the 1993-94 school year. The core curriculum shall ensure attainment of desired levels of competency in a variety of areas, including language, social sciences, and communication. All students must gain literacy at the elementary and secondary levels through the core curriculum. The core curriculum shall require students to study their own and other cultures through the social sciences, literature, languages, arts, and math and science. The core curriculum shall also be designed to teach the competencies necessary to prepare students for the twelfth grade testing required by law and for employment or post secondary education. The core curriculum shall provide students a hands-on career exploration in cooperation with the vo-tech schools. The State Board of Education shall provide an option for high school graduation based upon attainment of desired levels of competencies in lieu of an amount of course credits earned and shall adopt a promotion system based upon attainment of specified levels of competencies in each area of core curriculum. Students who have individualized treatment plans in accordance with P.L. 94-142 shall be exempt from the promotion plan.
- SECTION 7:** New law requiring the State Board of Education to review the new curriculum every three years and make such changes necessary to improve the quality of education.

CONSOLIDATION/ANNEXATION

- SECTION 8:** Amends 70 O.S. Section 7-201 by renaming the Oklahoma Voluntary School Consolidation Act to the Oklahoma School Consolidation and Annexation Act. (Effective: July 1, 1990)
- SECTION 9:** Amends 70 O.S., Section 7-202 by making the provisions of the Oklahoma School Consolidation and Annexation Act applicable only to contiguous school districts annexed or consolidated. (Effective: July 1, 1990)
- SECTION 10:** Amends 70 O.S., Section 7-203 the School Consolidation Assistance Fund, to allow school personnel who lose employment due to annexation or consolidation to be paid up to 80% of salary, excluding fringe benefits, in the form of a severance pay. Persons receiving such severance pay shall be credited with one year of service for retirement purposes. Restricts the State Board of Education from allocating funds from the Consolidation Fund to districts which have failed to announce their intent to consolidate or annex by July 1, 1991. If more than 250 boards announce their intent before that date, allocations will be made for the first 250 boards. Financial incentives are provided for consolidations involving two or more districts as follows: Each district may count only up to 500 A.D.M. for purposes of allocations from this fund. The combined A.D.M. is then multiplied by: \$500 for two districts; \$600 for three districts; \$700 for four districts; and \$800 for five or more districts. If there are insufficient funds for all qualified school districts, allocations will be made based on date of application. (Effective: July 1, 1990)

- SECTION 11:** New law providing that dependent school districts which desire to consolidate with independent districts in the transportation district of their choice shall be allowed to enter into contracts with the independent district(s) for a three-year moratorium on school site closings in the consolidated or annexed dependent school district. (Effective: July 1, 1990)
- SECTION 12:** New law authorizing the State Board of Education to promulgate rules for mandatory annexations of school districts. Allows the affected school district to appeal an annexation to the Board within 15 days of receiving written notice from the Board. Failure to do so means the Board can proceed without further notice. Directs the Board to make a determination on an appeal after hearing from the Department of Education and the school district.
- SECTION 13:** Requires all boards of education not filing a notification of intent to consolidate or annex by November 1, 1990, to submit to the State Board of Education a Plan of Educational Development and Improvement by May 1, 1991. The plan shall be developed in accordance with rules promulgated by the State Board of Education by April 1, 1990. The rules shall, to the extent possible, be consistent with the material used to submit the districts' four-year plans required by law. The Board has three months to review the districts' plans. If a plan is rejected, the Board shall assist the district in revising the plan or reconsidering the decision not to file the notice of intent to annex or consolidate. Approval by the Board means that it has no reasonable doubt that the district can achieve full compliance with this act.

