AN INQUIRY INTO THE INVESTIGATION OF A SCHOOL DISTRICT

by

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ABSTRACT

From his views of an organization, Anthony Downs suggests that recommendationsfor significant changes are likely to come from outside consultants. An outside agency, detached from operational responsibilities, could provide officials in the organization with the information they need for change. In the sense of overcoming institutional inertia, Downs maintains that an outside agency will make recommendations for change that depart significantly from the status quo.

In order to see what value an outside agency has to a public school organization, this thesis relates Downs'proposition to an empirical study made by outside consultants on the Greater Victoria School District. The investigation, which was initiated by the local board, sought to engage the school district personnel in a process of evaluation, to identify areas which appeared in need of improvement, and to formulate recommendations for change.

The thesis analysed the difficulties perceived by investigators and their proposals designed to reach an "ideal" organization.

This required examining the model that the investigators used in order to describe the organization. From this understanding of the model, it was possible to analyse the report that emerged from the investigation, particularly as it applied to their recommendations for change. Lastly, the recommendations that were or were not implemented as well as the indirect changes that came about because of the investigation were assessed three years after the investigation.

It appears from the study made on this particular investigation that the payoff envisioned by Downs did not occur. First, the concept of an outside agency differs little from an ad hoc committee which, according to Downs himself, is constrained by a need for consensus. Second, the investigators did not have an adequate model of a school system that would help them identify a power elite in an organization, or enable them to make sound judgments on conflict, or fully understand the dynamics of change.

TABLE OF CONTENTS

TABLE OF CONTENTS
(Cont'd)

TABLE OF CONTENTS
(Cont'd)

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CHAPTER I

INTRODUCTION

In organizations, change is related to information. Information serves as a form of mapping which enables the organization to chart with some confidence through relatively new and unfamiliar situations. Organizations require new information to discriminate, act upon, and respond to changes in their environment. However, because it is individuals and groups of individuals, not organizations, that search for information, both the range of alternatives considered and the type of decisions made will be significantly influenced by individual biases. This leads to a fundamental problem in organizational change. When those who seek information are also the people who will implement the change, there will occur most certainly an evaluation that weighs the proposed change against the effort in restructuring behavior. In this way, even simple changes become difficult to effect; major departures from the status quo a remote possibility. Anthony Downs suggests a partial escape from this dilemma by a separation of the two functions: search would be

conducted by an outside agency, free from any direct operational

responsibilities in the organization though quite familiar with its

goals, rules, behavior and routines. The payoff from such detach-

ment, he feels, could be very large. (Downs, 1967, p. 183) This

thesis is concerned with describing and evaluating the use of an out-

side agency for an educational organization as a means for analyz-

ing the strengths and weaknesses of Downs' proposition.

From January to June of 1966 the Greater Victoria

School District was the subject of an investigation by outside con-

sultants. The investigation, which was initiated by the local board,

sought to engage the personnel in a process of evaluation, to iden-

tify areas which appeared in need of improvement, and to formu-

late recommendations for change. The members of the consulting

team, Walter Hartrick and Lorne Downey, came from the Faculty

of Education at the University of British Columbia and their specific

area of expertise lay in educational administration. One can say,

presumably, that they possessed the knowledge of the goals, rules,

behavior and routines of a public school organization and particularly

its administrative structure, and that at the same time, they were

free from direct operational responsibilities. However, whether

they possessed the knowledge, detachment, and desire to "propose

changes involving major departures from the status quo" is actually

an assumption made by Downs and one that needs to be examined.

The investigation itself was conceived on a grand scale and bears similarities to a Royal Commission. It involved School Trustees, Administrators, Supervisors, Business Officials, Principals and Teachers in a proposed co-operative effort towards determining how the organizational structure, administrative procedures, and operating climate could be improved. All files were made available to the investigators. Additional information was obtained through such data gathering devices as briefs submitted by various associations, by questionnaire, and by direct observation. The investigation generated some controversy and some high expectations. In particular, a circular from the Superintendent's office anticipated that the recommendations would suggest a pattern of administrative practices, not only for the Greater Victoria School District, but for other large districts in the province. In scope and in promise, this was certainly the most comprehensive investigation of its kind that has been conducted in British Columbia. The question this research seeks to answer is how fruitful the investigation was.

THE PROBLEM

The main concern is to examine a suggestion by Anthony Downs that more significant decisions for organizational change would be possible by the use of an outside agency. In order to examine the strengths and weaknesses of the concept, this re-

search seeks to describe a study made on a public school organization by outside consultants and to evaluate its worth as an instrument of change. This description and assessment includes the following aspects:

-- the reason that the local board sought outside consultants

-- the nature of the problem as perceived by the consultants

-- the report and recommendations as a means for solving the problem

-- the impact of the investigation on the organization

-- an analysis and evaluation of an outside agency as suggested by this research.

It is customary to speak of the importance of one's thesis in the great scheme of things. The thesis appears to have some importance in a number of inter-related ways. First, the present public and professional concern about education carries with it a mounting pressure for the schools to change. However, the precise kind and direction of change are seldom thought out and presented in the manner of this investigation. In this way, the investigation and therefore this research become related to the twin concepts of change and inertia. These twin concepts form the dominant theme of educational literature. For example, Matthew Miles (1964) in his book on innovation in education reports on a study by Mort and his colleagues from the 1920's to the 1950's

which indicates that "Once a practical invention (such as a kinder-garten) has been devised to meet an underlying need -- a process itself occupying fifty years on the average -- approximately fifteen years elapses before three per cent of school systems install the innovation... complete diffusion of successful inventions appears to take approximately fifty years after the first authentic introduction." (in Miles, 1964, p. 315) This slow diffusion of new educational ideas is attributed to the absence of a scientific source of innova-tion in education, the lack of change agents to promote new educa-tional ideas, and the lack of incentive to adopt new ideas. The task undertaken by the investigators relates to this larger task.

In synthesizing information and presenting it on good authority, the investigators thereby functioned as change agents in the promotion and adoption of best practices in education. It would seem, then, that the Hartrick-Downey study has importance for providing some insights into the problem of institutional inertia within the educational system. Certainly some of the reasons why schools resist change will be found in the organizational structures with which they were concerned.

This leads to a second consideration on the importance of this thesis: despite the fact that innumerable such investigations are conducted across North America every year, none appear in the

educational literature.* This suggests that few post-investigation
analyses are attempted, of both the value of the authors' recom-
mendations and on implementation, or degrees of implementation
of the recommendations. One possible explanation for the lack of
analysis would be that reports become the property of local boards
who initiate the investigation, presumably with the hope that the
findings would be useful and at least not harmful to their interests.
To recommend is not to command, and ultimately, whatever the
substantive quality of the report, the investigations will mean what
the administrators choose to do about it. (Edelman, p.139) An
evaluation that includes the reason for the investigation, the con-
tent of the report, the recommendations that have or have not
been implemented, and some possible explanations for the outcome
of this kind of investigation is long overdue.

A third consideration comes from a growing awareness
that cultural institutions in general, and school institutions in parti-
cular, are not necessarily adaptive in a Darwinian sense. Science
and technology have enabled man to adapt his physical environment
to himself but the scientific consideration of man's social environ-
ment and its manipulation has only just begun. Through studies and
symposiums into the nature of social conflict utilizing inter-disci-

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* Actually no analysis of outside agencies appear in organiza-
tional literature.

plinary contributions, social scientists have shown concern for a basic problem that man's technological evolution is proceeding at an incomparably faster pace than man's limited behavioral adjustability. This tends to make of man a misfit in his own society. (de Reuck, 1966; Tinbergen, 1968) While school systems may not quite be the magic panacea for all social ills that educators have fondly thought, nevertheless a public school system through prolonged contact, is a profoundly influential force in society. The essential search is for a more responsive, flexible, and adaptive school system which keeps pace with social needs. It is hoped that this research will, by contributing towards an understanding of the forces of change and inertia in the school system, prove of value to those concerned to keep school systems adaptive to changing societies.

Delimitations of the thesis. The Greater Victoria School District is the second largest district in the province, comprising Victoria City, Esquimalt, Oak Bay, and part of Saanich. It employs some 1200 teachers in 56 schools. Because of the dispersal of the schools, any investigation of a large school district is a formidable undertaking involving a choice between abstracting some aspects of it and treating the ensuing problems in a rigorous way, or presenting as full a picture as possible by treating the problems in a less systematic and intensive way. Initially, Hartrick and Downey limited their focus to the School Board and to the Central

Administration. Part of the way through the investigation, the authors felt that the limitation was unrealistic and shifted to the second choice, that of a full picture, because "an analysis of the operation of the schools themselves becomes a most appropriate measure of the success of the Board and Central Administration." (Report, p. 76) For the thesis, this shift has presented two problems, the one connected to the size of the district and the other to the size of the Report.

The decision to analyze the operation of the schools by Hartrick and Downey meant that they would study the roles and behavior of Principals, Vice-Principals, department heads, and teachers, as well as the very difficult area of teaching and learning conditions. It was neither practical in terms of time and money, nor feasible in terms of competence, for this research to emulate the investigation in each of the schools. Further, the length of the Report as a result of the global approach -- 120 pages -- precludes the possibility of incorporating it literally into this body of work. Therefore, a wiser course for the thesis appeared to be in selectively presenting parts of the Report and in concentrating attention on the Central Administration and the School Board.

The methodology. In seeking to describe and evaluate an investigation, the task becomes essentially one of reconstruction. There are a variety of resources available for this reconstruction,

among them:

1. The report which contains the problem faced by the organization, the direction the investigators felt the district should go, and the proposals designed to move the organization in this direction.

2. Interviews with members of the central administration, school trustees and teachers. It was possible to discuss the investigation with Walter Hartrick and with Crawford Vogler a graduate student at the time of the investigation, who made up the third member of the team. Other information came from such diverse sources as Bernard Gillie, Superintendent of Schools from the Northwest Territories, but at the time of the investigation, the most outspoken principal in the district; with Dr. Sharp, Superintendent of Schools for the City of Vancouver who of all the superintendents in the province is the only superintendent appointed by the local board; with C. D. Ovans, General Secretary of the B. C. Teachers' Federation; with Bill Stavdal, an education reporter for the Victoria Daily Colonist. Through these and other interviews it was posssible to compose a reasonably credible picture of the events surrounding the investigation.

3. Additional information came from the files of the Greater Victoria Teachers' Association (G. V. T. A.) from which it was possible to trace the response of the teachers before, during, and

after the investigation.

    4. It was also possible to attend a school board meeting specifically to study the interaction of trustees with the members of the central administration.

    <u>The Plan of the Thesis</u>. Chapter 2 is concerned with the genesis of the investigation. There are a number of political factors which led to the decision of trustees to seek outside consultants and basically this chapter seeks to answer the question of why this investigation was considered necessary and what were the ob-. jectives for the board. Chapter 3 examines the nature of the investigation itself. Chapter 4 is concerned with a presentation of the relevant parts of the Report as they relate to this analysis. The main concern of this chapter lies with the model the authors brought to the organization as a sort of mapping to prepare the ground for its investigation. Organization theory, which is a set of interconnected hypotheses about organization features, i.e. span of control, complementarity of functions, line and staff, etc. fits within this larger conceptual framework. Chapter 5 discusses the changes in the organization, changes in personnel, and the recommendations that were implemented. It attempts to draw together the problems faced by an outside agency. These in turn form the basis for the generalizations regarding the strengths and weaknesses of outside agencies in the final chapter.

CHAPTER II

GENESIS OF THE INVESTIGATION

INTRODUCTION

Despite the variety of sources from which educational

organizations could develop a need for outside consultants, it is

possible to link this particular investigation with a central theme

in the literature around which most of the organizational problems

can be grouped: the question of school governance. Included in

this topic, which is basically the politics of school organizations

are the more visible phenomena of student militancy, teacher

militancy, the larger question of community participation, and the

related demands for accountability. There is a strong relationship

among these forces inasmuch as they are aimed at a greater say in

policy-making. The discontents are not confined to a particular

group but rather they reflect a general disenchantment with the

traditional forms and shape of the institutions. At one level, to be

sure, the groups are frustrating each other; but at another level,

there exists a common problem insofar as their frustrations are

really with the "system."

        This is not surprising nor is it particularly new. In

a study designed to help students find their way through organiza-

tional literature, Mouzelis finds a common and recurrent preoccu-

pation for the classical theorists to have been a concern for the im-

pact of the growth of large-scale bureaucracies on the power struc-

ture of society. (Mouzelis, 1967, p. 7) This concern of Marx,

Weber, Michels and the like regarding man's chances for a free

and meaningful existence with the growth of these bureaucracies

remains a very pertinent subject of inquiry. The problem as thus

defined "is to find out whether bureaucracy, despite its dimensions,

is still an administrative apparatus for the implementation of social

goals or whether it has lost its instrumental character; whether

from a tool in the hands of the legitimate policy-making body, it

has become itself the master dictating the general goals to be pur-

sued." (Mouzelis, p. 7)

        Despite its broadness, the question goes to the heart

of the problem for school governance which is the central concern

of this chapter. The genesis of the investigation is found in the

politics of school organization at both a provincial level and a local

level and involves the legitimacy of policy-making in the organization.

It is intended, therefore, to explore in section one the role of a

school trustee in the public school system, in particular, the link

with the servant and master problem that concerned earlier theor-

ists. Section two deals with the structure of school organization at a provincial and a local level. Section three draws from these findings to show the need for the trustees and to decide to create an outside agency as being simply a response to the politics of the organization.

I. The Role of a School Trustee

The Great Shift

A local school board derives legal authority from two sources: it is an agent of the provincial government in educational matters and a representative of the local electorate in educational matters. A local board has the function of localizing provincial authority and adapting it to the needs and aspirations of a local area. The mandatory duties and discretionary powers of school boards are contained in a Public Schools Act of which Section 97 sets the general terms of reference:

> 97. The Board of each school district shall:-
>
> (a) Abide by the provisions of this Act and the orders of the Council of Public Instruction.
>
> (b) Determine the local policy in conformity with this Act for the effective operation of the schools in the school district.

As with all legal language, the dictionary meanings are operationally close to irrelevant so far as the function of the local board in the political process is concerned. (Edelman, 1967) The section simply guarantees the right of local boards to exist,

although elsewhere in the Act it is said that local boards exist at

the pleasure of the provincial authority. The point, however, is

that the terms of reference cannot specify the day to day behavior

of a local board which is open to continual interpretation. One

guideline for behavior occurs when the Board is established as a

body politic and corporate in the following section:

> 89. The trustees elected or appointed under this Act
> for each school district and their successors in
> office shall constitute a Board of School Trustees
> for the district, and, under the name of "The
> Board of School Trustees of School District No.
> 61 (Greater Victoria)," shall be a body politic
> and corporate, with perpetual succession and a
> common seal, having the rights, powers, duties,
> and liabilities set forth in this Act.
>
> The rights, powers, duties, and liabilities of a
> Board of School Trustees rest only with the
> legally constituted Board and not with commit-
> tees of trustees or individual trustees.

While an individual trustee acts illegally if he makes

a decision that commits the organization to his policy, nevertheless

there remains a wide and flexible area of interpretation for the day

to day behavior of a trustee. A trustee is a politician who has run

for office with his own sacred policies. Little exists to prevent

him from generating consensus among other trustees. With the

prevailing notion regarding such matters as election and re-

election, he will conceive of his chances in terms of the frequency

of his name in the local press. Also it is more agreeable to his

ego if the item reads: "Trustee George Smith argued for qua-

lity education for our children...." rather than "The Victoria

Board discussed the need for quality...." Hartrick and Downey

recognized the ambiguity of legal language, though oddly enough,

not for trustees, but for principals, when they observed:

> "The minimum legal functions and responsibilities of
> the British Columbia principal are set forth in the
> School Act. But these are minimal. They merely
> specify what a principal must do. They do not suggest
> the many tasks that an effective principal is likely to
> perform; nor the many roles that he is expected to
> assume; nor the many skills and talents that he must
> acquire if he is to perform these tasks and assume
> these roles effectively." (Report, p. 77)

Perhaps a clearer image of a trustee is possible by

leaving legal language and examining the role as a historical and

symbolic development. Basically, a historical perspective shows

an erosion of power for local boards and a corresponding increase

for local administrators. Economist John Kenneth Galbraith has

identified a shift of power in his New Industrial State; his thesis

finds a counterpart in the discussion of the formal organization of

schools by Bidwell (1965) in the Handbook of Organizations. Since

these matters are at the heart of school governance it is well to

spend a few moments in exposition.

Galbraith observes that seventy years ago the corpora-

tion was the instrument of its owners. Today, the men who run

the corporations, unlike the earlier entrepeneurs, are largely un-

known. (p. 14) The requirements of technology and planning have

greatly increased the need of the industrial enterprises for special-

ized talent and for its organization. From these new needs there

has occurred a resulting shift in power in the industrial enterprise:

from the entrepeneur to group decision-making or from capital to

organized intelligence. This Galbraith refers to as the Technostruc-

ture.

The Technostructure arose in response to three prin-

cipal needs of modern industrial organization. First, the technolo-

gical requirements of modern industry are for large numbers of

specialists who are qualified in a limited area. The real accom-

plishment of modern science and technology, according to Gal-

braith, "consists in taking ordinary men, informing them narrowly

and deeply and then, through appropriate organization, arranging

to have their knowledge combined with that of other specialized but

equally ordinary men." (p. 73) Planning is the second factor.

Through planning, the organization foresees needs and insures an

adequate supply of materials and labor. And the third factor is co-

ordination.

Provided that we can leave aside for the moment the

troublesome question of talent in a public school organization as

compared say to General Motors, there is a parallel shift that has

occurred in response to growing complexity of school operation.

In school organizations, administrative offices emerged in re-

sponse to the increasing size and increasing complexity of opera-

tion which led to the precedent, largely unquestioned, of selecting

administrators from the teaching ranks. With the development of

grades, courses, and curricula came the need for conformity,

routinization, and co-ordination. Initially, fiscal and school plant

administration were retained by school boards who simply dele-

gated responsibility for academic administration to their superin-

tendent. (Bidwell, p. 994-5) By the turn of the century, day to

day fiscal and plant management had outpaced the capacity of lay-

men to supervise it, particularly inasmuch as the role of a trustee

is performed on his own time and not that of the organization.

Gradually the superintendent took over more and more of the

Board functions and the functions of an individual trustee shrunk

correspondingly until the process appears to have stabilized with

the establishment of the superintendent as the board's executive in

all aspects of school operation, while the board "took on a more

fiduciary role." (p. 995) Other positions appeared as they were

needed; for example, the principalship which was first a set of

clerical duties carried by one of the teaching staff. Bidwell con-

siders these increasing clerical tasks as "curricular complexity"

which tended to grow "beyond the scope of the superintendency (so)

authority for curricular and instructional supervision was vested

in the principal, who, like the superintendent continued to be re-

cruited from the teaching cadre." (p. 995) From the same com-

plexities, presumably, grew the other supervisory positions that today comprise the technostructure of modern school organizations and which is commonly referred to as the central administration.

