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**TRADE-OFF OR TRIPOD:**  
**THE EDUCATIONAL POLICY VALUES OF**  
**EQUALITY OF OPPORTUNITY, COST EFFICIENCY AND DIVERSITY**  
**OR LOCAL CONTROL, IN SCHOOL DISTRICT SYSTEMS**

by

Zane Spencer

B.A., Simon Fraser University, 1977.

A THESIS SUBMITTED IN PARTIAL FULFILLMENT OF  
THE REQUIREMENTS FOR THE DEGREE OF  
MASTER OF ARTS (EDUCATION)  
in the Faculty  
of  
Education

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SIMON FRASER UNIVERSITY  
August 1986

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ISBN 0-315-36217-0

APPROVAL

ii

Name: Zane E. Spencer  
Degree: Master of Arts (Education)  
Title of Thesis: Trade-Off or Tripod: The Educational Policy  
Values of Equality of Opportunity, Cost  
Efficiency and Diversity or Local Control in  
School District Systems

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Title of Thesis/Project/Extended Essay

TRADE-OFF OR TRIPOD: THE EDUCATIONAL POLICY VALUES OF EQUALITY OF OPPORTUNITY,

COST EFFICIENCY AND DIVERSITY OR LOCAL CONTROL IN SCHOOL DISTRICT SYSTEMS

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A B S T R A C T

The purpose of this thesis is to provide educational policymakers at the local, provincial or state levels, as well as other stake-holding audiences, with an analysis of issues which impact upon value questions that have arisen in school district reorganization proposals, studies and policies in North America. In general, however, special attention is paid to studies which focus on British Columbia.

This paper examines three values--equality, efficiency and diversity--which have reflected in the past, and continue to reflect, the major organizing values in the design and structure of school systems in North America. It appears that a longstanding and widely accepted assumption of researchers and policy-makers is that the values of equality, efficiency and diversity are competing values in the sense that any plan to increase the emphasis on one of the values will necessarily detract from one or both of the others. This study argues that these values are not necessarily competing values, but, rather, coexisting values which may sometimes be mutually sustaining and which ought to be emphasized concurrently in the design and organization of school districts.

This study examines the differential emphases assigned to the three values--equality, efficiency and diversity--in the history of school district reorganization in B.C. between 1925 and the present. Additionally, the paper explores the current literature on school district reorganization, focusing on each

of the three value areas. Then, drawing upon the literature on school finance, school effectiveness and organizational change, this study explores the linkages between the values equality, efficiency and diversity. Finally, the paper offers suggestions to the British Columbia Ministry of Education and to local school boards concerning possible policy options which maximize all three values simultaneously, or which increase the emphasis on one or two of the values without damaging the status quo with regard to one or both of the others.

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**TO MARTY**

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**ACKNOWLEDGEMENTS**

I am immensely grateful to Dr. Peter Coleman for his advice and encouragement, both of which were invaluable in the preparation of this thesis. I also owe a debt of gratitude to my beloved sister, Marty, who typed this paper. I am sure that all of the questions she was afraid to ask about school district reorganization have been answered. And then some.

TABLE OF CONTENTS

Approval Page.....	ii
Abstract.....	iii
Table Of Contents.....	vii
List Of Figures.....	x
Chapter One: Introduction.....	1
The Question: Are Equality, Efficiency, And Diversity Competing Values, Or, Co-exist- ing And Sometimes Mutually-Sustaining Values?.....	4
Purpose Of The Study.....	8
Definitions Of Terms.....	9
Approach To The Study.....	13
Organization Of The Paper.....	14
Chapter Two: History.....	18
Putman and Weir's <u>Survey Of The School System</u> (1925).....	20
<u>The Kidd Report</u> (1932).....	22
H.B. King's <u>School Finance In British Columbia</u> (1935).....	25
<u>The Cameron Report</u> (1945).....	28
<u>The Chant Report</u> (1960).....	31
Summary And Analysis Of Reports Commissioned By The Provincial Government.....	33
B.C.S.T.A. Case Study Reports on School District Reorganization.....	37
<u>The Armstrong Case</u> (Robinson).....	38
<u>The East Kootenay Case</u> (Levirs).....	41
<u>The Mid-Island Case</u> (Stibbs).....	42
<u>The Mid-Island Case</u> (Coleman).....	44
<u>The North Shore Case</u> (Plenderleith).....	47
Summary and Analysis Of B.C.S.T.A. Case Study Reports.....	49
Discussion.....	51