KINDERGARTEN/EARLY CHILDHOOD EDUCATION

- SECTION 14:** Amends 70 O.S., Section 10-105 by revising the compulsory school age-range requirement to 5 to 18 years of age (current is over 7 and under 18 or the child has parental and school permission to leave school at age 16), beginning with the 1991-92 school year, unless the child has been screened and determined not ready for kindergarten requires attendance of one-half day kindergarten. A kindergarten program shall be directed to developmentally appropriate objectives. Allows school districts to excuse students for observing religious holy days at the request of parents or guardians. Requires new teachers hired after January 1, 1993, to have early childhood education certificates, and those hired before January 1, 1993 to have the certification by the 1996-97 school year.
- SECTION 15:** Amends 70 O.S., Section 1-114 to allow all four-year-old children to attend an early childhood program starting with the 1990-91 school year who have not attended a public school kindergarten. Children who meet qualifications commensurate with Head Start shall be given priority. Other children will be charged on the basis of a sliding scale set by local boards.
- SECTION 16:** Amends 70 O.S., Section 11-103.7 to require the Department of Education to develop an early childhood education program by July 1, 1990, for children who are four years old, as of September 1 of the ensuing school year. Starting with the 1990-91 school year, districts may offer four-year-old programs. The program will not be directed to academic achievement, but towards developmentally appropriate objectives for that age group. The program shall supplement the Head Start program and be available to all children without regard to socio-economic conditions of the child or family. Teachers employed after January 1, 1993, shall be certified in early childhood education; those employed before shall be certified by the 1996-97 school year. School districts are permitted, but not required, to offer the program, with the following options: within the district, in cooperation with other districts, or by contracting with private or public providers meeting State Board of Education standards.
- SECTION 17:** New law requiring public schools to use increased state funding for new technology and innovation, including management and reporting practices, as well as instruction.

EXTENDED SCHOOL-YEAR PROGRAM

- SECTION 18:** New law giving school districts the option of establishing an extended school year consisting of either eleven or twelve months in which school is offered in excess of at least six hours a day. States that the purpose shall be to improve academic achievement. Participation will be funded in accordance to pupil weights in the school finance formula. Directs the State Board of Education to establish selection criteria for a competitive grant process for plans that will provide measurable results and address remediation and offer the program to a diverse group of school districts or sites, based on geography and school size. (Effective: July 1, 1990)

TESTING

- SECTION 19:** Amends 70 O.S., Section 1210.508 to require the State Department of Education to review existing norm-referenced tests commercially available for statewide use. The Department shall designate the tests which evaluate the broadest range of identified, age-appropriate competencies. This selection process shall be coordinated with the Curriculum Committee. The first report of the review shall be filed with the Legislature by June 30, 1992, and subsequent reports every three years thereafter. Beginning with the 1992-93 school year, the State Board of Education shall provide school districts additional testing programs to measure additional competencies as part of the Oklahoma School Testing Program.
- SECTION 20:** Amends 70 O.S., Section 1210.507 by directing the State Board of Education, by July 1, 1990, to require each school district to provide educational material to their students, parents, and at-large public about the meaning and use of tests administered as part of the Oklahoma School Testing Program Act. The Department of Education shall prepare and distribute materials to local school districts.
- SECTION 21:** Amends 70 O.S., Section 1210.531 consistent with the previous section.

DEREGULATION

- SECTION 22:** New law creating a six-member Oklahoma School Deregulation Committee until May 31, 1991. Five members shall be appointed by the State Superintendent of Public Instruction from Task Force 2000 within 30 days of the effective date of this section. The State Superintendent of Public Instruction is the sixth member and chair. The duties of the committee include the identification of appropriate areas for deregulation and the review of student transfer laws to make them more flexible and less restrictive. The committee's report is due by May 31, 1991. The State Board of Education shall review the report after July 1, 1991.

ALTERNATIVE TEACHER CERTIFICATION

- SECTION 23:** New law establishing a procedure for the State Board of Education granting Alternative Program teaching certificates to persons with a baccalaureate degree who wish to teach foreign languages, math or science. Requires the person to indicate intention to seek full certificate, as stipulated by this section, for the specialization that the person will teach. Requires proof from an accredited school district offering employment. Limits the persons to teaching only secondary math, science or language courses. Such teachers must have five years of work experience outside education in the specialty and file a plan with a director of teacher education to meet all certification requirements for a standard certificate except for student teaching within five years. Requires alternative certification teachers to participate in the Entry-Year Assistance Program.