Clearly, the organization is no longer the instrument of the school board who provides it with corporate status. Equally, clear, control and power have become dispersed through the various levels of administration. In effect, the transition could be thought of as complete when school boards accepted their fiduciary role in keeping with the designation of trustees as laymen and thereby gave explicit recognition to the expertise of the profession- als. The question that remains is one of determining the function of a group of laymen inside the structure of a specialized organi- zation. What is acceptable behavior for trustees as prescribed by professionals? What is the meaning of "school board" to the pub- lic that is represented and to the professionals who are governed by it? And lastly, what are the dilemmas that arise from this mix of professional and layman? Obviously, these are involved and large questions and their answers in any systematic way lie outside the scope of this paper; their value rather lies in providing a focus for the exploration of the "fiduciary role" of school boards.

The Fiduciary Role

As with legal language, the dictionary meaning of fiduciary role would not convey much about the actual operating

function of a local board. Yet it is necessary to grasp something

of the role if we are to understand the dilemma for trustees, and

which ultimately led, in this case, to an appeal for outside con-

sultants. There are a number of sources available on the road to

understanding. First, there is the body of writing in educational

administration from the men who have thought on these matters.

Second, there is an extension of the concept of instrumentality

which would hold that as the boards became less instrumental in

the running of the organization they became more expressive for

the organization in terms of a public school organization's relation-

ship with the public. And lastly, one can observe a school board

meeting which are public meetings and study the role of a trustee

in operation. From these brief considerations it is hoped some

understanding will emerge.

A trustee is elected to office through a ballot box

every two years.* Usually, his knowledge of the organization that

he has come to govern stems from his own school days and little

else beyond. Yet most trustees seek office with policies that in-

variably contain the assumption that schools are being poorly ad-

ministered and that fundamental changes should be made. (Gross,

---

* One trustee in Victoria had felt the call for public service and
put his name forward. He had been surprised, as he explained,
that his service was dependent on a ballot box.

et. al., 1958) Consequently, a trustee is predisposed to be a rival for the organization, and these predispositions are potentially quite serious in terms of support for the organization. A local school board can become a powerful antagonist especially in view of their legal and traditional status, their fiscal authority, and local community support. Board-superintendent relations more often than not are characterized by an uneasy balance or equilibrium. (Bidwell, p. 1013) It follows that one of the major tasks for members of the organization is that of developing strategies both for restraining trustees from attacking the organization and for incorporating trustees into the accepted norms of the organization. Nor is the process ever complete in that a trustee may not stand for re-election or be successfully re-elected after his two year term, and therefore the members of the organization must begin the process again.

A school board, then, is to be understood as an "interstitial body" part in and part out of the organization, and charged with relating the work of the schools to the community. (Getzels, et. al., 1968, p. 348) The image of a trustee is that of a man standing with one foot in the organization, the other in the community. His potential power lies in being able to arouse the community -- parents, taxpayers, and so on -- and also in being able to cause anxiety within the structures of the organization. In

this sense, the conflict may not be institutionalized. The signifi-

cance of this point is best shown by more recent works on the na-

ture of conflict by sociologists and in particular, Lewis Coser

(1967).

Coser belongs to the functional school of sociology

and he adopts the position that conflict serves a functional (bene-

ficial) need in organizations. The underpinnings of this theory

are largely derived from John Dewey's observation that con-

sciousness is a consequence of a hitch in the working of habit:

"Conflict is the gadfly of thought. It stirs us to observation and

memory. It instigates to invention. It shocks us out of sheeplike

passivity, and sets us at noting and contriving...Conflict is the

sine qua non of reflection and ingenuity." (cited in Coser, p. 20)

Organizations have served to integrate the pluralist society in

which we live as distinct from the unified structure of the medie-

val world; organizations provide built-in termination points to

conflict. (p. 41) Yet organizations, particularly the bureaucra-

tic forms, have a natural and inevitable tendency toward inertia,

routinization, and inflexibility. (Downs, 195-204) The need for

reliance on predictability creates pressures for rejecting innova-

tions which are perceived as interfering with established routines.

School organizations thus have a "powerful tendency to continue

doing today whatever they did yesterday," (Downs, p. 195) which

means that schools "wedded to the eternal yesterday of precedent

and tradition" (Coser, p. 22) will continue unchallenged towards

near ossification until parents, through their elected board, send

loud feedbacks of dissatisfaction into the organization. But not

even Coser, with his near enthusiasm for conflict, would approve

a reverse flow of energy, that is, from the trustees back to the

open community. For then, conflict spills outside its institution-

alized framework.*

In order to contain potential conflicts, educators have

developed an ideology. An ideology is developed by educators as

an efficient means of communicating with trustees and through

them the parents who have control over the resources; it is a form

of shorthand because neither group has time to listen to details.

The many people whom an educational organization needs to per-

suade have neither the time nor the interest to absorb the details

and it would be irrational from their point of view to become well

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* France serves as a present example of functional violence that
lies outside Coser's approved areas for conflict. Students,
apparently engaged in senseless activity, nevertheless forced
changes which were implemented relatively quickly by the Minister
of Education: he eased university entrance examinations, allowed
for some participation of students in educational policy-making,
replaced power of individual professors with that of departments
and overhauled the budget. To answer the question of when con-
flict has been beneficial would seem to be the prerogative of
history, and not simply a question for pre-determination by
institutional boundaries.

In this sense, Coser really belongs to establishment sociology.
He is concerned with piecemeal changes designed to revitalize
an old model rather than re-fashion a new one.

informed. This ideology, according to Downs, is "a verbal image

of that portion of the good society relevant to the functions of the

particular bureau concerned plus the chief means of constructing

that portion." (p. 237) The ideology of free public school educa-

tion has emphasized the positive benefits to the child and to the

society, but de-emphasized the costs; emphasized the benefits to

the social system rather than to teachers and administrators; and

stressed the necessity of co-operation by all parties in the educa-

tional enterprise. It most clearly serves as a public relations

vehicle for the organization, focusing public attention on the values

for children. As Edelman puts it:

> "But the financing of these same programs involves
> public policies of a different order. Here the symbol
> of "free" education and other benefits, the complexity
> of the revenue and administrative structure, have
> facilitated the emergence of highly regressive pay-
> roll, property, and head taxes as the major sources
> of revenue. Thus, business organizations, which by
> and large support the public schools that provide
> their trained personnel and the social security pro-
> grams that minimize the costs of industrial pensions,
> pay relatively little for these services, while the
> direct beneficiaries of the "free" programs pay a
> relatively high proportion of the costs." (p. 42)

At the level of superintendent-board relations, the

ideology stressing co-operation is most evident. Textbooks and

journals in school administration are almost unanimous in contend-

ing that it is the function of the board to legislate and of the super-

intendent to execute. (Griffiths, 1966, p. 93) The general con-

sensus is that the board should establish policy and that the super-intendent should administer it. Griffiths notes that in practice, however, policy formation and administration are closely related therefore the superintendent generally initiates policy and provides the evidence on which the board makes policy decisions. He feels only a general demarcation of duties should exist thus permitting a liberal exchange of ideas. (p. 94) Getzels, et. al. argue that the superintendent and board "must constantly work toward agreement ..." (p. 364) but in a moment of clarity and realism observe that the established legislative-executive function is a "cliche;" "The executive influences policy by furnishing information to the board and actually recommending policy." (p. 360)

Hartrick and Downey approach this rather sensitive area with elaboration of their ideal concept:

> "Ideally, the Board should assume that its primary task is to set policy; but common sense dictates that in carrying out this task the Board will look to its executive officer for advice. Ideally, the executive officer should assume that his primary task is to implement policy; but common sense dictates that he take steps to assure himself that he is acting in accordance with the Board's wishes. Ideally, the Board should assume responsibility for the evaluation of policy; but since the executive officer has a hand both in the shaping and in the implementation of policy, it follows that he ought to be involved in the process of evaluation." (Report, p. 31)

But this is ratification, not decision. It is participation in a ritual act and only in a minor degree participation in policy-making.

The substantive decisions are formulated by the groups in the central administration, agreed to by the superintendent, and brought to the board for ratification. One need only ask what would happen should the board reject a group decision and Galbraith replies:

> "Specifically the group reaches decision by receiving and evaluating the specialized information of its members. If it is to act responsibly it must be accorded responsibility. It cannot be arbitrarily or capriciously overruled. If it is, it will develop the same tendencies to irresponsibility as an individual similarly treated. (p. 80)

Further to this point, the two following items, taken from a school board meeting in May of 1969 will illustrate the ratifying rather than policy-making proposition:

Item 1. This concerns the hiring of new teachers into the Victoria district. The teachers applied to the superintendent, were interviewed and their credentials checked by a director of instruction. A trustee stood up in the meeting, read a long list of names and concluded with a motion to accept the teachers from "Adams" to "Wilson" which was duly seconded.

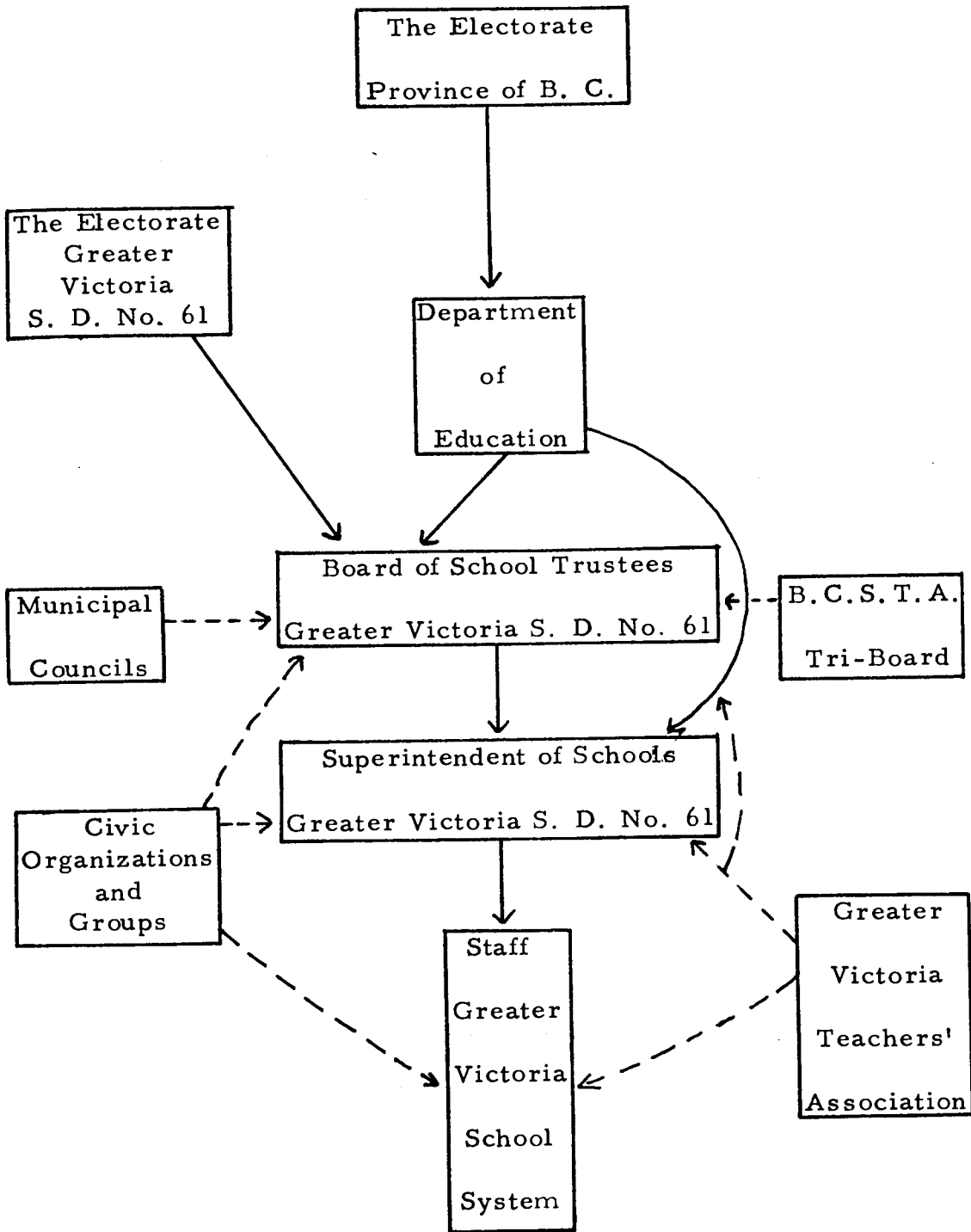Item 2. The school board wished to establish a policy for parking on the school grounds. It was that teachers should pay three dollars a month for paved parking, and two dollars for unpaved. The principals had refused to implement the policy in their schools. For his part, the superintendent explained that as a principal was made responsible for his school by the School Act, it was unwise to force a principal to adopt a policy

which he felt was not in the best interest of the school. As a result, the trustees had no way of imposing their proposed legislation.

Any ideal-typical formulation of the roles of the bureaucrat and the politician implies that the organization is a tool in the hands of its political master. But the social reality diverges from the ideal formulations. In school organizations, the power position of the administrators, based on expertise becomes a weapon against the trustee. A trustee is a dilettante in administrative matters and not in a position to control the organization. A school board today is a symbol of community governance. In Edelman's terms, it serves an expressive function reassuring the mass public. It is one of the political forms that legitimize the awarding of benefits, and conversely the depriving of benefits; the capacity to exploit and the capacity to be exploited; the belief in popular sovereignty and the routine ignoring of the public will. At the same time that it serves in this expressive role, the school board by its existence permits the organized groups in public school education to maintain positions of power and to confer tangible benefits among themselves without public interference.

II. The Provincial Structure of Public Schools

> "The provision of educational services is a co-operative endeavor, calling for contributions from and harmonious relationships among a large number of agencies and individuals." (Report, p. 10)

The Electorate
Province of B. C.

The Electorate
Greater
Victoria
S. D. No. 61

Department
of
Education

Board of School Trustees
Greater Victoria S. D. No. 61

Municipal
Councils

B.C.S.T.A.
Tri-Board

Superintendent of Schools
Greater Victoria S. D. No. 61

Civic
Organizations
and
Groups

Staff
Greater
Victoria
School
System

Greater
Victoria
Teachers'
Association

_____ Formal lines of authority

_ _ _ _ _ _ _ Informal lines of influence

FIGURE 1: -- The Partnership in Education

The Public School System

The formal elements of the public school system as it appears in a total provincial structure are identified by Hartrick and Downey in the preceding diagram. Using the diagram as a guide and incorporating the author's views, it is possible to identify the key levels in the provincial system. The main concern is with the political master who is the Minister of Education and the executive servant which is the Department of Education. The distinction lies in that the former is an elected position whereas the members of the Department are not. In what follows an attempt will be made to explore the implications of this relationship.

The electorate of the province of B. C. It is probably better to avoid reifying social reality by changing the diagram in this area to read Minister of Education. Since it is difficult to precisely state the instrumental function of the Minister in the running of the organization* he is better understood as a symbol. As a symbol he can be praised or denounced in the political process for all matters connected to free public school education, i. e. taxes that are going up and the shortage of buildings. He also serves to reassure the mass public that they are participating in the selection of teachers, of texts, and the making of policies in an

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* Hartrick and Downey simply ignore him.

enterprise which affects their children.*

The Department of Education. The Department de-
rives its authority from the provincial government and had the func-
tion of setting board policies and minimum educational standards
according to the Report. (p. 10) To accomplish this function, the
Department has control of the following:

1. Interpreting and administering the School Act for
the purpose of supervising all schools in the Province.

2. Issuing certification to teachers; conducting grad-
uate exams for grade twelve students; authorizing textbooks and
programs of study; and issuing instructions regarding the nature
of school facilities.

3. Controlling the acquisition of land and the erection
of buildings by local boards. In particular, the Department has a
book in which such matters as the size of libraries is related to
the number of classrooms, along with the size of washrooms, staff-
rooms, offices, and so on. All plans must be approved by the De-

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* Interestingly, at the time of the investigation, the Minister of
Education held a double portfolio: he was also Minister of Labor.
Given the labor unrest that characterizes British Columbia, one
could reasonably speculate that much of his time would be occupied
in this area and therefore he would tend to let Department officials
maintain the educational enterprise even more than is customary.
Then, too, the Premier had made himself Minister of Finance and
since the budgets for the education come from the Minister of
Finance, the role of the Minister of Education becomes even more
symbolic.

partment before construction can commence.

4. Appointing local superintendents. Every superintendent in the province of B. C. is an appointee of the Department of Education and is a civil servant. The City of Vancouver is an exception: it has the right by city charter to select its own superintendent.

It should be clear that the Department of Education exercises considerable control over the affairs of local school districts. The most significant is the appointment of a District Superintendent, who, as a member of the Department's staff is expected to implement Department policies which may be incompatible with the policies of the local board. Further, as it was shown, the local board has difficulty implementing policies. From the inherent conflictual nature of this situation arose the central conflict in the Victoria organization.

The Local Organization. The dual aspects of political and administrative functions are repeated in the local organization. One could re-draw the diagram to show the two kinds of authority in two lines: the political branch which represents the mass public and is symbolized provincially in the Minister of Education and locally in the school board: the administrative branch is instrumental through applying what must be an interpretation of legal language by way of a local superintendent. Looking hard at

the structure it is possible to conceive of the Department as a

holding company with branch offices in all the districts.

An ideal formulation for a typical school district

would be illustrated as follows:

<u>Superintendent</u>

<u>Assistant Superintendent</u>

Director of Instruction (secondary)   Secretary Treasurer

Director of Instruction (elementary   Purchasing and Con-
                                           struction (Departments)
Director of Adult Education

Supervisors

Principals, Vice-Principals, Department Heads

Teaching staff

In the Greater Victoria School District, the members

of the administrative team were almost all products of the system.

(Report, p. 71) That is, the educational side of the organization

not only emerged from the teaching ranks, but from the local

teaching force. For example, the Director of Secondary Instruc-

tion had been a teacher, vice-principal and principal in the dis-

trict. Before his appointment as director, he had been the princi-

pal of the largest secondary school in the district. During the

period of investigation, he resigned and his position was taken by

a man who had been his vice-principal in the same school. Similar

examples would show that there existed defined routes to positions

of authority.

Perhaps the strongest example of what the authors refer to poetically as "inbreeding" is in the person of the superintendent.* The superintendent had been an educator in the district for forty-three years. He had been a student in the local schools and he had taken his teacher-training in the Victoria Normal School. In 1953 he succeeded Dr. J. F. K. English as District Superintendent of Schools for Greater Victoria. Dr. English moved upward into the Department to become Assistant Deputy Minister of Education a promotion that was never bestowed on John Gough who remained superintendent of the local district for 13 years. (Public Schools Report, 1965-66) It should be noted that the Victoria district is the senior district in the province for a superintendent, thus the next promotion would have to be into the Department.

Indications are that superintendent Gough was by-passed by the Department in promotions. An Assistant Superintendent of Education resigned in 1965 and his position was taken by a man with considerably less seniority than Mr. Gough. This man became a District Superintendent as recently as 1958, was promoted

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* The term is used in this passage: "To reduce in-breeding and the attendant ills of parochialism, efforts should be made to provide cross fertilization in thought and practice through the appointment to the administrative team of persons from outside the organization." (p. 69)

to the Department in 1964, and in 1965 succeeded the resigning

Assistant Superintendent of Education. In eight years, he rose

from a principal's position to the third highest position in the pro-

vince. Mr. Gough, by contrast, remained as superintendent in a

senior district for thirteen years. One of the immediate results of

this long tenure is that for thirteen years he appointed all members

of the central administration, principals, and vice-principals in

this district.

Downs explains internal promotions from a number of

perspectives. (72; 230-231) One point of view is that the superin-

tendent would look for the quality of personal loyalty in his sub-

ordinates in terms of a general loyalty capability. This value is

useful in the promoting of policies. And since the superintendent

would favor a continuation of his policies rather than a break in

tradition, he would use his screening perceptions to reject radicals

and promote a relatively homogeneous group around him. External

promotions to key positions would also arouse resentment among

the members who would tend to favor internal promotional policies

as a means to eliminating external competition. Probably there

existed in Victoria a relative uniformity of views extending down

from the central administration through the principals.

Setting. This uniformity would necessarily be har-

monious to the setting. Most organization theorists today stress

the influence of the empirical setting in which the organization is imbedded as having a reciprocal effect on the behavior of the organization. This being so, one should weigh the implications of the Victoria area carefully in coming to understand the organization. The future of the Greater Victoria area lies in its continued development as a retirement center. (Regional Survey of British Columbia, 1965)

Victoria is an ideal retirement center. Also it has a cultivated British atmosphere which has proved beneficial for the growing tourist industry. People come from all parts of Canada and many parts of the world to visit and to retire in the area. One attraction is the climate -- it has the highest record average sunshine hours for the province, a low precipitation, and mild temperatures. Golf, lawnbowling, and shuffleboard are year round activities. Accordingly, the population is well saturated with retired people, although the only figure provided by the regional survey is for those 65 and over. This latter group equals 21% of the population, a percentage higher than that of any other city in Canada.

Closely related to this retirement factor, a major source of income for the area is pensions and investments. Income recorded from investments for the area were the highest recorded in Canada in 1961.

Another major source of income for the area is from

service industries. Victoria is the capital of British Columbia and
therefore has a large civil servant population. Indeed the largest
payrolls for the area are those of the federal and provincial govern-
ment employees.

The foregoing has significance for the following rea-
sons:

(a) the retirement orientation of the area will tend to
influence the organization's objectives and those people in the or-
ganization in terms of aspirations.

(b) the civil servant population will influence the or-
ganization towards conservatism and insularity in education. Not-
able, too, is the merging of a civil servant as superintendent with
the dominant caste of the environment.

(c) the presence of the Department of Education and
the Minister of Education, both within the area, almost certainly
has some psychological effect on the organization.

It follows that the "interstitial" position of the board
becomes a key factor. In a school organization such as Victoria
which might be thought of as undergoing a process of encouraged
behavioral drift by way of its setting, an individual trustee can
flow with the process or oppose it. He can be a change agent; he
is outside disciplinary radius of the administration with whom he
is almost bound to collide; and he has the legal, fiscal, and com-

munity authority to impose legislation, i.e. hiring administrators from outside the district.

Moreover, the community was not static particularly in terms of a growing population. Between 1956 and 1961 the population of the Greater Victoria area increased by 12.8 percent, compared with the Vancouver Island increase of 13.4 percent and the provincial average of 16.5. (Regional Survey of British Columbia, 1965, p. 345) This was accompanied by a surge in the building of single dwellings, apartments, and high-rise apartments. Hartrick and Downey note the changes in the area:

> "Other analysists would argue however, that the
> Victoria area is, in fact, changing very rapidly.
> They cite as evidence an increase of more than ten
> percent in population over the past five years, a
> rapid increase in growth of the school-age population,
> and rapid industrialization of the area, with its at-
> tendant influence upon the character of the community.
> These enthusiasts look forward to the day, in the not
> too distant future, when the Greater Victoria Area
> will not only be a haven for retired people but also a
> bustling productive metropolis." (Report, p. 6)

While there is no evidence of rapid industrialization, nor was such a prospect apparently to occur, nevertheless the growing population meant expansion in the schools and concomitant problems in coordination for the administrative group.

PUPIL ENROLLMENT: VICTORIA AREA					
1961	1962	1963	1964	1965	1966
22,843	23,884	25,237	26,812	28,215	29,340

Source: Public Schools Annual Report, 1961-1966

And while the central administration did not expand in members,

the expansion was occuring at the administrative level of the princi-

pals. Related to the expansion and growing population, one could

say that there might have been a changing social composition in

the area. This would be significant. It would reflect in the compo-

sition of the board, changing the political structure. However these

matters are speculative in terms of depth of change. The Regional

Survey of British Columbia is quite definite that the future of the

area lies in retirement and tourism.*

In truth, there did occur a significant change in the

composition of the board. However, there was little accompanying

accommodation on the part of the superintendent. These matters

gave rise to the investigation and they are discussed in the follow-

ing section.

III. The B.C.S.T.A. Convention

Changes in the Local Board

In 1961, the nine member Victoria School Board under-

went a change when two incumbent members were defeated at the

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* The speculative nature of the political and social changes in the
area possibly account for the use of "other analysts" and the in-
determinancy of the Hartrick-Downey statement. Then too, one
should remember, they probably sought to be cheerful about the
educational prospects for the organization. The alternative was
to accept the implications of retirement.

polls and their places taken by political activists. Both men have used the school board as a stepping stone towards provincial politics, though unsuccessfully as neither were elected. Two polar types in political theory are the "agitator" and the "negotiator." (Dahl, 1963, p. 88) Pure types seldom occur; however, it seems likely that one of the trustees, Peter Bunn, is closer to agitator than negotiator.

An agitator serves a valuable role by rejecting the short run solutions and compromises of the negotiator. Most school trustees are people concerned with an acceptable working relationship with the superintendent rather than "rubbing the fur the wrong way." By attacking continual short run peaceful solutions which may only be storing up trouble for the future, an agitator paradoxically may be guaranteeing peaceful solutions in the long run. (Dahl, p. 89) Besides, the educational system has traditionally operated from its preferred style of politics: avoiding conflict, avoiding an open area for debate, it prefers consensus building, by persuasion. Consider the implications for peaceful adjustments in the statement by one of the educators:

> "A milder and more acceptable synonym for authority is leadership: leadership is the exercise of the authority of knowledge as opposed to the authority of law. This broader definition will perhaps reduce the shock of my contention that superintendents are authority figures quietly but persistently seeking ways and means of consolidating and extending control within their districts." (T.C. Byrne, 1968, p. 139)

Such is the rhetoric of the profession. However, after many years

of quietly controlling a school district, the Victoria superintendent

found himself confronted by an agitator who had the legal power to

enforce decisions on the organization.

Peter Bunn is a man for whom politics is a sport.

His father before him was active in politics and he feels that poli-

tics has been a natural part of his life. Bunn came from England

and settled in the Victoria area as a small contractor, specializ-

ing in renovations. He is also a socialist in an area that is pre-

dominantly conservative, and in fact, the ruling party in govern-

ment is conservative. Probably the school board served as a use-

ful vehicle for embarrassing both the Department of Education and

the provincial government. Bunn made good copy for the local

education reporter particularly through colorful declarations in

the local press.

The second trustee elected in 1961 was John Porteous.

He is a hospital administrator and he has also run for provincial

office in the government. Bunn and Porteous formed an effective

coalition in a tug-of-war with the superintendent that continued to

the investigation.* Both men, and eventually the whole board,

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* Out of the dramaturgy of one school board meeting reported in
the local press, in which the superintendent had just rebuked John
Porteous, the reporter observes: "Unchastened, Mr. Porteous
stood by his statement, and other members of the board backed
him up." (Daily Colonist, May 22, 1966) The statement was a
charge that the central administration had been empire building.

became consistently unwilling to accept what they considered "glib reports" from members of the central administration. Instead, they prodded and probed the directors and supervisors as well as the superintendent for information regarding the implementation of board policies. In effect, the trustees began to literally operate from their legal role by making policies and by wanting to be involved in the evaluation of these policies. Board meetings became a political arena.

Response of the Central Administration

Few administrations in a bureaucracy could bear much intensive scrutiny. Central administrations within a school district are no exception. A superintendent and his senior officials must sometimes make mistakes and take short-cuts under the pressures of the moment that would be difficult to justify to trustees when the pressures have later dissipated. Moreover, they will sometimes make avoidable mistakes that must be covered up if they are not to appear as incompetent to the trustees, as well as the public. School board meetings are public meetings and the exposure of mistakes is transmitted through the local press, with or without explanations. And education organizations, because of the nature of their task, are extremely sensitive to scandal on which the local press depends in order to sell newspapers.

Related to the pressure of time effecting decision-

making are the personal values of those who make the decisions.
Roles cannot really specify the values operative in a decision. One
needs to allow for the self interest of the official as well as the
psychological predispositions that he brings with him to the posi-
tion.

Teaching generally emphasizes "commitment" for its
membership which involves deeper and more fundamental beliefs
than normally required in organizations. Often the emphasis on
commitment as it appears in educational journals can be likened to
a religious calling for a Jesuit. This commitment becomes impor-
tant in discussing the central administration insofar as Downs be-
lieves that a shift occurs which makes officials even more com-
mitted as they enter the upper levels of the organization. (p. 67)
In short, teachers would regard the objectives of the organization
in an intensively more fervent manner as they progress upward
through the hierarchy. There are three reasons that support this
shift in behavior does occur for an official in the central admini-
stration.

First, the member of the central administration has
a great and more visible influence on key policies. Second, he is
likely to regard the organization's task in a near sacred manner
and resent as a foreign intrusion the impositions of trustees. Yet
in the legal model, he is a servant of the trustees and therefore he

is expected to obey their policy directives whether he agrees with them or not. Obviously he will resist and his resistance will take many forms even to agreeing in board meetings and hoping that trustees subsequently forget their suggestions. Third, decisions within the central administration rely on personal judgment, personal experience and bargaining power and none of these can be covered by the rules. It would be impossible for the superintendent to fully control or to be fully informed about the behavior of his subordinates. However, the group does face a common threat in the form of a board which tends to reinforce their collegial loyalties, and their personal loyalties in presenting a united front.

In effect, the Victoria trustees tangled inside the personal structures of the central administration. It is these informal structures that satisfy personal needs of the officials. Both the formal and informal structures contribute to the established processes underlying the behavior patterns of the officials. (Downs, p. 195) These processes represent a considerable investment in time, effort and money. Thousands of decisions, including mistakes, serve as a form of "sunk costs" for the individual official, for the group called a central administration, and for the organization. This past investment forms a web of moral behavioral, psychic, and economic relationships and it is in this web that the trustees tangled themselves.

The response by the superintendent to the growing
confrontations aggravated the situation. First, he excluded the
press from the meetings. He accomplished this by shifting the
public meeting into a committee of the whole at 8:20 p.m. every
board meeting. Besides alienating the press, this tactic encour-
aged the creation of a direct communication channel between at
least one trustee and the education reporter. Second, he responded
to a growing tension level at board meetings by a decree that no
other official was to reply to the board but himself. Third, in
policy matters he simply avoided presenting alternative possibili-
ties to the board, i.e. in the selection of a principal, he presented
only one name for consideration. As one trustee explained, they
were permitted to talk from that.

In discussing the character of the man Gough with
those who knew him, one quality invariably was mentioned: integ-
rity. He was described as a disciplinarian accustomed to con-
trolling the organization (including the trustees) with a firm hand;
as a conservative, in politics, in matters of education, and in
ideas on educational change. He has also been described as a
painfully shy man. Now it is certain that there are times when
virtues become vices, as for example when integrity is simply
stubborness. Studies by Gross and his associates (1958) show the
need for a manipulative superintendent. The studies are interest-

ing if only because they reveal that Gough operated at least ten

years behind recognized practice. Integrity is a perceptual and

relative judgment. Integrity in a superintendent's behavior can

only be seen in terms of the total role as he interacts with school

board members, teachers, students, parents and members of the

central administration. Since it was members of the central ad-

ministration who considered him a man of integrity and members

of the board who considered him stubborn, one might assume that

Gough had been shielding the officials from the thrusts of the

board. Whatever the case, Gough was dealing with politicians in

a political arena where integrity, shyness, conservatism are in-

compatible characteristics. In brief, he could not cope.

The B. C. S. T. A. Convention

The trustees of the Victoria Board resolved to have

rid of the superintendent. This would be through promotion up-

ward to the Department, through having him fired for incompetency,

or by forcing him to resign. However, as laymen in a professional

organization, they were aware that no one would attach any great

weight to their opinions. But there did exist a unanimous feeling

among the nine member board that Gough had to go. In the way

that forces of circumstance have of appearing fortuitious but in

reality develop from the needs of individuals, the Victoria trustees

learned of the methods for achieving their goal.

At a B. C. School Trustees Association leadership
development convention held in Parksville, Vancouver Island
(April 30, May 1 and 2, 1965), the underlying theme dealt with the
removal of superintendents and principals as part of a need for
introducing changes in a district.

Dr. Hartrick presented an address on selecting an
administrator. He described a study that had been made in the
United States where it had been found that the selection depended
on: "what the individual school board wanted and saw the need to
be." Further, the school board needed advice at hand in order to
judge and assess the situation. A second speech by a high school
principal dealt more directly with removing principals as a first
step towards introducing change agents into a district. He ob-
served that boards can remove people who are operating ineffic-
iently but that they do not choose to do this. "They do not, or they
very infrequently remove superintendents or ask for their transfer."
He made two other points that would have relevance to the Victoria
trustees attending the convention:

1. The selection of a principal should not be made on
the advice of a local superintendent alone, because: there are
pressures for picking a local man from teachers' groups; superin-
tendents are under these same pressures; and most superintend-
ents lacked the qualifications to choose a principal.

2. The selection of administrators in a district should be done with the help of an administrative evaluation team from the university. Basically, this meant outside consultants.

Clearly these were powerful and suggestive cues for the Victoria trustees. They learned from the convention that professional educators considered it desirable to advertise outside the local district for new principal. This had not been their experience in Victoria. They learned that it was not considered desirable practice to rely on the judgment of their superintendent. They learned that outside consultants were available to give them professional advice. Finally, they were assured that it was quite legitimate to have a superintendent removed from his position.

Following this convention, these trustees who attended returned to the Victoria area and communicated this information to the other board members. At the Annual General Meeting of the B. C. School Trustees Association held at the Bayshore Inn in Vancouver during the first week of October, the delegates from Victoria proposed to Hartrick that he make a study of the Greater Victoria School District, to begin in January 1966. Interestingly, so far as it is possible to determine, the first the superintendent knew of the study was after the arrival of Hartrick and Downey in Victoria. Probably it came as a surprise.

IV. Concluding Remarks

This chapter has attempted to show that the origins of the investigation come from a very basic dilemma for school organizations in which trustees have the legal power to enforce decisions while the administrators have the knowledge. This is a vexing and continuing problem in education. The chapter has also tried to make clear that where a superintendent is unable to manipulate the politicians so that they are content in ratifying decisions, the structures of the organization are probably unable to accommodate to active trusteeship.

Clearly there are two purposes in the appeal for outside help. For the trustees, the objective was to rid themselves of the superintendent. The content and form of the investigation was not particularly of concern to them and in this regard I am reasonably sure that none of them bothered to read the report from cover to cover. Probably the major part of their objective was accomplished with the actual fact of the investigation.

For the investigators, however, there are indications that they took their task seriously enough in terms of creating an ideal organizational structure. Therefore the main thesis that they were detached enough and knowledgeable enough to proposed major departures from the status quo is still applicable.

CHAPTER III

NATURE OF THE INVESTIGATION

INTRODUCTION

Mouzelis makes some observations about the state and
perspectives of organization theory which are useful springboards into
the next two chapters. It is well to remember that Hartrick and Downey
were representatives of a discipline called educational administration.
It is a department within a teacher training faculty that concentrates its
attention on organization theory. Whatever theoretical developments
have occurred in organization theory over the past decade, and Mouzelis
argues that there has been an "intense intellectual activity," (p. 145)
should have had a reciprocal influence on educational administration
theories. At present the whole field of organization theory is in a state
of accelerated growth; there has been an impressive volume and variety
of contributions; there has occurred an interchange of ideas and methods
as more and more social scientists from other disciplines become in-
terested in organization theory while those already engaged in organi-
zational studies have freely chosen the moods and metaphors from other
disciplines. And the important theoretical trend, according to Mouzelis,

seems to be a broadening of scope which definitely shifts the focus of attention from the individual and the group, to the structure of the organization as a whole. (p. 145)

Within this broadening of scope it is possible to identify two theoretical positions taken by theorists towards the behavior of people in organizations. The first emphasizes the system and integrative aspects while the second emphasizes more the aspects of conflict and division. The distinction is made between the value integration and the power-conflict outlook in the literature but, of course, the two ways of looking at an organization are neither contradictory nor clearly distinct in organizational writings. (ibid. p. 164) These perspectives are of importance in terms of the Victoria study. It is not that one seeks to fit Hartrick and Downey into one category or the other but rather that one needs to understand their emphasis in the organizational reality they constructed in order to grasp the problem as they saw it as well as the solution they proposed. From this context the concern of this chapter becomes one of understanding an ideal image that Hartrick and Downey established as a methodological device against which they could measure and describe the prevailing situation in the Victoria organization. (Report, p. 4) The following chapter continues this discussion by considering the problems illuminated by this image of the organization and the recommendations designed to shift the organization closer to the ideal.

Section one of this chapter seeks to establish the ideal

image that Hartrick and Downey used in their study. Section two will

elaborate this theme by demonstrating that the actual model used by

Hartrick and Downey was that of Talcott Parsons, by elaborating the

Parsonian framework and by considering the implication of using

Parsonian theory specifically where it influences the investigation.

Section three looks briefly at an alternative approach that the investi-

gators might have taken in their perceptions of the organization. This

will be done by presenting the basically different starting point taken by

Anthony Downs into how people behave towards each other in organiza-

tions. It is hoped from this discussion that the emphasis in the Hartrick-

Downey Report which is discussed in the following chapter will thereby

become more intelligible.

I. The Image for the Investigation

The Social Analogue

One of the more common images that organization theo-

rists use is that of an organism, or more specifically, that of the human

body.* Downey illustrates this usage:

> "In organizational therapy, perhaps the most perplexing
> phenomenon to be encountered by the therapist is the in-
> herent indifference of organizations to anything new or
> unusual. In this respect, organizations are rather like
> individuals. The older they grow, the more fixed they be-
> come in their ways and the less inclined they are to view
> change with enthusiasm." (p. 200)

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*I am indebted to a discussion by Walter Buckley, (1967, pp. 8-36) for
this portion of social system models. Other theorists are acknowledged
in the customary manner.