COUNTY SCHOOL SUPERINTENDENT

- SECTION 24:** New law abolishing the Office of County Superintendent of schools, but allows current superintendents to complete their terms in office. Transfers the responsibility of county superintendents in approving pupil transfers to the State Board of Education.
- SECTION 25:** Amends 26 O.S., Section 13A-106 to require school board members or candidates to have a high school diploma or GED.
- SECTION 26:** Amends 70 O.S., Section 5-110 to require school board members to attend training workshops after their election and deletes language exempting members with prior board experience. Members shall complete the training requirements within 9 months (current is 13 months) of their election.
- SECTION 27:** Amends 70 O.S., Section 5-110 by requiring school board members to attain their 15 hours of continuing education during the first year of each full term that they serve and requires the State Department of Education and Vocational and Technical Education to jointly approve such training courses.

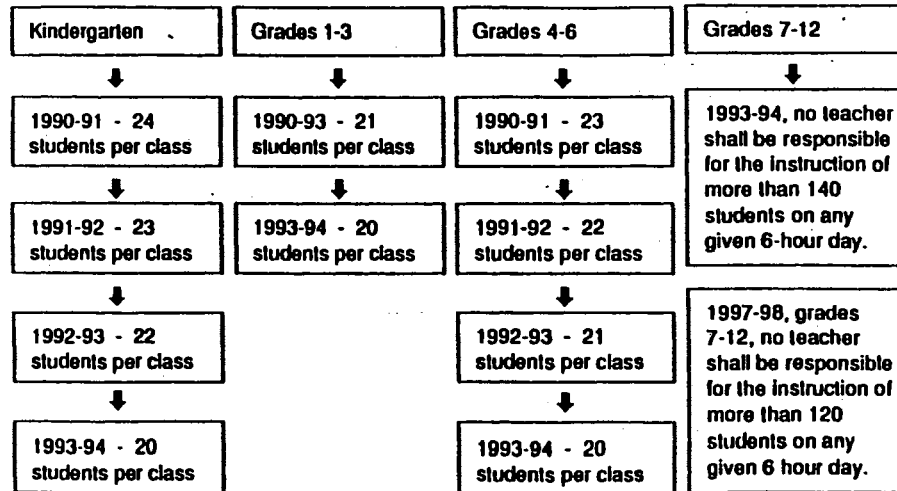
CLASS SIZE REDUCTION

- SECTION 28-29:** Amends 70 O.S., Section 18-113.1 and 18-113.2 and by lowering class size as provided (see attached chart). Any class size violation shall result in denial of accreditation in accordance with Section 2 of this act. (Effective: July 1, 1990)
- SECTION 30:** New law stipulating that class size shall be calculated as the average daily membership divided by the number of instructional staff, excluding self-contained special education classes, special education classes, and chapter 1 teachers, by school site. States that certain teachers shall not be counted in the computation who teach certain subjects. Beginning with the 1993-94 school year, no teacher shall be responsible for the instruction of more than 140 students in grades 7-12. Beginning with the 1997-98 school year, no teacher shall be responsible for the instruction of more than 120 students in grades 7-12. (Effective: July 1, 1990)
- SECTION 31:** Amends 70 O.S., Section 6-127 by requiring school sites to provide a teachers' assistant or volunteer to each K-2 class with more than 20 A.D.M. and which has more than 20% of the pupils meeting certain criteria which are commensurate with eligibility for the National School Lunch Act.
- SECTION 32:** Amends 70 O.S., Section 1-111 to provide that starting with the 1993-94 school year, the school day for kindergarten may consist of six hours devoted to school activities.

PARENTAL INVOLVEMENT

- SECTION 33:** Amends 70 O.S., Section 5-130 directing the State Board of Education to encourage local boards to promote the use of school buildings for community benefit before and after school.
- SECTION 34:** New law providing that it shall be the policy of the State Board of Education to encourage each school district to explore outreach opportunities through school-parent agreements. Such agreements may emphasize the importance of parental involvement in the pupil's education, opportunities for remediation, and the importance of parent-teacher conferences. Requires local school districts to develop initiatives to promote schools as a congenial place for parents to visit. Directs the Board of Education to establish a program to encourage private employers to give employees with children in school time off to attend parent-teacher conferences at least once each semester.

CLASS SIZE REDUCTION PROCESS



- SECTION 35:** New law directing the State Board of Education to develop a parent education program for parents. The program is to be phased in starting with the parents of academically at-risk children under age three by the 1991-92 school year. Requires all school districts to offer this program by the 1994-95 school year. States that the program shall emphasize the role of parents in the education of their children and should use other states' programs as a possible model for Oklahoma.