The analogue is part of what has come to be known as modern functional analysis operating in social theories. It leads to a sequence of four inter-related steps that form a methodological model of procedure. (Merton, 1967, p. 41) First, the theorist defines certain functional requirements for the organism which must be satisfied if the organism is to survive and to operate in any way. Second, there is a concrete description of the arrangements (structures and processes) through which these requirements are typically met in "normal" cases. Third, if any of the parts are malfunctioning, the theorist is sensitized to the areas and guided in the search for compensating mechanisms. Fourth, the image enables the theorist to provide a detailed account of the structure for which the functional requirements hold as well as the arrangements through which the function is fulfilled.

If the school system is like a human body, then the central administration may function like a brain and the decision processes may be likened to a nerve center. As with the human body, the elements in the organization are considered as functioning parts of the whole: that is, they are mutually complementary, interdependent, and co-operative. It is a useful ordering device. There are some disadvantages, however, in thinking of organizations as if they were individuals, or in using the organismic analogue. One problem lies in the concepts of health and sickness which encourages the terminology of an organizational "therapist." It is quite easy for a therapist investigating an organization to view disturbances in the system as a sort of disease. In

this way, students, teachers and parents who are today seeking more of a say in the decision processes may be regarded as a disruptive and therefore unhealthy symptom in the organization. Moreover, if the indifference of the organization to change requires therapy, then an organization undergoing some conflict through innovation can also be thought of as requiring therapy.

A second image that often has its components intermingled with the organismic analogue has been derived from social physics. The mechanical model has its origins in the rapid advance of physics, mechanics, and mathematics in the seventeenth century. The same methods, concepts, and assumptions were applied to man, his mind, and his social system in keeping with a mechanistically interpreted universe. Its terminology commonly includes notions of "inertia," "social forces," and "system in equilibrium." The concepts of both analogies tend to merge when a theorist speaks of a system in equilibrium and then uses a biological illustration of homeostasis--temperature regulation in animals. However, the main problem with the image is that theorists tend to construct a view of an organization that is rife with anthropomorphism and teleology. The system "seeks" equilibrium; it has "problems" and "imperatives" of control; it has systemic "needs." Downey illustrates these matters:

> "One notable characteristic of the typical organization
> is its tendency to seek a state of equilibrium. That is to
> say, the organization strives to establish a kind of pro-
> gressive balance. It attempts to formalize regular pat-
> terns of progress; it routinizes behavior of its members;

> and it conditions itself to preserve established institutions. Having achieved this state, the organization is said to be in a condition of 'no change.'" (p. 201)

Downey continues this mechanistic imagery when he describes the

forces of habit pushing against the forces of things new as the "geo-

metric resultant of the two force vectors." (p. 201)

It is possible and useful to draw both of Downey's images

together at this point and state them in concrete terms. Instead of

saying an organization is like an individual, one can say that a school

district is like a superintendent, who is an authority figure "quietly

but persistently seeking ways and means of consolidating and extending

control" (Byrnes, op. cit.) within his district. It is now possible to

render the teleological overtones of Downey's second statement more

respectable by saying that a superintendent strives to establish a state

of equilibrium, seeks to formalize regular patterns of progress,

routinizes the behavior of his subordinates, and thereby preserves the

status quo. In this sense, deviance becomes a normative concept

relative to the superintendent who is a reference point for the organi-

zation. In truth, the superintendent is identified, for all intents and

purposes, as being the organization in the ideal conception of a school

organization presented by Hartrick and Downey:

> "As one attempts to establish a conception of an ideal organizational structure, it is helpful to begin with the notion that, were it possible, all administrative tasks would be performed by one person.

> "This is not an unreasonable starting point, for it is a fact that ultimate responsibility and authority for the

performance of all tasks are (or should be) vested in the
person of one man: the chief executive officer.

"However, because in a large organization the adminis-
trative task is too burdensome for any one individual to
bear, the conception must be expanded to incorporate the
notion of a team of administrators rather than an indivi-
dual administrator. Yet the concept of unity or singular-
ity can, and should be, preserved. For if the team is
organized effectively and if it operates smoothly, mem-
bers will function as though they were, so to speak,
extensions of the chief administrator.

"Ideally, an enterprise should be characterized by an
organizational structure that is designed to achieve this
kind of unity. " (Report, p. 50, italics mine)

Thus emerges the image of the superintendent as a refer-

ence point for the health and well-being of the Victoria school system.

In this sense, he becomes the social equivalent of the organizational

therapist's image of a functioning organism against which he can

assess normality and abnormality, health and disease, and thereby

identify the problems in the organization. Instead of saying that the

organization is rather like an individual, Hartrick and Downey make

the shift in practice so that the superintendent is the organization.

Now it is reasonable to say that as superintendent Gough had grown

older, he had become more fixed in his ways, and was less inclined

to view change with enthusiasm. In Downs' terminology, Gough would

be a climber who had become a conserver interested more in holding

on to what he had than in expanding the scope of his activities. How-

ever, the image obscures important perceptions of the organization.

Unfortunately this is an ever present danger when one becomes en-

tranced in descriptive exercises. First, a superintendent as a mature

organism cannot change his given structure beyond very narrow limits
whereas the structures of an organization are capable of being changed,
and changed quite radically at times. For example, the government
of the province in 1968 introduced a new finance formula into the edu-
cational system. It was intended to control spending in the educational
enterprise and its effect, on an industry noted for innovating once in
fifty years, has been a more creative look at where resources are be-
ing used. Thus, whole levels of bureaucracy between the superinten-
dent and the schools are presently being abolished in some districts--
a structural change outside the scope of mature organisms. Finally,
the emergent roles of the superintendent and of the principal indicate
that one needs an image that allows for structure elaborating features
as well as structure maintaining features more in keeping with the
biological level of men in organizations.

However, the concept of unity and singularity which
Hartrick and Downey wished to preserve accords well with the thinking
of Talcott Parsons. Parsons derives his model from a paradigm of
a personality. His work is judged by Mouzelis to constitute the most
elaborate attempt to provide a really sociological framework for or-
ganizational analysis. (p. 149) He is one of the sociologists who has
contributed to the broadening of scope in organization writings and,
indeed, his theories on organizations may be regarded as the test of
his general theories on the social system. Parsons entered educa-
tional administration through a contribution to a collection of essays

edited by A. W. Halpin (1958). His model has been well received in

educational administration; his influence has been noticeable and is

growing, possibly because no established theoretical position exists.

(Landsberger, 1961) These matters are expanded in the following

section.

II. The Model for the Investigation

Uses of a Model

Deutsch (1952) defines a model as "a structure of sym-

bols and operating rules which is supposed to match a set of relevant

points in an existing structure or process." (p. 353) A model must

be used to discuss an organization and much of the fruitfulness of the

Victoria investigation was dependent on the degree of similarity or

dissimilarity between the model and the organization itself. The

question that arises is one of how Hartrick and Downey perceived the

whole organization, and of the model that enabled them to account

systematically for its structure and problems. Their contribution to

this question is not very helpful:

> "The ideals that have been adopted here have come from
> a variety of sources. In some cases, the ideal has been
> constructed upon legitimate research evidence--and,
> hence, constitutes an empirically validated image of
> 'what could be' in education. In other cases, the ideal
> has resulted from a synthesis of what appears to be the
> best thinking of scholars--and as such, represents an
> image of 'what ought to be' in the view of experts in the
> field. In still other cases, the ideal has grown out of
> comparative analyses--and so, constitutes an image of
> 'what is' in most other school systems in the country."
> (p. 4)

The term "ideal" is being used here in two senses: first, as an image drawn from the organic and mechanical analogues and which in turn suggest similarities with the observed organization and, second, as a set of assumptions which are used to circumscribe and isolate a number of inter-related processes. Of course, the two senses are closely related. To theorize about an organization requires linking a number of assumptions that form the content of organizational theory, but to do so requires the use of a physical or biological analogy in thinking about social reality. A model provides the conceptual framework within which organization theories are fitted; a model also provides a way of looking at the organization and of interpreting the problems in it.

The four sections in the Hartrick-Downey Report--the partnership, the school board, the central administration, and the schools--indicate clearly enough that Parsons' model was used in the investigation. * These four sections correspond to the four levels of hierarchy that Parsons claims exists in all organizations. It is felt that by understanding Parsonian theory, by establishing the concepts in the model, and by considering criticisms advanced by scholars on Parsonian theory, that some light will be cast on the approach taken by the investigators towards the organization. Accordingly, the immediate task is to establish the nature of Parsons' model.

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* This point was confirmed by Hartrick.

Parsons' Model

Parsons views society as a social system. Within this system there are an infinite number of interconnected sub-systems that, taken as a whole, form the larger system. Organizations are simply another social system. It was therefore possible for Parsons to apply his theories of men in society to men in organizations without altering the content, and in truth, his entry into organizational studies serves as a test of his general sociology. The point is significant and has been emphasized here because of a common terminology that one uses in Parsonian theory as one shifts from society to organizations. Since organizations are sub-systems in society the same basic processes and structures apply in the model.

Parsons draws his basic image from an organism and therefore creates a social analogue in the manner explained in the previous section. That is, the organism defines certain functional requirements that in turn are used to define functional requirements which an organization must meet in order to survive and operate in a normal way. There appear to be three basic components in the model: 1) action theory, 2) functional imperatives, and 3) levels of hierarchy. All three appear in the following statement which is perhaps the clearest statement Parsons has made on these matters:*

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* Parsons made this statement in reply to his critics and both criticism and reply are contained in the Max Black (1961) edition on the theories of Talcott Parsons. It is an invaluable text for both presenting critics' views while enabling Parsons to reply directly to them.

"...action theory is concerned with the analysis of aspects of the behavior of living organism; particularly that phase which involves the control and direction of such behavior through culture level symbolic systems and the organization through which that control is implemented. There are two points at which the assumption becomes essential. The first is that it establishes basic continuity with the biological world. Action is essentially a level of organization of the phenomena of life which can be presumed to have emerged in the course of evolution. The second point is to draw the line vis-a-vis physical behavior. This is not, as such, action in the analytical sense, but is controlled by action processes. ...there is a plural hierarchy of sub-systems of action, other than within social systems, namely the behavioral organism, the personality of the individual, the social system generated by the interaction, and the cultural system organized about patterns meaning. This set is arranged in a hierarchy of control in the above sense, from lower to higher in the order stated." (1961, pp. 326-7)

Parsons goes on to say that within this basic paradigm there are functional limits to variation, that there are ranges of tolerance, but that beyond these "processes of fundamental change, including dissolution, will be set in motion." (p. 327) Finally, he notes that the concept of function used in his works corresponds to the concept of homeostasis as expressed by W. B. Cannon. (p. 327)

The four sub-systems of human action--the organism, personality, social system and cultural system--serve as the major analytical tool by which Parsons analyzes any action system. It appears to be used both as an ordering device as well as for defining functional needs. It enables Parsons to conceptualize social reality as a complex of interlocking systems ranging from the individual to the whole society. As with the individual, society has four sub-systems:

1) the maintenance of the highest governing or controlling patterns of the system, 2) the internal integration of the system, 3) its orientation to the attainment of goals in relation to its environment, 4) its more generalized adaptation to the broad conditions of the environment. (Parsons, 1959, pp. 3-16) These levels extend from the most highly unified at the top, to the most highly differentiated at the bottom. At the bottom, the social system is rooted in the concrete individual who contributes to society through various roles. At the top, the cultural system institutionalizes the norms that make social life possible and the values that under-pin them. The underlying systems of values influences the particular set of norms which operate in any institutional sphere. All institutions, therefore, tend to be integrated through their conformity to basic value orientations. Thus, at the bottom of the plural hierarchy are what has sometimes been referred to as "the masses" those many millions of people all highly differentiated but held together, according to Parsons, by a common value system which comes down from the top in the form of a common culture.

Applied to organizations, the paradigm enables Parsons to define four levels to be found in all organizations as well as four functional needs that all organizations must solve if they are to survive. The four levels of organization as they are conceived by Parsons can be shown in this way:

PARSONS' MODEL	HARTRICK-DOWNEY REPORT
Political entity	The Partnership
Fiduciary Boards	Board of School Trustees
Management Level	Central Administration
Technical Level	Schools

Taking the provincial public school system as the referent, the political entity is the voting public who elect the minister of education; in turn, he appoints the members of the Department of Education who administer the schools. Taking the local school organization as a system referent, the people of a community elect a school board which should set policy in agreement with the values of the community. In turn, the members of the central administration execute the policy in the organization. The levels define the four basic functional requirements that school systems must solve in order to survive; adaptation, integration, goal attainment, and pattern maintenance.

Adaptation refers to the supply of human resources (students, teachers, administrators) and to material resources (land, buildings, supplies). At this point it is necessary to consider how Parsons views the function of public schools in terms of why they should receive these human and material resources. Parsons made a foray into public school education through an article titled: "The School Class as a Social System: Some of Its Functions in American Society." (In Halsey, Floud, and Anderson, 1961, pp. 434-455) It has two functions, according to Parsons: the first is to internalize in pupils commitments and capacities for successful performance of

of their future adult roles; the second, is to allocate these human

resources within the role structure of society. Basically, he sees

the schools as an agency of socialization. The feminine role is

anchored in marriage and the family although, Parsons observes,

some might object insofar as this prevents society's total talent re-

sources from being distributed equitably to business, government and

so on. * (p. 435) Presumably, then, one can say that the schools are

financed because they provide society with trained manpower. Fur-

ther, that a mother permits her child to be institutionalized because

the values of the school are in harmony with her own, the school will

socialize her child, and the school will provide him with a role as an

adult.

The goal achievement sector corresponds to the level of

fiduciary boards. It is where the resources are fitted to organiza-

tional goals, or the means are fitted to the ends. The trustees occupy

this sub-system and in keeping with their interstitial position in orga-

nizational space, they are charged with interpreting the values of the

community into the organization. It is in this sector that Parsons

places the decision-making processes: policy decisions which are

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* In fairness to Parsons it should be noted that he wrote before the
birth of the women's liberation movement. Secondly, there is a de-
bate among educators that hinges on the words "education" or "school-
ing, " the latter being more readily identified with socialization. De-
pending on which side of the fence you are loyal to, it is possible to
argue that Parsons is concerned with only two of many functions the
schools perform, or that he is simply being realistic in accepting the
socializing function as the function.

concerned with organizational goals; allocative decisions, which refer

to the distribution of funds and resources; and co-ordinative decisions.

It is also the area in which Parsons places organizational power defined

as "the capacity to mobilize resources in the interest of the attainment

of a system goal." (1956, p. 228)* A superintendent, however, can

share this power insofar as Parsons conceptualizes organizational

reality as a complex of interlocking sub-systems: one of the inter-

locking components, between the board and central administration, is

the superintendent; another, between the central administration and the

schools is the principal. Educational administration holds to the

ideology of the superintendent/board relationship as being one of

shared decisions. Parsonian theory accommodates this belief.

The final considerations of the Parsonian model concern

the expected behavior of men in organizations. The organizational

member is thought of as being both an actor and a social object

simultaneously. Since there exists a multitude of interacting "units, "

or individuals in any organization, and since each of these "units" may

be pursuing different goals, the units must be directed towards the

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* Parsons viewed power in the Social System (1951) in more under-
standable terms. Power was "control over the actions of others. "
(p. 121) Individuals were given legitimate power as part of their
collective responsibility. Parsons shifts from concrete individuals
controlling others to the generalized notion defined above, to an even
more generalized notion in Structure and Process (1960) where it is
now defined as "the generalized capacity of a social system to get
things done in the interest of collective goals." (p. 181) This prob-
lem of indefiniteness in the use of power is considered more fully
in the critical section of this paper, particularly as it applies to the
model for the investigators.

organization's goals, in this case, by the trustees. The first functional imperative in the Parsonian organization is order; "a peaceful co-existence under conditions of scarcity." (Parsons and Shils, 1951, p. 180) It is therefore important in Parsons' model that when individuals and groups of individuals interact with each other, they do so in a co-operative manner. The basic interaction process is characterized in terms of the psychological concepts of alter and ego in which "each conforms with the expectations of the other('s) in such a way that alter's reactions to ego's actions are positive sanctions which serve to reinforce his given need-dispositions and thus to fulfill his given expectations." (ibid. p. 15) From this, Parsons holds that the system of interaction within an organization was capable of being analyzed "in terms of the extent of conformity of ego's actions with alter's expectations and vice versa." (ibid. p. 15)

Stated in concrete terms, Parsons has selected a co-operative relationship rather than a competitive one to explain how men behave towards each other in organizations. It is thus possible to say that a school board (ego) conforms to the expectations of a superintendent (alter) in a co-operative, harmonious way so that both function with a complementarity of talents. Similarly, this ideal interaction characterizes all members of the organization. It is now possible to look at the strength and weaknesses of the Parsonian model.

Criticism of Parsons' Model

One of the ways to understand the impact of the model on the Hartrick-Downey study is to select some of the criticism by various writers on Parsonian theory. However, a number of these criticisms owe more to ideology than to measured thinking and while they should not be ignored, neither should they be accepted without question. It should be remembered that Parsons sought to function as a sociologist by seeking to describe things as they were, not necessarily as they "ought to be." That is, he attempted to provide knowledge of existing situations, but how people used that knowledge, as in say social work, was not considered by Parsons to be within his domain. This type of criticism finds a range of expression from Hacker (1961) who speaks of Parsons' notions on political equilibrium as an acceptance of the status quo on the one hand and a cautious espousal of traditional liberalism on the other (p. 291-303) to Bottomore (1969) who dismisses Parsons' thought as being "willfully irrelevant." (p. 39)

Bottomore perhaps exemplifies the more devastating criticism applied to Parsonian theory.* Against the opinion that Parsons' contributions are irrelevant, one can place the observation by Mouzelis (1967) that in spite of the obvious inadequacies of Parsonian thinking on formal organizations, he has nevertheless shown

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* This is not to say that Bottomore applies the most devastating; perhaps that position belongs to C. Wright Mills, see especially "Grand Theory" in System, Change and Conflict, ed. by N. J. Demerath (N. Y. The Free Press, 1967, pp. 171-183).

what a general theory of organization should look like. He finds the

Parsonian framework instructive in three respects: 1) its capacity

to account for different levels of analysis and to point out intricate

problems of interdependence and autonomy between these levels,

2) its applicability to all types of organizations, not just to govern-

mental agencies and industrial enterprises which should help to des-

cribe the underlying similarities and the systematic differences be-

tween organizational types; and 3) its demonstration of the need for

closer links between organizational theory and general sociological

theory. (pp. 153-54)

William Foote Whyte (1961) discusses Parsonian theory

applied to organizations. Whyte does not find here an acceptable

theory of organization nor the basis on which a sound theory might be

built. He suggests that the student of organizations would profit from

Parsons' writings in analyzing the stance an organization takes to the

surrounding society and not in terms of guides to the internal behavior,

the internal dynamics, of an organization. Basically, the problem lies

in Parsons using such terms as "staff and line, " "decision making, "

and "span of control" without linking the concepts with observable data.

(p. 251-267) Landsberger (1961) also criticizes Parsons for his non-

systematic and often careless treatment of key concepts, and for his

lack of comparison with existing organizational writings. (p. 216)

Other criticisms are those concerning questions of change,

values, and power. Change in the Parsonian model is something that

happens when the expected relationships break down. Parsons recog-

nizes that structured deviance, tensions, and strains are integral

parts of an organization; nevertheless, the organization comes to be

identified with the dominant, legitimized, institutionalized structure.