RESTRUCTURING THE LEARNING ENVIRONMENT

- SECTION 36:** Amends 70 O.S., Section 1210.551 to require the State Board of Education to determine, by March 31, 1990, pilot project criteria and develop a selection process for considering proposals from local boards wanting to replace the traditional organization of teaching and learning with innovative pilot projects. Gives preference to those proposals giving teachers a substantial policy-determination role and a process for measuring the progress and achievement of students.

PARENTS OF FAMILIES RECEIVING AFDC

- SECTION 37:** New law directing the Department of Human Services to encourage parents receiving AFDC to enroll their children in preschool or kindergarten or other appropriate school settings. Allows parents who attend parent-teacher conferences or parent education programs required by school authorities to apply the equivalent time to work experience or job training requirements, if federal law provides.

STUDENT DISCIPLINE

- SECTION 38:** New section directing the State Department of Education to prepare educational materials for local districts related to effective classroom discipline alternatives to corporal punishment.
- SECTION 39:** Amends 70 O.S., Section 5-117.4 by cleaning up language due to the new accreditation standards.

STATE BOARD OF EDUCATION

- SECTION 40:** Amends 70 O.S., Section 3-101 requiring that new State Board of Education members shall be appointed on the basis of congressional districts. Requires such board members appointed after April 2, 1992, to have a high school diploma or equivalent. Provides that the Superintendent of Public Instruction should serve as chair of the State Board instead of President.

EDUCATION OVERSIGHT

- SECTION 41:** New law creating the five-member Education Oversight Board. Members include the chairs of the House and Senate Education Committees, one member appointed by the Governor, and one each by the two presiding officers in the Legislature. The three appointed positions shall not be legislators and shall serve four year terms. No more than one may be appointed from a congressional district county, city or town. The chair and vice-chair are elected annually.
- SECTION 42:** New law creating the Office of Accountability. Provides that the Office of Accountability shall be provided budget support by the State Department of Education.
- SECTION 43:** New law specifying the duties of the Secretary of Education as the head of the Office of Accountability and in overseeing implementation of SB 183 and this bill. Allows the Secretary to submit funding and statutory recommendations to the Governor and legislative leadership for education in Oklahoma.

TEACHER SALARIES AND INCENTIVE PAY

- SECTION 44-48:** Providing new minimum state salary schedules for the 1990-91 through 1994-95 school years. Beginning in the 1990-91 school year the minimum salary for a beginning teacher with a bachelors degree will be \$17,000. By 1994-95 that salary will be \$24,060.
- SECTION 49:** Amends 70 O.S., Section 5-141 to provide that teachers' salaries should not be calculated solely as a proportion of administrators' pay in the school district. Encourages districts to develop compensation schedules to reflect the districts' particular circumstances and to provide subject area differential and incentive pay for districts with specific geographical attributes. Requires districts, beginning with the 1990-91 school year to allow the public inspection of school superintendents' contracts at the State Department of Education.
- SECTION 50:** New law requiring by September 1, 1990, the State Board of Education shall develop not less than five model incentive pay plans and distribute information on them to local school boards. No plan prepared by the Board or implemented by the local board shall permit more than a 20% increase in a teacher's salary for one year. An incentive award shall be an annual award and not be considered as part of the teacher's base salary. Beginning with the 1991-92 school year, school districts may adopt an academically-based incentive pay plan which may include one developed by the State Board of Education. Requires the appointment of a community advisory committee to assist the school board in awarding incentive pay. Requires local boards to appoint an advisory board to assist in the development of its plan. Such districts' plans shall be submitted to the State Board of Education by March 1. School districts will be required to adopt plans upon the petition of 25% of the district's classroom teachers. Provides that pupil test scores shall not be the sole criteria used for determination of incentive pay.

STAFF DEVELOPMENT

- SECTION 51:** Amends 70 O.S., Section 6-158 to permit districts to reimburse teachers and administrators who complete staff development courses in their field of instruction or in courses that will enable them to obtain additional professional qualifications one-half of the tuition if they receive a 3.0 or better. (Effective: July 1, 1990)

MINORITY EDUCATORS

- SECTION 52:** New law directing the State Board of Education to work with the State Regents for Higher Education in developing a program for recruiting, training, and placing minority educators in public schools, including the development of a program modeled after the South Carolina Teacher Cadet Program.