In this case, Hartrick and Downey identify the structure of the organi-

zation in the person of the superintendent. It follows that the Parsonian

model has grave difficulties dealing with social change insofar as

change may be viewed as something that happens when the relation-

ships with the superintendent break down, rather than as a conflict

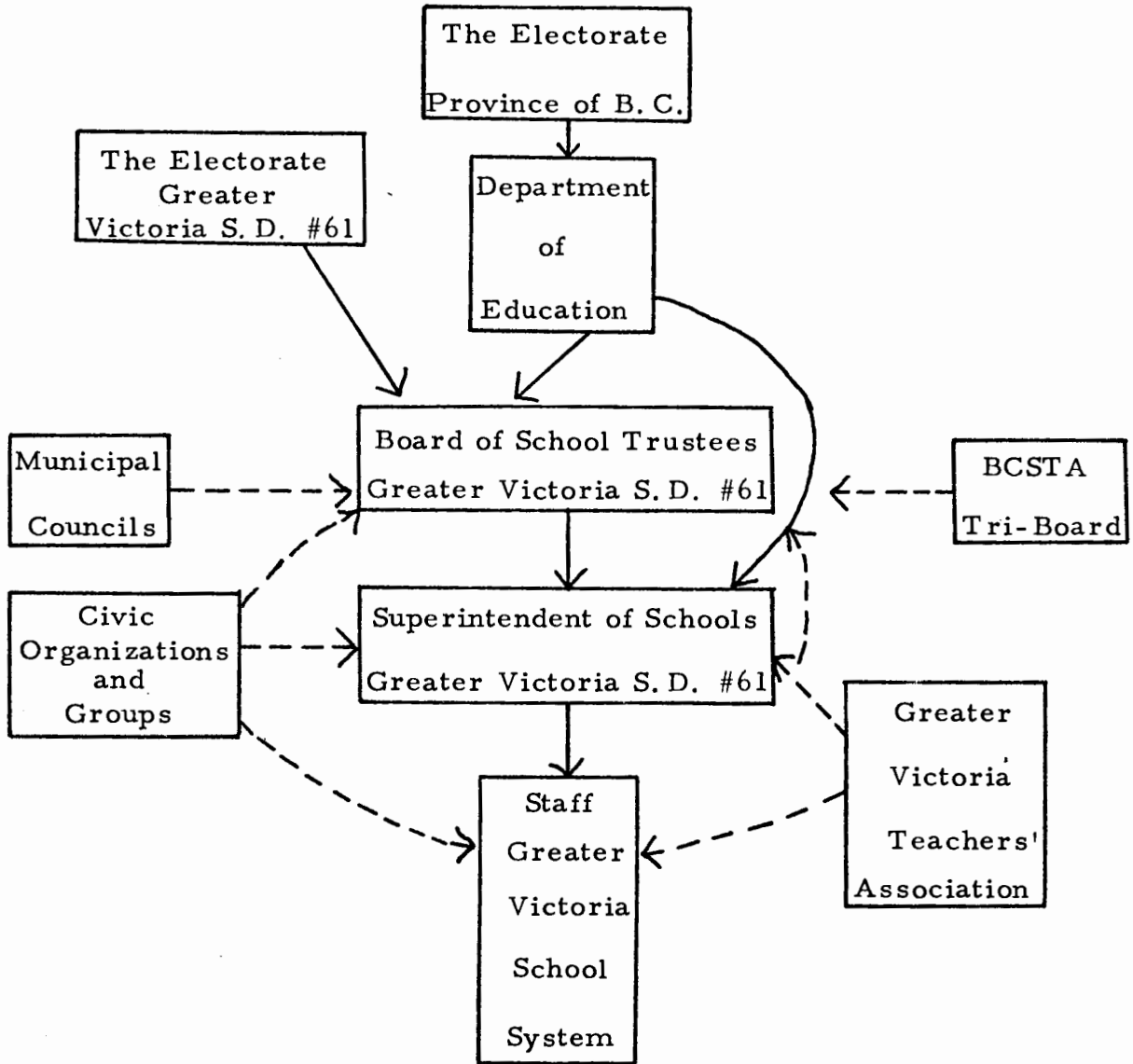that seeks to strengthen the established system. Buckley (1967)

explains:

> "Looking closely at Parson's scheme we see that his
> conserving orientation is built tightly into the model.
> The boundary of the system is defined in terms of "con-
> stancy patterns" that are tied up to a harmonious set of
> common norms and values, mutually supporting expec-
> tations and the like. Equilibrium, in turn, is defined in
> terms of the boundary-maintaining system of constant,
> harmonious, mutual, common, reciprocal patterns. In
> a word, the 'system' here excludes or includes only
> residually, structured strains and deviant patterns which,
> however, we know very well may be constant, mutual,
> and reciprocal, within themselves and to a great extent
> in relation to the dominant structure. " (p. 28)

A second problem concerns Parsons' stress on values.

Parsons does over-emphasize the importance of values and their con-

tribution to organization functioning. (Mouzelis, p. 156) The point at

issue is not to dispute the importance of values particularly in educa-

tional organizations where values obviously play a large part. The

issue arises for investigators who must determine a goal for the

organization if they are to determine the means whereby the desired

ends might be achieved. But in determining a goal, they must simul-

taneously ask the question of whose values the goal serves. Parsons

ignores Marxian analysis which would hold that the value of orienta-

tions are symbols relevant in their use to justify or oppose the arrange-

ment of power. (Mills, 1967, p. 174) Parsons ignores the possibility

that an elite might exist as a sub-system, independent of his four

functional sub-systems. (Morse, 1961, pp. 149-50) It is thus possible

that organizational values are not a kind of divine providence caring

for the welfare of all members but are rather an ideology which might

in fact legitimize and impose as general interest the narrow interest

of certain groups. For example, the Mafia functions as a sub-system

in a society and it gains legitimacy by using legitimate organizations

for its business transactions.

The significance of these observations for the Hartrick -

Downey investigation become apparent by considering again the dia-

gram that was used in Chapter II of this thesis and which was taken

from the Report:

Formal lines of authority

Informal lines of influence

FIGURE 1. --- The Partnership in Education

Here it is most evident that there are not four, but five levels, and

that the extra level or sub-system, is the Department of Education.

Using Marxian terminology, the Department may be viewed as an elite

sub-system. Using functional theory where the public school system is considered as a functioning organism, the Department may be thought of as a foreign growth in the body, for example, a tumor. The fault is not with Hartrick and Downey's diagram which is accurate enough in terms of the analysis given in chapter 2 of this study, but rather lies in Parsons' view of organizations which is not false but very partial. Parsons is not pre-occupied with questions of power but instead almost reifies social reality (the electorate of B. C. in the diagram) as the mysterious entity whose values control the system. Hartrick and Downey simply had to concretize these matters in order to discuss where the authority for a local superintendent came from. However, it should be clear because of this aspect that one needs to consider the role of the Department in the investigation. This is particularly true for the Victoria investigation because Board members had been declaring a state of non-co-operation with the Department and in fact had been embarrassing the Department. (Report, p. 18) Therefore, in bringing Parsons' model with its functional imperative of order into the Victoria system, Hartrick and Downey were most clearly aligned to the needs of the Department.

III. The Downsian Alternative

"...the most recent and interesting trend in organizational literature is a growing pre-occupation with the problem of social power and conflict. If nothing else, the numerous criticisms about the conservative bias of the human relations school have certainly had some

influence on organization writers. Whether they succeed or not, most of them are anxious to show their emancipation from the pro-management Mayoite ideology by paying more attention to organizational conflict. Thus, although the outstanding studies on this subject are not numerous, and although we are very far from an elaborated theory of organizational conflict, there is an increasing realization of its crucial importance for the comprehension of organization problems." (Mouzelis, p. 146)

One of the principal substantive issues in recent sociological theory has been the debate concerning the compatibility of two models: the consensus model and the conflict model. (Cohen, 1968, p. 166) A consensus model attributes to society the characteristics of integration, commitment, co-operation, and stability whereas the conflict model attributes to it characteristics of coercion, hostility, division, and change. The first emphasizes norms and legitimacy; the second emphasizes vested interests and power. The underlying concepts of the conflict model have been drawn from a number of theorists, among them Rex (1961), Blau (1964) and Homans (1964)

Rex observes that Parsons has concentrated on a theory

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* This anxiety is reflected in educational administration. Lane, Corwin and Monahan (1967) explicitly state that they are following a conflict model in their book as a contrast to the rational model: "The rational model is grounded in the biological model of society." (p. 40) Thus, they divorce themselves from men in society and in organizations. Moreover, they advocate the model by Parsons--a rational, biological, consensus model--as being "useful and appropriate" for educational organizations. (p. 335) Mouzelis calls this "homespun casual theorizing," showing intellectual laziness, and repeating in a confusing manner already existing ideas. It is to be hoped that the gentlemen in educational administration do their homework before releasing more texts using conflict models.

of one polar type with his ideal interaction stressing co-operation be-
tween men. Rex postulates the outlines of a conflict model, a model
that begins from the opposite premise by assuming two individuals with
conflicting aims. The achievement of these aims requires co-operation
of others as an individual looks for allies who will add strength to
whatever sanctions he can bring to bear against opposed individuals or
groups of individuals. Out of these alliances emerges conflicting
groups whose behavior toward each other may not be governed by
shared norms but may be determined by the success each group has in
compelling the other group to act in accordance with its interests.
(Rex, pp. 105-122)

In Blau's model, goods and services are given with the
expectations of equivalent returns--power emerges as an inevitable
and autonomous function of exchange. Compliance is no longer a result
simply of shared values and of a normal commitment to the norms of the
institution but it may also result from a control based on negative
sanctions. Superior power may come to individuals who can monopolize
resources and make others increasingly dependent on themselves.
Once power has been attained by furnishing services it can be sustained
by not furnishing these services, particularly if members in an organi-
zation cannot obtain these services elsewhere. (p. 197) Thus, power
becomes the ability of persons or groups to impose their will on others
by withholding regularly supplied services. Homans also recognizes
that interactions come to be maintained not only by a shared value

system, but also by contrived awards such as money and social status.

The process of rewards comes to be more and more indirect as the

interactions become stretched out between groups, causing adaptive

changes in the social system.

Most of these kinds of theories that Mouzelis considers

the recent trend in organizational literature find their expression in

the view of bureaucracy created by Downs. That is, Downs has syn-

thesized and made coherent a general theory of how people behave in

organizations.

Downs' Model

The fundamental premise of the theory is that all the

officials are significantly--though not solely--motivated by their own

self interest. There follows from this three hypotheses:

1. Officials seek to attain their goals rationally. How-
ever, rational behavior is influenced by three variables:

> (a) limited information because it takes time,
> effort, and sometimes money to obtain data and
> comprehend their meaning.

> (b) limited capabilities regarding the amount of time
> they can spend making decisions, the number of
> issues they can consider simultaneously, and the
> amount of data they can absorb regarding any
> one problem.

> (c) limited certainty in decision making which is
> partially offset by acquiring information.

2. Officials have a complex set of goals including power,
income, prestige, security, convenience, loyalty, pride in excellent
work, and a desire to serve the public interest. But regardless of the
particular goals involved, every official is significantly motivated by his
own self-interest even when acting in a purely official capacity.

3.   The social function of the organization strongly influences the internal structure of the bureau, and vice versa.

<div align="center">(Downs, pp. 2-3)</div>

The theory makes use of five types of officials: climbers, conservers, zealots, advocates, and statesmen. (p. 88) Climbers consider power, income, and prestige as nearly all important in their value structure. Generally a climber will aggrandize by adding subordinates, adding functions, or by capturing functions performed by other officials. Conservers seek to maximize security (hold on to what they have got) and to maximize convenience (reduce effort to the minimum level). They have an asymmetrical attitude toward change, opposing losses in goods, while not desiring more of them. Zealots are loyal to relatively narrow policies which they want to see implemented. They seek power to implement their sacred policies and for its own sake. Statesmen are loyal to society as a whole; they are altruistic insofar as their loyalty is to the general welfare as they see it. A statesman would resemble the theoretical construct for a principal as he is defined in administration textbooks.

These three aspects, the self-interest concept, the three hypotheses, and the types of officials, comprise the basic components of Downs' model. Since the theories that these aspects generate are used in this analysis as they apply to specific parts of the Victoria organization, it appears the wiser course to leave presenting more of Downs' theories until they are required. However, there are two

things that need to be discussed at this time: the first concerns the

hierarchy in organizations, and the second concerns conflict.

Like Parsons, Downs has an hierarchical structure in his

model. But where Parsons sees this as the natural state of affairs

Downs considers it a necessity, and indeed postulates a law of

hierarchy. (p. 52) Moreover, Parsons does not appear to question

why a hierarchy is needed in an organization where men are co-

operating with each other. Downs, by contrast, views a hierarchy as

essential because of conflicts of interest which therefore require a

conflict settling device in order to reduce conflicts to an acceptable

level. First, conflicts are part of the organization simply by the type

of official that Downs postulates, i.e. climbers who will spend a great

deal of their time manipulating conditions of power, income and pres-

tige within the organization and in capturing functions. Secondly,

members do not have exactly the same explicit goals in the organiza-

tion; they perceive reality in terms of their own specialized training

which is to say that they will not look at problems in the same way.

Further, in an educational organization, the various departments are

allocationally interdependent. However, there is a limit on the amount

of funds available. Yet each department head, supervisor, director

and so on will argue that they could do a better job with more funds--

seldom will they try to do a better job with less. For these reasons

some one in the organization must have conflict settling authority.

The significance of Downs' conceptions of how people

behave in an organization may now be related to the major problem

found by Hartrick and Downey in the Victoria organization. They say:

> "The evidence is that in the Greater Victoria School
> System the partnership has all but disintegrated. Indeed,
> a serious condition of conflict, of distrust, and of down-
> right hostility has developed.
>
> "This condition manifests itself in all sorts of unusual
> behavior patterns and in the diversion of individuals'
> energies from normal productive pursuits to abnormal
> defensive activities." (Report, p. 12)

Further, Hartrick and Downey judge the condition serious for three

reasons:

1. The energies of the members were being dissipated
on anxieties, frustrations, and conflicts therefore productivity suffered.

2. Recruitment of staff would become a problem.

3. The co-operative effort for educational progress was
almost non-existent.

Hartrick and Downey do not discriminate conflict from the

chronic discontent that infects teachers. Teachers invariably suffer

feelings of relative deprivation from large classes (p. 103) from a

short supply of tape recorders (p. 103), and from inadequate libraries

and insufficient librarians as well as other specialist personnel. (p.

103) Secondly, the Victoria district is a highly desirable area to teach

in because of its physical setting, nor does it seem likely that there

would be a shortage of applications. Thirdly, the Victoria school

organization pictured earlier in this thesis was shown as a retirement

oriented organization which had been undergoing an extended period of

behavioral drift. In these terms, it would seem more reasonable to say

that the conflict between the trustees and the superintendent would result in increased productivity--if indeed productivity in an educational organization is determinable. Thus, some anxiety would seem to be quite desirable in the structures of the organization. Lastly, there is nothing abnormal about defensive activities in organizations where men are situated hierarchically.

The foregoing is intended to illustrate the importance of a model as a way of looking at an organization. In the following chapter, the problem as perceived by Hartrick and Downey is treated more systematically.

SUMMARY

In this chapter an attempt was made to present the perspective and state of a functioning organization as it would appear to the two investigators. Section one dealt specifically with the organizing image that was used in the investigation. It was suggested that the image of an organism is useful for defining functional structures and processes but that it obscured important differences for men in organizations, namely, that men can change the structure of an organization which is beyond the ability of a mature organism. Also, it was felt that the image encouraged theorists to think of themselves as therapists treating a sickness in an organization, whether of inertia or of conflict. The second section dealt more particularly with the main concepts of the model by Talcott Parsons since his model was

used to describe the whole organization. It is a useful and appropriate

model in terms of a hierarchy, but it is analytically specialized towards

a co-operative relationship. Downs' concepts, presented in section

three, show that conflict as well as co-operation are normal enough

in organizations where men are situated hierarchically.

CHAPTER IV

THE REPORT

"Ten years ago we'd have been run out of this town..."
(Downey, in the "Colonist," May 20/66)

The significance of the Hartrick-Downey model presented

in the preceding chapter can now be made clear through reference to

the Report. The problems and remedies for the Victoria School Sys-

tem are contained in this hundred and twenty page report termed:

"The Co-operative Study of the Greater Victoria School System." Com-

piled by the team, four research assistants, and nine special consul-

tants, the Report has four chapters corresponding to the four levels

of Parsons' Model:

PARSONS' MODEL	THE REPORT
Societal level	The Partnership
Institutional level	The School Board
Management level	The Central Administration
Technical level	The Schools

Each of these chapters is further subdivided into topics, for example,

the board chapter is discussed from the three perspectives of function,

operation, and organization. Each topic is first presented in its ideal

form, a form not unlike the ideal-typical formulations of Weber; then

the actual organization is discussed to show how much short of ideal it

was; finally, changes are recommended to shift it closer to their ideal.

The format of the Report has three colors of paper: the ideal in white,

reality in buff, and the recommendations, blue.

I. Significance of the Model

As practising Parsonian theorists, Hartrick and Downey

viewed the Victoria organization from the perspective of order, defined

in terms of co-operative, harmonious, and complementary relation-

ships. As organization consultants, they viewed their role from the

perspective of organization therapists. And as professionals in the

educational enterprise, they considered the superintendent as right-

fully having control of the organization. Indeed, they conceived of the

organization from the central image of a superintendent's body. These

factors lead to a central proposition for understanding the nature of

the Hartrick-Downey Report: it is mainly an attempt to restore

quiescence in the district by shifting the trustees under the authority

and control of the superintendent.

The superintendent becomes the fixed point of reference

for the organization. From this reference point, Hartrick and Downey

could view those parts of the organization that were not contributing

to order in terms of health and disease, normality and abnormality,

and deviations from their ideal. In other terms, whatever was

causing the superintendent distress in the organization would be

judged harmful and therefore recommended out of existence, or in

the case of the school board, placed firmly under the control of the

superintendent as a lesser ideal.

At first glance these objectives would seem to simplify

the task for Hartrick and Downey. Actually, the task assumes heroic

proportions, though it is correspondingly simplified for the thesis.

The complications from using this model appear to lie in three main

areas: 1) the shift of power as it was discussed in chapter II of this

thesis; 2) the immense inertia that normally characterizes the edu-

cational enterprise; and 3) the incumbents in the Victoria organization.

The Shift of Power

In Parsons' model the shift of power has not taken place.

In his model, school organizations are still tools in the hands of the

trustees as the legitimate policy-making body whereas, today, the

organization itself has become the master, dictating the general goals

to be pursued. Parsons' line of hierarchy places the board of trustees

in the level above the central administration. According to the theory,

the values of one level are set by the next highest level. The policies

should flow downward from the board to the central administration.

By virtue of elections, trustees are given power by the people; by

virtue of competence, administrators are given authority by the trustees

to run the organization. Belief in the rightness of law is the legitima-

tion sustaining both the political and bureaucratic structures.

In practice, school administrators appoint each other.

District Superintendents in British Columbia are all members of the

Department's staff, all appointed by the Department, and therefore, to

use Hartrick and Downey's image, are all extensions of the Chief

Superintendent of Schools. Moreover, the professional ideology holds

that superintendents are chief executive officers, thereby placing

school boards under their control. From this perspective, school

boards must be viewed as a symbol of community control serving to

reassure parents, taxpayers, and community residents generally of

their control over the educational system.

Hartrick and Downey had to make some adjustments in the

model. While the order of chapters places the school board in ascen-

dancy, the chart which has been examined in the thesis and which came

from the Partnership, indicates how and where the adjustments took

place. The chart is a blend of two system referents, the provincial

organization and the local organization. Thus, the Department emer-

ges as a fifth level incorporated into the local organization but

hierarchically over the local school board. It follows logically enough

that the local superintendent, as an extension of the Chief Superinten-

dent, had somewhere in the text to be provided the rationale for being

appointed executive officer by the board. Truly a delicate undertaking.

The Inertia of Educational Organizations

As professional educators concerned with public school education, Hartrick and Downey were aware of the immense inertia that has characterized these institutions. While the main thrust of their investigation was most clearly towards restoring quiescence in Victoria, they were also aware of the need for creating imbalances, for encouraging conflict, within the organization. *

It is true that an organization can change through agreement and perhaps more readily through agreement than through conflict. But it is also true that the Victoria organization was retirement oriented, had been undergoing a prolonged period of organizational drift, and that some conflict was inevitable and desirable while it underwent a process of organizational catch-up. The task for the investigators lay in determining those areas where conflict would not be harmful to the superintendent, as distinct from those areas where consensus was essential. In these terms, the Hartrick-Downey Report stands as a document which relates where dissent will be tolerated in public school organizations.

The Incumbents of the Victoria School System

In light of these comments on their intention to restore

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* It is fair to say that both men were concerned in theory with finding means for upsetting equilibrium. Thus, Downey asks how upsetting an organization in a state of "no change" can best be achieved and suggests a change agent who "is nothing more than an agitator, a disturber of balance, a stimulator of discomfort or dissatisfaction." (1965, p. 202) Similarly, Hartrick at the Parksville convention cited earlier speaks of the same "change agent" technique.

order in the Victoria organization, to subordinate the trustees to the

superintendent, and yet to encourage change, one can sympathize with

the task facing Hartrick and Downey. They were dealing with a 63 year

old man in the person of John Gough, a man who had been unable to

cope with the growing complexities of the organization and with the

growing political problems of the board meetings. He had made all

appointments in the district for a period of thirteen years, and there-

fore, underneath him through level after level of bureaucracy, were

incumbents with relatively homogeneous views. It seems unlikely

at this stage in the game that Gough would change; nor does it seem

likely that the trustees would accept him as chief executive officer

insofar as bureaucratic authority relies on competency. Consequently,

there exists a basic dilemma for Hartrick and Downey in attempting to

fit Gough and the trustees into their model. A second dilemma exists

between the legal definition of a superintendent's role and the super-

intendent's on-the-job behavior. Collins (1958) investigated the

relationship for British Columbia superintendents and found that super-

intendents were expected to be line officers of the Department and a

staff officer of the local board--yet, superintendents saw themselves

as being both line and staff officers of both bodies. Gough was a man

of integrity. Fisher (1961) concluded that the superintendent's personal

integrity is the greatest source of potential conflict in dealing with the

board. No man of integrity can serve two masters, and here lies the

root of the conflict. Clearly, these matters posed a problem of

considerable dimensions for Hartrick and Downey.

II. The Report and Recommendations

The Partnership

The partnership in the Hartrick-Downey Report reaches

an ideal state at the time it becomes a pyramid, both in structure and

process. At the top is the provincial superintendent of schools who

has the responsibility for setting policies and standards which are

implemented by his staff of local superintendents for their district's

schools. (p. 10) Local school boards have the function of adapting

these policies according to the needs and aspirations of the local areas.

They note that the local board does have the option of appointing or not

appointing the District Superintendent as its executive officer, but it

does not have the right to select anyone other than a member of the

Department's staff as its Superintendent. (p. 15) The significance

of these prescriptive statements is that the discussion takes place in

the ideal. In other words, Hartrick and Downey are not only committed

to the fact of local superintendents being members of the Department's

staff, but in elevating this to an ideal, they could hardly recommend

that the board change the established order.

Perhaps this is the most significant point that needs to be

made about the Hartrick-Downey Report, particularly as it has bear-

ing on Downs' notion that outside consultants could make significant

recommendations for a change in the status quo. The recommendation

that Hartrick and Downey might have made would have suggested that

the local board demand the right to recruit a superintendent from out-

side the Department's personnel. This would have resolved the "two

master" problem which now exists as well as according legitimacy to

the local superintendents. Moreover, the concept of the superinten-

dent as chief executive officer would also be more agreeable. And

clearly, someone in the organization must have conflict settling powers;

therefore, a local board must have a chief executive officer. To say

that they have an option about this matter is impractical.

It was a lost opportunity. Hartrick and Downey speak of

an ideal relationship between the provincial authority and the local

district in these terms: "It (the local district) will strive to reach

beyond--fully recognizing the function and responsibility of the provin-

cial authority, and, hopefully, in close co-operation with the provincial

department." (p. 16) The board is accorded freedom from constraint

in providing more money for the organization, thus:

> "The local district need not be restricted to the minimum
> educational standards set by the province; it can go be-
> yond. It need not be limited by the basic provincial
> formula or foundation program of expenditures; it can go
> beyond. And it need not be curtailed by the staff entitle-
> ment formula established by the province; it can go be-
> yond. In these and other matters, the purpose of provin-
> cial formulae and standards is to guarantee a minimum
> level of services for all areas of the province--not to
> curtail effort or initiative in the specific local area."
> (p. 16)

However, to provide these extra funds it would be neces-

sary for the board to deal with municipal government insofar as the

local board prepares its budget which becomes the basis for the local

school tax, to be levied and collected by the municipal government.

Since both groups are financially interdependent, but legally indepen-

dent, the finding by Hartrick and Downey that "normally harmonious

relationships" between the board and council did not exist, should in-

dicate that some conflict existed over the amount each group received.

Not so: Hartrick and Downey found that normally harmonious relation-

ships did exist at the annual budget review when trustees and council-

lors met to discuss educational financing. These were termed

"amiable and co-operative meetings." (p. 20) The equation of more

money with quality education is depressingly familiar. Seldom do

educators seek a more creative use of the resources they now have.

Moreover, it makes little sense to praise the board for amiable and

co-operative meetings with budgetary rivals at one instance, and urge

them to get a larger share of the budget in another.

The Board of School Trustees

The section on the board of trustees deals with the func-

tion, organization, and operation of the board.

Function: Textbooks and journals in school administra-

tion are almost unanimous in contending that it is the function of the

board to legislate, and of the superintendent to execute. (see II, p. 24)

However, a superintendent generally initiates policy, and provides the

evidence on which the board makes policy decisions. (Griffiths, loc.

cit.) In their moment of realism, Getzels et. al. call the established

legislative-executive function a "cliche" insofar as the central adminis-

tration furnishes information to the board and actually recommends

policy. Making policy is important; ratifying policy is not. The inter-

pretation of the board's function that has been used consistently

throughout this thesis holds that school boards, by their existence,

are a symbol that provides legitimacy to the policy decisions made by

the administrators. The point cannot be over-stressed.

John Gough, after many years of quietly controlling the

Victoria school district, found himself confronted by a political activist

who wanted to make policies and who possessed the legal power to en-

force decisions on the organization. In fact, there were two men,

Bunn and Porteous, who prodded and probed the directors and super-

visors as well as the superintendent for information regarding the im-

plementation of policies made by the whole board. One of Gough's

responses was to enforce silence on the directors and supervisors;

another was simply not to present alternative possibilities in policy to

the board. The point is of some importance insofar as Hartrick and

Downey have three functions for the board--the legislative function, the

executive function, and the judicial function. (p. 29) Judicial function

refers to evaluating policy that has been implemented, which the Vic-

toria board had been prevented from performing.

One is at a loss to deal with the reality constructed by

the investigators from their observation of school board meetings.

They say:

(1) "...the Superintendent feels compelled for his own protection to call upon the Board to make executive decisions."

(2) "...the Board has not attempted to develop comprehensive, long range policies."

(3) "...each party withholds vital information from the other."

(4) "...The Board rarely calls for reports on the effectiveness or the implementability of its policies and, as a result, far too many policies are lost or forgotten."

The result, they say, is that policy-making has become a haphazard process. But not in this section, nor in the following sections of the Report, do they find fault with the superintendent, despite the textbooks and the Report asserting that a superintendent is responsible for policy formulation with the Board. Finally, it should be noted that the recommendation which states: "The Board spend more time in policy-making and less in policy-execution." is unlikely to resolve the basic problem: the structures simply cannot accommodate active trusteeship.

Organization: The central image for the organization is that of the superintendent from whom all members are extensions. To create the structures that would accommodate to this image, the authors had to eliminate those parts in the organization that were functioning independently if possible, or at least bring these parts under the superintendent's control. Two examples are presented here to support this contention: the intent of both is to transform the individual trustee into a Board, thereby insuring unity and singularity.

Although individual trustees are elected to represent

various municipalities by a fixed formula which states the number of

representatives the municipality will have on the Greater Victoria

Board, the ideal is that the Board member should focus on the whole

district when making policy. (p. 36) They advise the Board to seek

rational, educational bases, rather than political, representative

bases for decision, and they found that the Board appeared to have

achieved the comprehensive view necessary for rational rather than

political decisions. (p. 39) In truth, such a concept is commendable

provided the politicians could do it. But, the advantage of unity lies

more with the peace of mind of a superintendent than with the district

as a whole. The authors then cite Section 89 of the Public Schools Act

in order to establish the Board as a "body politic and corporate."

Thus, they argue that the Board can legally communicate only as a

corporate body. From this perspective, they recommend that the

Board develop defenses and strategies to discipline any trustee who

violates this corporate status.

The intent, of course, was to prevent trustees communi-

cating with the press. But the interesting feature of the discussion is

evident when one considers the political power of the trustee. For

example, Victoria like all school districts has better quality schools

in some areas than in others. Some areas are simply not influential

politically in the district. One would like to think that the Board would

focus on the whole district; that the Board would vote better schools,

materials and instructional staff to deprived areas; but it is better to

deal with political realities. In these terms, an individual trustee who represents a deprived area should voice his discontents--and in the local news media if necessary. Further, he should ignore the restraints of other trustees--it was simply a novel way to bring trustees under the disciplinary radius of the superintendent.

The second example concerns the use of standing committees. A trustee may serve on a standing committee that is delegated to various departments in the organization. A standing committee probably ensures that a trustee becomes aware of the problems any department is having, permits a feedback to the whole board from a source they trust, and enables a trustee to gain expertise in various aspects of the organization. Hartrick and Downey note the use of standing committees is the most common practice in the country's educational organization, and that the B. C. School Trustees' Manual finds them essential for efficient Board operation. (p. 37) Yet on observing the committees were acting independently of the superintendent, Hartrick and Downey suggest that they are a "hold-over" from the days when the typical school district did not have an executive officer. They recommend standing committees be abolished. Perhaps the most striking feature of their argument is in the tenacity they display to establish unity. Consider this portion:

> "Committees may spend valuable time on executive tasks
> which ought to be delegated; as a result, confusion may
> develop between the functions of the executive and the
> functions of the committee; and the executive officer may
> be encouraged to abdicate his position of authority and

accountability. In addition, business-by-committee may
tend to fragment the Board's interests and members; it
may reduce the Board meeting to a simple rubber stamp-
ing operation (if committee recommendations are readily
adopted) or it may lead to burdensome duplication of effort
(if committee recommendations are seriously questioned
and considered).

"For these and other reasons, standing committees are
dangerous; if they are used, they should be used with
caution and appropriate safeguards should be provided."
(p. 38)

These dangers are expressed in the "ideal" section. It
turned out that the evidence presented in the "real" section confirmed these
fears: the board was wasting its time when it did not accept recommen-
dations from the committees; it was making unwise decisions when it
did. (p. 39) It is possible that the authors misunderstood the value of
standing committees for the superintendent. In the main, the involve-
ment of a trustee through the use of standing committees has been,
according to the superintendent, useful in achieving a consensus.
(Interview) The recommendation was thus not implemented.

The Central Administration

The section on the Central Administration is divided into
two parts, the first dealing with structure and the second with the opera-
tion.

In an article appearing in the Colonist entitled "No Witch
Hunt Here Says School Probe Team" (May 20, 1966)--probably to re-
assure an anxious central administration, teaching body and community
--Hartrick and Downey explained their intentions. They said their task
was to examine the organizational structure and how it worked, not to

assess personnel. They were not there, they insisted, to perform a

witch hunt for the board. When they saw a principal or a teacher not

doing his job, "it is not our role to point this out but rather to say to

the board: 'What are your procedures for evaluating personnel?'"

They maintained this position in their Report:

> "Our concept of the 'ideal' organizational structure grows
> directly out of the general task areas of education and of
> the principles of organization. It does not, of course,
> take account of the uniquenesses that characterize speci-
> fic situations or of the adjustments that are usually neces-
> sary when specific personalities are appointed to specific
> positions. It merely includes the initial forms of an ideal
> blueprint." (p. 55)

Since this ideal blueprint is repeated verbatim in the recommendations,

these matters are of importance. That is, Hartrick and Downey never

do discuss flesh and blood people in the organization but remain at an

ideal-typical level.

They focus on the formal aspect of the administrative

structure. A clear distinction is made between the position and the

person who occupies it so that the responsibilities and inter-relation-

ships among the officials are considered independently of the person

who will assume them. Vertically, the administration is conceived as

a hierarchy in which authority is delegated from the top down. Hori-

zontally, the administration is analyzed in terms of functions; i.e.,

staff and line. Finally, the solution to the problems of the central ad-

ministration are said to lie in the application of "sound principles of

organization and management." These include unity of control, chain

of command, unity of objective, span of control.

Woodward (1965) argues that principles of successful

management change from one technological context to another. She

shows convincingly that the sort of principles elaborated by Hartrick

and Downey are only relevant in mass production factories. It is prob-

ably true that educational organizations have some common ground with

military and industrial organizations, but the differences are immense
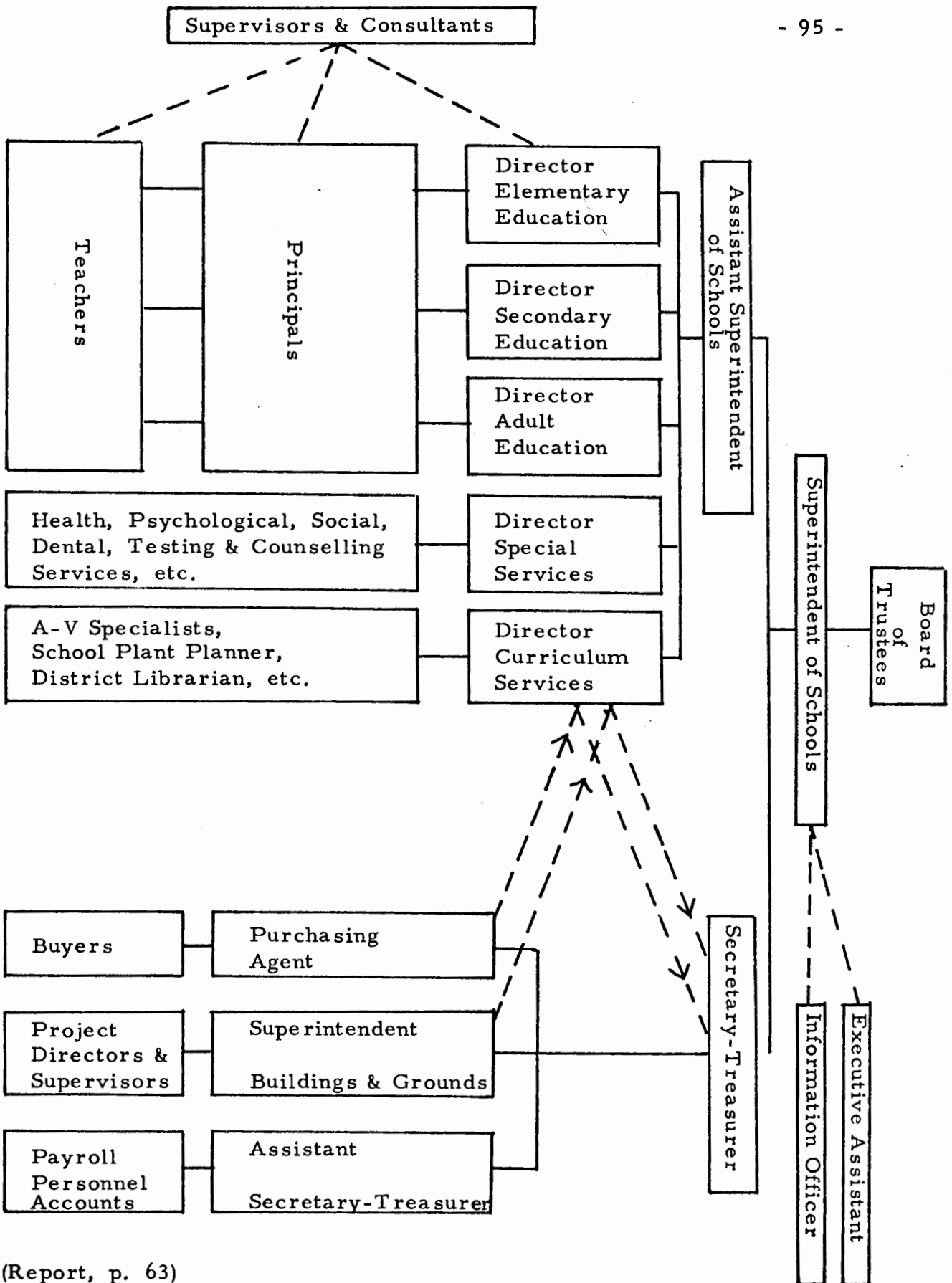
and important. Mouzelis adds these comments:

> "Any attempt to elaborate principles of sound management
> in a common sense manner is bound to be unsuccessful in-
> sofar as it is based on a formal model of organizational
> structure--that is, insofar as it does not take into account
> and try to find out empirically about the feelings, beliefs,
> and actual modes of behavior of people, about the ways in
> which they are actually related to each other." (p. 96)

The limitations of the Hartrick-Downey investigation of the central ad-

ministration are obvious. Because they concentrate on the formal as-

pects of organization, prescribed relationships, and ideal typical ways

of acting, their work has a non-empirical character. This constitutes

a basic contradiction to the notion of investigation.

The blueprint which re-orders the parts serves as a guide

for discussing those recommended changes which appear to be signifi-

cant. (SEE BLUEPRINT WHICH FOLLOWS)

1. The superintendent is appointed chief executive officer
with only two second-line administrators communicating directly with
him.