VO-TECH

- SECTION 53:** Amends 70 O.S., Section 14-103 to require the State Board of Vocational and Technical Education to implement higher academic standards emphasizing communication, computation, and applied science for its students. Requires the Board to develop a plan for providing adequate vocational courses for all students with the ability to benefit from them. Directs the Board to cooperate with the State Department of Education in development of "hands-on-career exploration" activities for grades 6-10 and integrating academic competencies into vocational instruction. Directs the Board to develop a plan for teacher training and acquisition of new technology to modernize vocational education programs.

AT-RISK STUDENTS

- SECTION 54:** New law directing the State Board of Education to review federally-sponsored at-risk student pilot programs and to identify alternative such programs to local schools in order for them to explore alternative education programs targeted for the at-risk students.

TRAINING FOR SCHOOL ADMINISTRATORS

- SECTION 55:** New law directing the State Board of Education to study programs, using models and expertise from the private sector, targeted at the development of leadership skills for school administrators. If funds are available, such programs are to be completed for the 1992-93 school year.

SCHOOL/BUSINESS PARTNERSHIP

- SECTION 56:** Amends 70 O.S., Section 5-145 to encourage local school boards to explore the benefits of local foundations and establish partnerships with local businesses to supplement publicly funded basic programs.

TEACHER STANDARDS

- SECTION 57:** New law requiring the Professional Standards Board to create a subcommittee for teacher training in the 21st century. The subcommittee shall take notice of the critical role in the education process as well as projected teacher shortages. Other concerns are the development of minority teachers and standards for alternative certification. The committee is to report to the State Board of Education by January 1, 1991.

TEACHING PRINCIPALS' CERTIFICATION

- SECTION 58:** Amending 70 O.S., Section 1-116 to require teaching principals to hold an administrative certificate after July 1, 1993.

DUPLICATION IN EDUCATION SYSTEMS

- SECTION 59:** Provides that the State Board of Education, the State Board of Vocational and Technical Education, and the Oklahoma State Regents for Higher Educational shall examine the educational service delivery system in Oklahoma to determine areas of duplication and overlap in the provisions of educational services. The review is to include various areas of interagency coordination, private sector support to education, and technical assistance to schools developing school based child care and at-risk programs. Requires the filing of the study with Task Force 2000 by January 1, 1991.

WEIGHT STUDY

- SECTION 60:** Requires the State Board of Education to review school formula weights, using the education cost accounting system, and make its recommendations for any revisions to the Governor, Speaker, and President Pro Tempore by July 1, 1991. The review shall be based on a study done by the Special Joint Committee on School Finance.

SPECIAL EDUCATION

- SECTION 61-64:** New law creating the Oklahoma Special Education Assistance Fund to provide funding to local school districts where exceptional children are placed by a state agency in custodial or noncustodial foster care homes; group homes or residential hospitals or shelters and independent living facilities. The maximum that could be paid from the fund would be \$2,000 per child per month.

ADMINISTRATIVE COSTS

- SECTION 65:** Requires the State Board of Education to develop a plan to limit the percentage of school district expenditures for administrative services. Makes provisions for an advisory committee. The plan is to be provided to the Governor, Speaker, and President Pro Tempore by December 31, 1990. Categories of expenditures to be included are delineated.

STUDENT RECORDS

- SECTION 66:** New law stating that no student shall be advanced to the next grade level after the recommendation of a teacher that the child should be retained unless a written demand is signed by the parent or guardian. The demand becomes part of the student's permanent record.

TEACHER CONTRACTS AND SCHOOL
PERSONNEL DUE PROCESS RIGHTS

- SECTION 67:** Amends 70 O.S., Section 6-101 provides that school districts or board members shall not be liable for the unfulfilled portion of any teacher or administrator's salary if a school site is closed due to accident, storm, fire or otherwise, except for epidemics or other closings ordered by a public health authority, and another suitable site cannot be found. (Effective: July 1, 1990)
- SECTION 68:** New law providing definitions for the sections related to due process. Defines "career teacher" to mean one who has completed three consecutive school years as a teacher at one district under a teacher's contract. Probationary teachers are those who have served less than three years. (Effective: July 1, 1990)
- SECTION 69:** Provides that the powers of school superintendents related to due process shall be exercised by the county school superintendent in the case of a dependent district. (Effective: July 1, 1990)
- SECTION 70:** New law stating that any rights created by these sections related to due process of the bill can be changed by the Legislature. (Effective: July 1, 1990)
- SECTIONS 71-72:** Amends 70 O.S., Sections 6-102.2 and 6-102.3 consistent with the new teacher due process sections. Authorizes teacher and administrator evaluations to be used in the hearing before the Board and the trial de novo. (Effective: July 1, 1990)
- SECTION 73:** Creates a thirteen-member Administrator Evaluation Committee by July 1, 1990 to serve until October 1, 1990. Seven members appointed by the Governor from Task Force 2000. Of these seven two are school administrators, two teachers and three non educators. The Speaker of the House shall appoint three lay members. The Senate President Pro Tempore shall appoint three members who are school principals. The committee members shall select the chair of the committee. The committee, within 90 days of the committee's appointment, shall develop standards for the evaluation of administrators and provide such to the State Board of Education and guidelines for training and support programs for administrators and submit such to the Department of Education.
- SECTION 74:** New law providing that an administrator found to have engaged in sexual misconduct shall be dismissed or nonreemployed. (Effective: July 1, 1990)
- SECTION 75:** Providing short title of "Teacher Due Process Act of 1990." (Effective: July 1, 1990)
- SECTION 76:** New law directing the State Board of Education to promulgate standards of performance and conduct of teachers and requires such to be distributed by local school boards to teachers by April 10 of each year. Such standards shall be considered by local boards in determining the professional performance of teachers in due process proceedings. (Effective: July 1, 1990)
- SECTION 77:** Restates grounds for dismissal or nonreemployment of career teachers, including instructional ineffectiveness, unsatisfactory teaching performance, and repeated negligence of duty. Provides that probationary teachers may be dismissed or nonreemployed for cause. (Effective: July 1, 1990)
- SECTION 78:** Restates current law exempting certain categories of teachers from the dismissal, suspension, and nonreemployment due process provisions. (Effective: July 1, 1990)

- SECTION 79:** New law stating that when an administrator, through a teacher evaluation or from a board member, superintendent, or other administrator, identifies poor performance or conduct which may lead to a recommendation of dismissal or nonreemployment, the administrator shall make a written admonishment and establish a period not to exceed two months to rectify the condition. If the administrator fails or refuse to admonish the teacher after notification to do so, the local board, superintendent or other administrator will admonish the teacher. Provides that if the teacher does not correct the situation, the administrator shall make a recommendation to the school superintendent for dismissal or nonreemployment. Supulates that a teacher cannot be dismissed for certain job-related poor conduct unless the admonishment requirement is satisfied. (Effective: July 1, 1990)
- SECTION 80:** New law stating that the superintendent must prepare in writing a recommendation to the local board for the dismissal or nonreemployment of teachers, giving the statutory reasons for career teachers and cause for probationary teachers. (Effective: July 1, 1990)
- SECTION 81:** New law providing the process that the local board follows upon receiving a superintendent's recommendation of dismissal or nonreemployment. Provides that the teacher is to be notified by certified mail or substitute process of the recommendation and the right to a hearing before the board and the time and place of the hearing. Requires the hearing to take place in the district between 20-60 days after the teacher's receipt of notice. Requires the notice to set out the grounds or cause for action and the underlying facts. Allows the teacher full rights in his defense. Requires the board's vote on the recommendation to be in open meeting. Gives career teachers 10 days after the decision to request a de novo trial in district court. Provides that the board's decision for probationary teachers to be final. Requires career teachers to be compensated during the hearing and trial de novo and probationary teachers during the hearing only unless the hearing is for nonreemployment. (Effective: July 1, 1990)
- SECTION 82:** New law regarding the trial de novo of career teachers. States that if a career teacher fails to petition for a de novo trial that the board's decision shall be considered final. Requires the trial de novo to be scheduled by the court at the earliest possible time that permits both parties time to prepare, provided that the trial will commence between 10-30 days of the court's receipt of the school board's answer. Supulates that the standard of proof at the hearing shall be the preponderance of the evidence and the burden of proof shall be on the superintendent and school board in a nonjury trial. Requires the judge to make a decision within three days of the trial's conclusion. Allows the judge to order the prevailing party attorneys' fees and costs. Makes the decision binding on both parties unless they seek to appeal to a higher court. (Effective: July 1, 1990)
- SECTION 83:** New law stating that the procedures for disciplining teachers shall be that provided by law on the date that the dismissal or nonreemployment recommendation is made to the board of education. (Effective: July 1, 1990)
- SECTION 84:** New law permitting a superintendent or local school board to immediately suspend a teacher with pay during the process of a dismissal or nonreemployment procedure in the best interests of the children. (Effective: July 1, 1990)
- SECTION 85:** New law giving teachers involved in a consolidation or annexation credit for prior service. (Effective: July 1, 1990)
- SECTION 86:** New law providing that a school support employee found to have engaged in sexual misconduct shall be dismissed or nonreemployed. (Effective: July 1, 1990)
- SECTION 87:** Amends 70 O.S., Section 14-108 consistent with new language related to career teachers. (Effective: July 1, 1990)