2. All five educational departments have administrators
who are elevated to peer status and the title "director." There is no
loss in power, income and prestige.

(Report, p. 63)

3. The bureau is expanded by the creation of a new position: Director of Special Education. This means, of course, a whole new department.

4. There are no losses of positions in the re-ordering anywhere in the organization.

5. Control is consolidated into an <u>executive council</u> consisting of the superintendent, the two department heads, and the eight divisional directors. It was recommended that this administrative team meet regularly and often for the purpose of planning, co-ordinating, directing, communicating and evaluating.

All educational organizations have an inherent tendency to expand. This is the status quo. Expansion normally provides officials with increased power, income and prestige; reduces internal conflicts in the organization by allowing, as in this case, the Directors to increase their personal status without lowering that of others; and permits new resources (provided by the school board as they go beyond minimum standards) to be allocated to some departments without losses to others. Since there is no inherent quid pro quo in bureau activity, as in industry where marginal returns can be measured against marginal costs, the incentive structure within the central administration provides much greater rewards for increasing expenditures than for reducing them. Hence, the investigators encouraged the normal expansion inherent in the organization. (Downs, pp. 16-18)*

The question Hartrick and Downey might have asked, and

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* Expansion reduces internal conflicts in the short run: the process is never complete or finished. Other than the instant creation of new positions, individual officials can expand their own functions or can capture the functions of others. These matters are dealt with in the following chapter when expansion is again discussed.

one that would have permitted them to spend their time more fruitfully,

was whether all these positions are necessary in the organization. In

a study done in an urban center of Alberta, Formanek found that the

central office staff were not much help to beginning teachers. Only

19% of beginning teachers turned to consultants for help in their first

year. (in Robinson, 1968) Similarly, Wiens, in a study done in three

large Western Canadian school systems, found that 62. 5% of the teachers

in these systems never ask for the services of consultants. (ibid)

Consider, too, the implications of this following example for what

might have been recommended. Mark Shedd, a well known superinten-

dent of the Philadelphia school system, conceives of the central adminis-

tration as a supply depot rather than a military headquarters. Accor-

dingly, he has decentralized its functions through such means as setting

up a fund from which principals can draw grants of up to $15, 000. 00 for

special projects thereby providing independence in the crucial area of

budgets. Also, 381 administrators one day found that their jobs had

been eliminated on the pretext of belt tightening and that they had a

choice of either early retirement or lower-paying jobs. (Roberts, 1969)

In their detachment from operational responsibilities, one could reason-

ably expect Hartrick and Downey to have made one radical recommenda-

tion.

To do this requires a focus not on the general task areas

of the central administration, but on the needs of the child, of the

teacher, of the principal--in short, from the bottom up rather than the

top down. Only in this way does the need to eliminate levels between

the classroom and the superintendent become manifest and urgent.

One recommendation in which Hartrick and Downey do

appear to have a worthwhile and fruitful intent is in recommendation 27

on a planning and advisory committee. As they explain:

"RECOMMENDATION 27: THAT A <u>PLANNING AND ADVISORY COM-</u>

<u>MITTEE,</u> CONSISTING OF 10-15 PERSONS REPRESENTATIVE OF <u>ALL</u>

TASK AREAS AND ALL LEVELS OF ADMINISTRATION AND INSTRUC-

TION, BE APPOINTED ANNUALLY BY THE SUPERINTENDENT TO

MEET REGULARLY FOR THE PURPOSE OF PLANNING LONG-RANGE

GOALS, DIRECTIONS, AND STRATEGIES FOR THE ORGANIZATION.

>"It is suggested that a number of criteria be considered
in selecting the membership of this committee. As indi-
cated, the committee should be representative of all areas
and levels of the system. In addition, it should draw upon
the talents of persons who have creative, speculative and
conceptual skills. Appointment to the committee should
be regarded as something of an honor and a reward.

>"Service on the committee should be viewed as an impor-
tant part of the task of the individuals concerned; it should
not be an 'after hours' activity.

>"The committee should be purely a study and advisory
committee. It should give attention to: the long-range
goals, aspirations and strategies of the system; emerging
trends in education; possible innovations or experiments;
and such other matters as, from time to time, may come
to its attention.

>"In addition to its primary planning function, the committee
should be expected to serve as a vehicle for improving
communication--in all directions. It should not, however,
be allowed to degenerate into a 'Complaints Committee'
--or a vehicle for circumventing the principal or the for-
mal organization.

"On occasion, this committee should meet with the Executive Council, and, on occasion, with the Board. In each case, the purpose should be to debate crucial educational issues and to share philosophies and aspirations.

"In summary, the committee should be encouraged to think and plan beyond the day-to-day problems of the system; it should engage in speculation about bold, new ventures for the Greater Victoria School System; but it should leave problems of implementation to the other policy-making bodies or to administrators."

This planning and advisory committee concept is also

spoken of by T. C. Byrne (1968, p. 165) although he calls it an "educa-

tional policy committee." Byrne sees the committee as a built-in

counterbalancing device within the bureaucracy itself in terms of a mis-

use of power by a superintendent. This committee could be truly rep-

resentative of the profession, Byrne feels, because the appointments

are made by the professional association. However, in the recommen-

dation from the Report, the committee is appointed by the superintendent,

a factor which has led in Victoria to a selection of relatively mild people.

Teachers speak of it with some contempt. It has been functioning as

little more than a special tea party with the superintendent, they say.

But the committee itself is quite an important concept as

envisioned by Hartrick and Downey. A committee drawing on the talents

of persons who have creative, speculative and conceptual skills and

engaging these skills towards thinking through the shape and form of

the Victoria schools in the next decade is obviously an essential ingre-

dient. One reason which has been offered for specifically giving the

superintendent choice of committee members concerns the state of the

local association at the time of the investigation. At this time, the local

association was marked by a high level of hostility which was manifested

in the behavior of a few leaders within the association. Recognizing this,

Hartrick and Downey attempted nevertheless to establish the planning

and advisory committee by giving the superintendent the choice of mem-

bers and thereby enable him to circumvent the hostile faction with

which he would have been unable to work. It would seem wise at this

point of time in the development of the Victoria school system for the

committee to move the one step needed to fulfill the conception advanced

by Byrne. That is, if the committee is to live up to its promise, then

it should be composed of elected members from the professional associa-

tion. While this conclusion might not be agreeable to the superintendent,

failure to do so must result in more "tea parties" rather than creative,

speculative planning as envisioned by the authors.

The Schools

There are no doubt many emerging forces to trouble the

world of school superintendents. One of them is community participa-

tion, another rising teacher militancy.

Fantini, (1969) who worked with the Ford Foundation in

New York City Schools, views emerging community participation pat-

terns with more hope than despair. Participation by students, parents,

and community residents in the process of decision-making enables an

enormous amount of energy to enter the school system. By themselves,

schools lack the energy for any transformation which would permit them

to respond to the multiple new demands being made upon them. By

combining the energies of these new publics with those of the profes-

sionals the schools might be expected to solve at least some problems

presently confronting them. At present, there is ample evidence of the

massive failure that centrally controlled schools has produced. (ibid.

p. 94)

New models are needed that depart from the traditional

authoritarian structures in public schools. The old models are rapidly

becoming irrelevant and unrealistic; they are barriers rather than aids

to the re-definition of roles within school organizations. (Goldhammer,

1967, p. 158) For much too long the models from industry have been

applied to school organizations, but the management in education is

actually behind the management in industry which has long since accep-

ted unions. Goldhammer asserts that the advent of strong teacher ac-

tion to support their demands has caught the administrator short. (p.

132) Superintendents and principals, accustomed to their paternalistic

role, expect compliance from teachers and perceive teacher demands

for involvement in decision-making as a threat to their own domination

of school policies.

It seems likely these new forces that could up-date and

make relevant the schools will be sidetracked into conflict. Anderson

(1968) observes that: "Teachers want to make decisions that they con-

sider within their professional domain, and they are not satisfied with

participation in decision-making at the discretion of administrators."

(p. 172) Probably teachers will be given the opportunity to participate only in decisions that do not hurt the management. The alternative is that administrators voluntarily cede power and prerogatives to teachers, but it seems unlikely that an administrator will sacrifice his own interests for altruistic purposes. Therefore, confrontation politics are probably an inevitable outcome of teacher militancy. Thus far, educational administration has been bankrupt in ideas for structural changes that would help teachers participate.

In light of these brief comments, the work Hartrick and Downey busied themselves in at the school level appears willfully irrelevant. First, there is the question of the teachers' association which was asked, much in the manner earlier suggested to trustees, to restrain its membership. Specifically, this meant not by-passing principals and other administrators but rather establishing rules of procedure and communicating only through formal channels. As for the teacher's role in the partnership, they say the teacher's major responsibility in the partnership is in the classroom: "The Board provides the facilities; teachers provide the instruction." (p. 109) Hence, they recommend:

> "That teachers, individually and collectively, prepare
> themselves to accept the responsibilities that will be
> theirs when the proposed educational partnership becomes
> a reality." (p. 109)

But where, one asks, is the proposed partnership in their Report?

When does it become a reality? Hartrick and Downey appear to view teachers from the paternalistic role of the administrators.

Second, they busied themselves with teaching and learning

conditions commenting on such matters as a shortage of tape recorders,

overhead projectors, and specialists. They found the classes in the

Victoria system were too large and recommended that the board turn

its attention to the pupil-teacher ratio. (p. 103, 105) But the research

on reducing a class size for a teacher in a self-contained classroom,

age-graded, egg-crated school with irrelevant curricula, indicates it

has a minimal effect because the total institution is dysfunctional.

(Fantini, p. 95) It is like trying to up-date a Model T Ford by putting

on a new carburetor.

Third, Hartrick and Downey examined the principals in

the Victoria System. Principals were criticized severely because they

tended to follow traditional patterns of organization and therefore to

encourage status-quoism. (p. 85) However, the principals had expres-

sed a distaste for supervising teachers in the traditional manner and

the authors argue for supervision. Their argument is worth repeating:

> "...when one considers that the real purpose of super-
> vision or leadership is to improve people, and when one
> considers that diagnosis or evaluation is not unreasonable
> antecedent to treatment, then the notion of the leaders
> serving also as an evaluator become logical enough. "
> (p. 78, emphasis added)

Such is the rhetoric of teaching. Finally, principals are urged to be-

come educational statesmen, study their roles, and assume some initia-

tive.

It is in the section on Principals that Hartrick and Downey

encourage dissent. They observed that principals played a relatively

insignificant role in the procurement of supplies and equipment. Prin-

cipals, however, seldom took a stand on such matters or carried out

objections to higher authority. Out of this observation comes the

recommendation that principals, with the advice of the Directors, the

Assistant Superintendent, and the Superintendent, study their roles,

duties, and responsibilities. Clearly, the Central Administration would

not be threatened.

SUMMARY

This chapter has attempted to complete the work of the

previous chapter by linking the model directly with the Report.

The image used by Hartrick and Downey is that of a

functioning body, or an organismic analogue. It is a useful image for

theorists and one that is widely used. The main criticism of it is that

theorists tend to view disturbances in the system as malfunctions.

For example, Hartrick and Downey speak of the informal organization

as something that becomes active, in the manner of a disease, when

the formal organization begins to malfunction. Similarly, a teacher's

professional association is asked to remain latent, and communicate

("the life blood of any organization, " p. 69) only through formal chan-

nels.

The conceptual framework used in the investigation is that

of Talcott Parsons. It results in a view of the organization that is not

false, but very partial. The main thrust of the Report is towards

establishing order, mainly by placing the various parts of the organi-

zation under the control of the superintendent.

Perhaps the main criticism of the Report is in the lack of

any recommendations that depart from the status quo.

CHAPTER V

IMPACT OF THE INVESTIGATION

INTRODUCTION

Anthony Downs is an uncommonly astute observer of

bureaucratic behavior. Central to his theories is the proposition that

officials are motivated by self-interest as well as their specified roles.

From this self-interest concept, Downs develops an image of bureau-

cratic behavior that has a soundness, unity, and coherence to it. More-

over, the self-interest of officials has led him to see quite clearly a

fundamental problem in organizational change. Resistance to change is

partly rational behavior for officials. Thus, there is a need to establish

consensus before making decisions. However, in a large organization

this need for consensus effectively narrows the range of alternatives

that will be considered in the search for information. The more officials

involved in search, the greater the diversity of views and interests affec-

ting significant changes in the status quo. Response by decision-makers

to this problem is usually to restrict the number of officials involved.

This enables decisions to be made faster and easier but it also restricts

the range of alternatives considered. One way around the problem is

suggested by Downs in the creation of an outside agency:

> "There may be a partial escape from this dilemma for
> more significant decisions if the bureau's top officials can
> create some outside agency that will be free from direct
> operational responsibilities within the bureau, but quite
> familiar with its goals, rules, behavior, and routines.
> Such an agency can be used as an aid in searching for al-
> ternative courses of action, and for information useful in
> analyzing and evaluating alternatives. Ideally, its mem-
> bers should be familiar enough with the bureau to under-
> stand the inter-dependencies therein, but detached enough
> to propose changes involving major departures from the
> status quo. Such detachment normally results only when
> men have not direct operational responsibilities. The
> payoffs from such an arrangement can be very large."
> (p. 182-3)

Obviously the payoff for the Victoria investigation does not

lie in the Report which is marked by a timidity of proposals as well as

a promanagement bias that seeks to restore the status quo. In part,

this lack of any major changes and significant proposals may be attri-

buted to the number of people the investigators involved in their deci-

sions. The investigators themselves essentially adopted the posture of

a Royal Commission in size and scope, thereby reducing the number and

nature of alternatives considered because of the need for achieving con-

sensus. In this sense, the role undertaken by the investigators is

indistinguishable from that of an ad hoc committee. And both are con-

strained by the same needs for consensus leading to the same relatively

mild recommendations.

In part, the lack of significant proposals stems from the

payoff for the local board which initiated the investigation. Very simply

they wanted a purge of the superintendent. It is interesting that that

superintendent resigned during the fifth month of the investigation and

since the investigation itself was of six months' duration, the manu-

script for the Report was presumably still undergoing revisions. The

date for its release to the awaiting public had not been made official but

the formal release appears to have been scheduled for August. Since

the superintendent chose to resign in May there may have been some

anxiety over the content of the forthcoming report but it seems more

likely that the total investigation rather than the report encouraged him

into retirement. This being so, one is inclined to agree with Downs

that significant changes can be made in school organizations but not by

proposals of outside agencies, rather by the concept of an investigation

itself. An investigation simply legitimizes recognition that an official

is performing his task in an incompetent manner.

The task for this chapter can now be specified. It seeks

to determine the payoff from the investigation by examining the con-

sequences, determining whether or not these constitute a departure from

the status quo, and finally evaluating the strengths and weaknesses of

outside consultants for educational organizations.

Part one of the chapter examines the resignation of the

superintendent. To do this effectively, it is necessary to broaden the

scope of the discussion. This broadening scope involves consideration

of similar events as they have been assembled in empirical research

across North America. Early retirements of superintendents in British

Columbia are relatively rare. But in the United States, where there appears to be more of a free enterprise system among superintendents the hiring and firing procedures are more flexible. Moreover, enterprising superintendents are imported across state lines. By contrast, superintendents in British Columbia have to be members of the Department's staff and the enabling legislation through which the Department maintains this control is codified in the manual of school law. It was also sanctified by the authors in their ideal.

The question that is posed for the first section then is one of determining whether or not the early retirement of a 63 year old superintendent constitutes a departure from the status quo. Clearly it is the disposition of the vacant position that is of consequence.

Part two examines the impact of the investigation upon the central administration. In this section the Report can assume more relevance insofar as it urged expansion. Part three attempts to formulate the strengths and weaknesses of this investigation.

I. Early Retirements

Place-bound superintendents. Perhaps the most systematic studies available on the recruitment criteria used by school boards in hiring superintendents has been done by Richard O. Carlson. (1961; 1962) Carlson distinguished two career lines of superintendents: place-bound and career-bound. Place-bound were insiders appointed to the superintendent's office after a career of employment within that same district.

In Victoria, Gough falls into the category of place-bound inasmuch as he had been an educator in the district for 43 years.

Gough also suffered the problems of the place-bound superintendent of Carlson's description. Carlson reported that the place-bound superintendent lacked bargaining power, lacked access to other superintendencies, and lacked a mandate from the board to initiate new educational policies and directions. Moreover, he tended to emphasize established rules, to make few changes in the central staff, and to legitimize his right of office on the basis of accepted policy and practice. It seems probable that the decision of the board to purge the superintendent was an indicator of a felt need for change not only in the person of the superintendent, but also in his policies, and in his staff.

Career-bound superintendents. Career-bound superintendents are chosen from outside the district's educational staff and their choice is in response to the felt need for change. In short, they are viewed as change agents. Early in their tenure, career-bound types made new rules for the system and added to their central staffs. Both of these factors were accommodated by the Report which effectively established the pre-conditions for a satisfactory transition between superintendents. A career-bound superintendent is relatively free to establish policies and activities consonant with his own professional ideology.

Changing superintendents. Building from Carlson's studies on types of superintendents, other researchers have looked for indicators of change

in the changing composition of a school board and in the changing social composition in the area. Two of these studies made in the Claremont Graduate School are reported in Iannacone (1967).

Freeborn (1966) studied roughly a decade of the political history of three Southern California counties involving one hundred and seventeen school districts. One hundred and twenty-one instances of superintendent turnover were found between 1956 and 1966. In turn, these were related to the defeat of an incumbent board member and agreed with the reported strong relationship between turnover and incumbent defeat. The prediction was supported that outside superintendents would be appointed by boards where incumbent defeat had taken place within three years of that political change. Freeborn concluded that the selection of a new school board will result in a power struggle on the board and will lead to, or be followed by, the selection of a new superintendent who will be an outside man. On the other hand, continuance of an old school board will result in a stable board condition and a continuance in office of the old superintendent. When the old board is faced with the selection of a new superintendent it will choose from within the organization. (p. 17)

Kirkendall (1966) was concerned with exploring the possible indicators and signs preceding incumbent school board member defeats. His study provided strong support for the belief that changes in the social composition of the area led to political activities which result in an abrupt shift in the governmental dimension following the defeat

of an incumbent board member. Two necessary causes which combine

for incumbent defeat are: 1) changes in the social class composition

of the particular district followed some seven to ten years later by

2) political action to upset the districts status quo. (p. 104-5) Thus,

a process is set in motion from changes in the social environment

leading to political changes in the activities of the board which results

in the selection of a change-agent successor superintendent for the dis-

trict.

From these studies, Iannacone observes that established

superintendents continue the policies of the past while the school dis-

tricts themselves undergo changes in social class composition. (1967,

p. 98) It is probable that a group of newcomers to the district represen-

ting a social class shift and, hence, least likely to merge easily into

the existing power structure, collide with the rigidity of the old team

led by the superintendent. Usually within three years the superinten-

dent is eased out of office. Iannacone calls this "involuntary superin-

tendent turnover." (p. 98) He concludes:

> "This pattern first found at the local level in case studies
> and then tested with verificational studies, confirms the
> capacity of local school districts to change themselves or
> their schools. The operation of even relatively blind
> forces follows social laws. In the case of the local school
> district, these do produce change, bringing a school into
> alignment with its society. The application of intelligence
> through eliminating legal barriers which hinder this pat-
> tern of change in particular states may be wise." (p. 98)

These studies can now serve as background towards understanding the

events in Victoria.