STUDENT TRANSFERS

- SECTIONS 88-92:** These sections amend current law and provide for student transfer appeals to State Board of Education, but limits its authority to correcting actions that violate the statutes. The amendments eliminate the requirement for certain transfer fees, leaving law pertaining to dependent transfer fees intact. (Effective: July 1, 1990)

NEW SCHOOL FUNDS

- SECTIONS 93-97:** Creates the Common School Fund authorized in the Oklahoma Constitution. Requires that revenues from the fund shall be apportioned to public schools through the State Aid Formula. Directs that after January 1, 1991, ad valorem revenues raised from commercial/industrial real and personal property and public service corporations on the fair cash values over \$500,000, and, after July 1, 1991, gross production tax, motor vehicle registration taxes and fees, and rural electric cooperative taxes dedicated to schools shall be placed in the fund. Provides procedures to transfer the ad valorem revenue from the counties to the state for deposit in the Common School Fund. (Sections 93 and 97 have January 1, 1991 effective dates).
- SECTION 98:** New law directing the Office of State Finance to present, as part of the official certification process for each fiscal year to the Governor and Legislature, an estimate of the revenues which will accrue to the General Revenue Fund as a result of the tax increases contained in this bill. Requires the Office of State Finance to create a separate and identifiable account within the General Revenue Fund into which shall be transferred monthly one-twelfth of the estimated annual revenue attributable to the tax changes. Specifies that funds deposited in the separate account shall only be used to fund the reforms in this bill.
- SECTION 99:** Amends 68 O.S., Section 2355 to adjust the tax brackets for individual income tax. Increases the rate of the corporate income tax from 5% to 6%. The change in the income tax is to become effective for all taxable years beginning after December 31, 1989. (Effective: January 1, 1990)
- SECTION 100:** Amends 68 O.S., Section 2370 to increase the tax on state and national banks and credit unions from 5% to 6%. The change in the bank tax is to become effective for all taxable years beginning after December 31, 1989. (Effective: January 1, 1990)
- SECTIONS 101-104:** Amends 68 O.S., Sections 1354, 1354.2, 1354.3 and 1402 to increase the state sales and use tax rate from 4% to 4.5%. (Effective: February 1, 1990)
- SECTION 105:** States legislative intent that the State Board of Equalization not raise the minimum assessment ratio for locally assessed property in order to give the Legislature time to consider any additional property tax relief. (Non-codified)
- SECTION 106:** New law creating the Oklahoma School Land Fund if amendments to Section 3 of Article XI of the Constitution are approved by the people. Requires that all revenues in the fund shall be distributed through the State Aid Formula.

STATE AID FORMULA

- SECTIONS 107-108:** Creates a new school finance formula applicable July 1, 1990. Uses average daily membership for both Foundation and Salary Incentive Aid. Applies both the special education weights and the economically disadvantaged weight to both sides of the formula. Adds a grade level weight for early childhood programs for children not paying tuition. Provides for the calculation of both small school weight and district sparsity-isolation weight and applies whichever is greater with restrictions. Provides if the six dedicated revenues in HJR 1005 are approved by the people for redistribution, then the small school weight will no longer be used. Retains funding for transportation and the

supplement. Makes a district's excessive general fund carryover a penalty against state aid beginning with the 1992-93 school year. Adds a new weight for optional extended school year. Charges dedicated revenues in Foundation Aid.

SECTIONS 109-112: Limits the use of the current school finance formula and pupil weights to prior to July 1, 1990.

TEACHER RETIREMENT

SECTION 113: Amends 70 O.S., Section 17-105 related to teacher retirement by striking the use of the term "tenure" related to teacher service. (Effective: July 1, 1990)

SCHOOL GENERAL AND BUILDING FUND

SECTIONS 114-115: Amends 70 O.S., Sections 1-117 and 1-118. Section 1-117 specifies that the revenue from the 39 operational mill levies must be deposited in the district's general fund. Section 1-118 specifies that the revenue from the 39 operational mill levies may not be deposited in the district's building fund.

SECTIONS 116-119: Recodification (Effective: July 1, 1990).

SECTION 120: Noncodification.

SECTIONS 121-124: Repeals certain sections of Title 70. (Repealers in Sections 121 and 122 effective July 1, 1990)

SECTION 125: Makes section repealing certain school land statutes contingent upon passage of state questions.

SECTIONS 126-130: Provides operative dates for certain sections.

SECTION 131: Emergency

PREPARED BY: House Staff

DATE: January 30, 1990

GGH:go/HB1017

APPENDIX F

INSTITUTIONAL REVIEW BOARD FORM

OKLAHOMA STATE UNIVERSITY
INSTITUTIONAL REVIEW BOARD
HUMAN SUBJECTS REVIEW

Date: 02-16-95

IRB#: ED-95-048

Proposal Title: SUPERINTENDENT PERCEPTIONS REGARDING HOUSE BILL 1017

Principal Investigator(s): Gerald R. Bass, Steve Hart

Reviewed and Processed as: Exempt

Approval Status Recommended by Reviewer(s): Approved

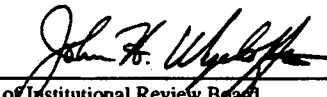
APPROVAL STATUS SUBJECT TO REVIEW BY FULL INSTITUTIONAL REVIEW BOARD AT NEXT MEETING.

APPROVAL STATUS PERIOD VALID FOR ONE CALENDAR YEAR AFTER WHICH A CONTINUATION OR RENEWAL REQUEST IS REQUIRED TO BE SUBMITTED FOR BOARD APPROVAL.
ANY MODIFICATIONS TO APPROVED PROJECT MUST ALSO BE SUBMITTED FOR APPROVAL.

Comments, Modifications/Conditions for Approval or Reasons for Deferral or Disapproval are as follows:

Upon development of the questions for the follow-up interview, please submit them for review. It will not be necessary to submit a new application; rather, the list will be processed as a modification to the original project.

Signature:



Chair of Institutional Review Board

Date: February 21, 1995

VITA

N. Steven Hart

Candidate for the Degree of

Doctor of Education

Thesis: EDUCATION REFORM: OKLAHOMA SUPERINTENDENTS' PERCEPTIONS OF HOUSE BILL 1017 FROM 1990-1995

Major Field: Educational Administration

Biographical:

Personal Data: Born in Duncan, Oklahoma, March 26, 1950, the son of Loyd L. and Bessie Ruth Hart.

Education: Received Bachelor of Arts degree in English Education from Northwestern State College, Alva, Oklahoma in May, 1974; received the Master of Education degree in Counseling from Northwestern Oklahoma State University, Alva, Oklahoma in May, 1976; completed the requirements for the Doctor of Education degree at Oklahoma State University in July, 1995.

Professional Experience: English/Speech Teacher, Helena State School for Boys, Helena, Oklahoma, 1974-1975; English Teacher/Principal, Helena-Goltry Middle School, Goltry, Oklahoma, 1975-1980; Principal, Helena-Goltry High School, Helena, Oklahoma, 1980-1981; Elementary Counselor, Enid Public School, Enid, Oklahoma, 1981-1982; Junior High Principal, Waller Junior High School, Enid, Oklahoma, 1982-December 1987; Junior High Principal, Carl Albert Junior High School, Midwest City, Oklahoma, January 1988-1989; Assistant Superintendent, Blackwell Public Schools, Blackwell, Oklahoma, 1989-1995.