<u>Resignation in Victoria.</u> As always in social matters, there exists a
deeply inter-connected matrix. The Victoria Area had undergone
population expansion, and clearly, not only of retired people: student
growth in the six year period went from 22, 843 to 29, 340 or roughly an
increase of 25 per cent. In addition, Peter Bunn and John Porteous
were elected to office in 1961 and both men collided with the rigidity of
the established superintendent. However, the factor which prevents
the "blind forces following social laws" from becoming operative in
British Columbia is the control exercised by the Department of Educa-
tion. It is a control which again becomes manifest in the events sur-
rounding the resignation of the superintendent.

Superintendent Gough resigned in a fairly stormy board
meeting on the evening of May 17, 1966. Accounts in the local press
are dramatic and colorful probably because of the rarity of superinten-
dents being eased out of office in the province. Accounts termed the
resignation "stunning," "inevitable," and a "bombshell" and were gene-
rally a quaint mixture of hints, speculations, and appeals. For exam-
ple, a reporter states explicitly that the conflict was over "who would
be boss in the system--the laymen on the school board or the adminis-
tration personified in Gough himself." (Times, May 18) Having iden-
tified the problem, he suggests that no one would come out and say
these things, but it was easy to read the signs. While the ink flowed,
both Bunn and Porteous addressed themselves to the problem of choosing
a successor and their appeals for public support followed this pattern:

"We have to persuade the Department of Education to let us appoint and pay our own superintendent. It is impossible for a chief executive officer to be answerable to the Department as well as to the board. ...the new superintendent must be a board man 100 per cent." (Times, May 18)

However, the Department moved efficiently in the logrolling which followed Gough's resignation.

First, the Department communicated its wishes to the Minister of Education, who is of course the elected sovereign of public school education. It was the Minister of Education who announced that he was "pleased to accept the recommendation" of the school board in their choice of superintendent who was to be the 62 year old assistant superintendent presently serving in Victoria, Joe Chell. (Colonist, July 10) In this way, the Department gained legitimacy for the appointment, maintained control of the district and quashed a precedent that might have developed in other districts.

Secondly, the Department, now operating from a position of security, entered into what might be thought of as bargaining. Previously, the Department had created a superintendent from the rank of principal in one district and imposed him on to another as superintendent. Now the Department presented the Victoria Board with a list of three superintendents currently practising their trade in other districts and told the trustees to pick one for assistant superintendent. They chose A. J. "Jake" Longmore which was a "clever move" according to Peter Bunn. It was no doubt a fortunate choice for the Victoria system

insofar as Longmore, young, confident, and charismatic, will unques-

tionably achieve many worthwhile changes in the organization. But to

use an image of a thermostat, popular in cybernetic theory, the tem-

perature was still controlled for the district by the Department.

Two other aspects of these moves appear significant.

Freeborn (op. cit.) found that outside superintendents replace the in-

cumbent within three years after a political change on the board. Bunn

and Porteous were elected in 1961; Longmore became superintendent

in 1969. There were actually three extra years imposed on the district

while Chell served out his caretaker function and it should be under-

stood that the extra years were for the well being of the Department,

not for the education of children in a school district. It is ironical

that Gough would have resigned in two years given the normal schedule

for these things, hence, Longmore could conceivably have been super-

intendent a year earlier had there been no investigation. The second

aspect is that the status quo ante returned for the Department.

Third, and last in the moves of this period, John Gough

himself made a significant appointment as he was fading off into retire-

ment. On the same evening that Gough resigned, the Director of

Secondary Instruction also tendered his resignation. Before his term

as Director, this man had been the principal of the largest secondary

school in the district, Victoria High School. His position as principal

was taken by his vice-principal, Thomson. Gough appointed Thomson

to the position of Director of Secondary Instruction, an appointment

that follows the established route in almost a feudal, rather than

bureaucratic, manner. Response by the trustees defines their concept

of change: first, they attempted to persuade the Director to reconsider

and remain in his position, though he declined; second, they accepted

the promotion by Gough of the principal. One needs to recall the poetic

mataphors of Hartrick and Downey for describing the group in Victoria

--"inbreeding, " "cross-fertilization, " "parochialism" and so on-- and

therefore, one can say, the position stayed in the family.

Moreover, the new Director took a drop in salary as he

moved upward in the hierarchy. His salary as a principal in January

1966 was $15,776; in September 1966, as a Director, it was $15,296.

In order to prevent this sort of thing happening again, Trustee Curran

as Chairman of the Finance Committee provided a mechanism for

salaries during a board meeting. (This also serves as an example of

the value of standing committees to the educators.) The mechanism

reads:

> "Mr. Curran, Chairman of the Finance Committee, then
> presented for the approval of the Board a formula for a
> salary schedule for the five Division Heads who are not
> members of the G. V. T. A. Basically, the salary of the
> Director of Secondary Instruction would be set at a per-
> centage of, and slightly in excess of, the salary of the
> highest paid secondary school principal in the District,
> and the salaries of the four remaining Division Heads
> would then be established by applying a percentage of the
> established salary for the Director of Secondary Instruc-
> tion as outlined in the formula...." (School Board Minutes)

Mainly, Curran presented for ratification a policy which effectively en-

ables members of the central administration to gain salary increases

without bargaining for it themselves. But more significant, the bar-

gaining is done for them by the powerful pressure of the entire teaching

population. It would be helpful, of course, if they would pay dues.

The appointment of the Director of Instruction serves as

a transition for the discussion of those changes specifically involving

internal manipulations by the districts educational staff in the central

administration.

II. The Central Administration

At the time of the investigation of the Greater Victoria

School District, the central administration was housed in Craigdarroch

Castle. It is an actual castle, built by an eccentric philanthropist at

the turn of the century. By the summer of 1967, the administration

moved to new quarters. These were the Paul Building which was con-

structed on the former campus of Victoria College. The main college

building was left standing and adjoins the Paul Building. The surroun-

ding area is pleasant and spacious with lawns and flower beds. Interes-

tingly, the castle became a free school after the administration moved

out.

In this section, it is intended to discuss the changes in the

central administration. It is necessary to present these briefly and

selectively, for in truth, there is much material for the discussion.

Indeed, the central administration is a topic that could reasonably serve

as another thesis. One division chosen is the newly created division

of Special Education Services which grew beyond probably even Hartrick

and Downey's expectations. Another is the division for Adult Education,

and finally the department of Buildings and Grounds.

Special Educational Services Division. There is an annual report pub-

lished by the educators for the trustees in which each division makes

its claims towards progress on the basis of its past achievements.

Such is the report of 1967-68 from which these comments are taken.

In their Report, Hartrick and Downey recommend the Director who

would occupy the position be given authority and responsibility for ex-

tending special services as circumstances warranted. And it was al-

most a certainty, they said, that such services needed to be expanded.

(p. 60) The Director of Special Services, in the publicity booklet,

astutely praises the board for its public service, presents a rationali-

zation for the service offered, and thereby supplies the trustee with a

suitable explanation for his constituents who are paying the bill. Thus,

he notes, that it was "the opinion of the Board that special educational

services should be expanded" and therefore, expansion was the "key-

note" of the Division during the 1967-68 school year. And so indeed it

was. The functions, either newly created or captured from other

social agencies, are listed below. After each function, the Co-

ordinator's comments, taken from the larger context, serve as indica-

tors of personnel added, functions performed, and future directions.

     1. Psychological Services:

       "The appointment of an educational psychologist and the

assignment of a psychometrist has made it possible to do a great deal of individual testing to help in the diagnosis of student problems..."

2. School Social Work Services:

"The school year 1967-68 saw the introduction of special counsellors at the elementary level. Two School Social Workers were placed on staff... It soon became apparent that two such people could not possibly handle all cases referred by all schools.

"A special counsellor was retained...here too, it has become apparent that the need is for more of these qualified and specialized people..."

3. Special Class Services:

"Thirty-seven of the School District's teaching staff were engaged in teaching special classes...under the direction of a Supervisor of Special Classes."

4. Learning Assistance Services:

"We believe that the early years of a child's education are crucial years... Learning Assistance Teachers are currently located in several of the elementary schools. In the next few years it is proposed that the network of Learning Assistance Teachers be expanded so that one might be proposed more available in each large school... As a longer range goal, it is that a Learning Assistance Center be developed..."

5. Health Services:

"Dental services have been increased in the District to three full-time dentists and dental assistants..."

6. Speech Therapy Service:

"The case load for the one half-time speech therapist serving this School District is such that there is a pressing need for additional personnel in this area..."

7. Attendance Services:

"The Board employs an attendance counsellor whose

primary responsibility is to make sure that every student stays in school for at least the legal minimum years required by law. "

8. Testing and Research Services:

"Quality is the concern of the educator just as much as it is the concern of the manufacturer of a commodity... The District maintains a Testing and Research Department which offers to principals and teachers in the schools a district-wide group testing program aimed at providing quality control in education and specific information relating to each student in the school system.

"The Supervisor of Research and Testing has been personally involved in a computer feasibility study in order to determine the economic and practical feasibility of moving toward greater use of computer techniques in a wide range of educational and administrative activities. "

In recommending the creation of a new division, then,

Hartrick and Downey gave rise to a whole new bureaucracy complete

with dentists, social workers, supervisors, and a testing division.

Presumably the latter would scientifically prove any new needs for the

system which the Board might then adopt. What appears to have taken

place among the trustees in the aftermath of this investigation is a

form of catharsis during which period the professionals have aggrandi-

zed almost at will. Nor does the Co-ordinator show intentions of rest-

ing after his busy year.

One could suggest rather than duplicating functions by

capturing those of existing community agencies, the Co-ordinator might

have chosen to relate these agencies to school needs. Thus, he could

have facilitated community participation by strengthening the links to

existing community services. One problem with expanding the

facilities from this origin concerns the policy space of the overlapping

functions. (Downs, p. 212) The welfare function performed by the

educational organization has a certain location in policy space in rela-

tion to the function of the community welfare agencies. This leads to a

form of territoriality, long observed by ethologists, through which offi-

cials in the agencies spend a considerable portion of their time manipu-

lating conditions to protect their interests. Not only is this a diversion

from their social functions, but territorial sensitivity produces an un-

certainty and anxiety within the various officials which leaves the agen-

cies verging on paralysis when new services are clearly required. As

for the Co-ordinator, one can say that he has gained in prestige and

status with the incorporation of dentists and the like into his barony, but

the penalty for this expansion is eternal vigilance on his part as well as

indefinite growth to satisfy the ambitions of those under him. Unless

the involved parties do co-operate in allowing him to take over their

functions, which seems unlikely, conflict is then an inevitable outcome

-- and one that can be traced back to the Hartrick-Downey Report.

Adult Education Division. The Director of Adult Studies in this year

turned his division into an institution and called it "The Institute for

Adult Studies. " It was observed in the introduction to this section that

the former college building still stands on the property, adjacent to the

Paul Building. The Institute for Adult Studies is located in this build-

ing and the Director occupies the office which once belonged to the

president. Again, as with the Division of Special Education, the Director

either captured functions normally being performed elsewhere or added

new functions that he felt should have been performed. Indeed, his re-

port is premised on growth which is used to rationalize imperialism,

thus:

> "If growth is any criterion for evaluating community ac-
> ceptance, the Adult Education programme appears to be
> filling a need in this area. Attending night school is an
> 'in' thing to do.
>
> "Last year a total of seven thousand four hundred and
> fifty-five registrations were made in four hundred and
> ninety classes of five or more sessions and another six
> thousand six hundred and forty-seven attended short
> courses, films, seminars and counselling sessions.
> Combined with one thousand nine hundred and fourteen
> registrations for the Institute of Adult Studies, a total of
> sixteen thousand and sixteen registrations were made."

If the content of these paragraphs appear unusually difficult to grasp,

it is probably the excessive use of numbers which forms the content.

The Director concludes his report by observing that if the Institute is

to fulfill its role to the community, it must move ahead by broadening

and updating its academic programs.

Clearly, then, both departments expanded after the resig-

nation of Gough. Analysis would show similar expansion in the other

Departments. However, the point to observe is that the scope of func-

tions increased even before the new superintendent assumed office.

Buildings and Grounds. The supervisor of buildings and grounds is

spoken of with some awe within the organization. His department func-

tioned through all of the warfare between the superintendent and the

trustees because, as he observed, the work had to be done. It is

interesting that he is not in the educational branch of the organization but rather in the business side and depends a great deal on expertise in such matters as construction of new schools, renovations, additions, and maintenance.

In all, the investigators spend a half hour talking to him about his department and decided that it was well run. No mention of it appears in the report yet it is a department of 250 personnel including carpenters, electricians, plumbers, painters, engineers, draughtsmen and so on. Much of the conflict in the Victoria organization centers on this department insofar as the expansions already discussed require additional facilities. However, in truth, the conflict is not quite the reluctance of the supervisor to accommodate to the wishes of the directors as many suppose, but is rather a conflict of technical limitations. For example, the teachers in the Adult Education Division required a door and it seemed a small enough request. But the budget for that year had been set, and the door would have cost more than they thought insofar as there are building codes and fire regulation to contend with.

One official suggested that Buildings and Grounds was not investigated because the Department of Education informed the investigators not to, and this may be so. It seems more likely, however, that Hartrick and Downey simply lacked the expertise to assess the complex affairs of the building trades. And it is obvious that the supervisor is a competent man. However, one could reasonably ask the investigators to assess whether a bureaucracy of these dimensions is

necessary or whether some facets of it could not be performed more

efficiently and economically by contracting for the specific job.

A final consideration of the Buildings and Grounds Depart-

ment and the Adult Education Division needs to be made at this time.

It concerns an observation by Hartrick and Downey regarding commu-

nicating. Nothing, they say, will cause an organization to malfunction

quite like faulty communication will:

> "Without communication common goals cannot be estab-
> lished; individuals cannot be stimulated to maximum
> effort; the contributions of various people cannot be co-
> ordinated; and the day-to-day directives essential to the
> running of an organization cannot get through. " (Report,
> p. 66)

This is only partially true. First, one would have diffi-

culty determining a common goal that would hold for the Directors of

Adult Education and the Supervisor of Buildings and Grounds. For

example, the Director of Adult Education needed additional classrooms

at the time of the Czechoslovakian crisis when immigrants arrived in

this country. It was necessary to provide them with assistance in

learning to speak English. It is certain that the Superintendent did not

want to allow the Director to expand the existing classrooms inasmuch

as he told this to the Director. And it is equally certain that the Super-

visor of Buildings and Grounds had committed his resources elsewhere,

and that he was unsympathetic to the Director's interests. Here, then,

is a case where there is no common goal but rather individuals pursu-

ing in a rational and self-conscious way antagonistic strategies.

Similarly in the debate over the door between classrooms in the Institute of Adult Studies, there is a conventional wisdom operative in seasoned administrators wherein one does not ask about the feasibility of doing something but rather one does it and communicates later. Had the Director so chosen, it seems possible that he could have hired a carpenter himself and had the door installed, perhaps at the price of one hundred and fifty dollars. Hartrick and Downey conceptualize conflict as something pathological to be cured by better communication. In truth, not all conflict can be reduced to communication problems. There are clearly times when these men avoid conflict by not communicating. There are also times when, in pursuit of his own goals, an official who communicates with another simply reveals the weakness of his position. Conflicts of this nature result from differences of interest rather than from the fact that one official does not understand the problems of another.

III. Outside Agencies

Downs' proposition on an outside agency making recommendations that would depart significantly from the status quo was not borne out by this study of the Victoria School System. However, the investigation itself, viewed as a rationalization for purging officials, is an effective vehicle for change. There are forces set in motion by an investigation, independent of the actual recommendations of consultants but which operate more in the area of fear, anxiety, and threat to

produce change. From this perspective, the consequences of an investigation has psychological significance offering a form of imaginary payoff for the organization. The benefits for the trustees who initiated the investigation were psychical, whereas tangible benefits were conferred on the Department and on the members of the Central Administration. It is doubtful whether any effects of the investigation percolated down through the levels to influence the quality of instruction within the schools.

If there is a central problem that has emerged from the study of this investigation, it would center on the preferred style of politics practised by the educators. Left to their own devices, the professionals tend to value procedures which safeguard the educational system from the normal political process. Trustees can function as powerful change agents within a district because of their legal status, fiscal authority, and community support. Moreover, they possess the potential power of carrying conflict outside the institutional structures and into the community. There are no easy answers to this particular problem. But, clearly, to shift them away from interfering with the organization as in the intent of the Report, is only to offer short run adjustments which leaves the underlying trouble to be solved in the future. In addition, the penalty for shifting trustees out of the organization is a loss of community support for the schools. This will be particularly noticeable in matters of a referendum which provides additional finances for the organization and also in public responsiveness to

the educators in matters of innovation.

Local school districts have an inherent capacity for changing themselves. There is a rhythm to the needs for change of personnel which results in an involuntary superintendent change-over as the school organization aligns itself to the changing needs of the district. The factor preventing these normal forces from operating within the provincial educational system is the appointment of superintendents by the Department of Education. One need not conjure up the Department as evil anonymous rulers. But the Department does have an enormous potential for control of the system, which is also to say that the members of the Department have a responsibility for the well-being of the schools in the province. In the case of the Victoria School District, there was clearly an abdication of that responsibility in not moving the superintendent years before the investigation. Nor does it seem likely that the Department will voluntarily relinquish the control of local districts to prevent this occurring again. Yet the pressing need is obviously for the right of local districts to choose their own superintendent who will in turn represent them and not the Department. At stake is the legitimacy of the local organization, the quality of the superintendency, and the viability of the organization. In terms of this issue, the Hartrick-Downey investigation is entirely irrelevant.

It seems unlikely that outside consultants can effect much in the way of significant changes in local school districts. However, that is not likely to deter the professionals from doing more of them.

Therefore, the following comments might be of some assistance. First, the Report is too long, too technical, and appears to have been designed more to enhance the writers than communicate to the Board. Few people will read it other than keen students of bureaucracy. Certainly members of the Board read little of the tedious text. And it would be irrational of them to spend energy learning to do so. Therefore, one might suggest that there is wisdom in a shorter version--perhaps twenty pages-- which communicates efficiently to these busy people.

Second, investigators need to be aware that they are bearers of an ideology. It is not necessary for them to hide under an umbrella of scientific neutrality and pseudo-objectivity. But it is necessary for them to be aware that investigations are political in content, arouse anxieties in the teaching body, and excite local reporters. However pure their intentions, investigators must perforce awaken these dormant passions. Third, investigators should seriously consider the possibility of focussing on the child. From this perspective, it is quite conceivable that much good would result insofar as the level upon level of bureaucracy is visible in terms of a weight on the system. Indeed, there are supervisory positions which could be eliminated in these school systems without loss except to the incumbent and it would help unfreeze the structure and process of education.

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    document in libraries. It is, however, available from the
    Greater Victoria School Board and the British Columbia
    Teachers' Federation.