Chapter Three: Equality.....	53
Definitions Of Equality.....	55
Equality And The Locus Of Control.....	61
Equality And Financial Distribution Systems.....	64
Hope, Uncertainty and Disillusionment: The Pursuit Of Equality.....	70
Equality Of Condition vs. Equality Of Opportunity.....	73
Summary.....	74
Discussion.....	76
Chapter Four: Efficiency.....	84
Origins Of The Concept Of Economy Of Scale.....	86
Economy Of Scale Studies In Education.....	86
Problems Of Measurement, Data Collection and Analysis.....	91
Problems With Agreement On The Definition Of Terms.....	94
Problems With The Definition Of Size Components.....	95
Generalizability Of Findings In Economy Of Scale Studies.....	98
Assumptions About Equal Competence Of Administra- tions.....	101
Knowledge Problems: How Resources Influence Achievement.....	102
Summary.....	106
Discussion.....	108
Chapter Five: Diversity.....	116
What is Meant By Citizen Participation?.....	118
Size and Participation: The Conventional Wisdom.....	120
Two Competing Perspectives On Local Government.....	126
What is Meant By Centralization and Decentraliz- ation?.....	128
Perspectives on Trends In Centralization and Decentralization.....	128

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Trends Toward Greater Centralization In British Columbia.....	131
Policy and Practice: Policy Values Changed In Practice.....	133
Expert vs. Lay Control In Local School Districts...	134
Conflicting Goal Perspectives: Society vs. Community.....	137
Summary.....	140
Discussion.....	142
Chapter Six: Review.....	150
Review of Discussion Sections.....	151
Toward Maximizing Equality, Efficiency and Diversity Concurrently In School District Operations: Suggestions For The Provincial Government.....	155
Toward Maximizing Equality, Efficiency and Diversity Concurrently In School District Operations: Suggestions for School Districts...	158
Possible Directions For Further Research On Value Issues.....	161
List Of References.....	165

LIST OF FIGURES

1-1	The Number Of School Districts In British Columbia: 1972-1972	3
1-2	Brown's (1968) Conception Of Three Competing Values In The Structure Of School District Systems	6
4-1	School District Size And Per-Pupil Operating Costs	89
5-1	Some Types Of Citizen Participation In School Policy Formation	119
5-2	The Relationship Between Perceived Control And Size Of Area	123
5-3	Berman And McLaughlin's (1979) Con- ceptions Of Two Theoretical States: Maintenance And Development	147

The proper calling today of sociology is the illumination of opinion. Having its point of departure in the opinion of the human beings who make up the society, it is its task to return to opinion, clarified and deepened by dispassionate study and systematic reflection....Like the philosophes (of the enlightenment) sociologists will be the commentators and the illuminators of the current scene.... They have a theory that has assimilated the best in the ideas in the enlightenment and strengthened it by progress in a great variety of disciplines cultivated since the eighteenth century. Some sociologists might feel that this definition of the calling of sociology is one that undoes the progress of the subject. On the contrary, it shows the right direction for a subject that is at once a science, a moral discipline and a body of opinion.

-E. Shils, "The Calling of Sociology"  
in T. Parsons et al., Theories of Society.

Jonathan Sher's (1977) Education In Rural America: A Reassessment of Conventional Wisdom points out that "the most successfully implemented educational policy of the past fifty years has been the consolidation of rural schools and school districts" (p. 43). The search for the ideal school district has resulted in the creation of fewer and larger school districts in a host of jurisdictions in Canada and the U.S.. The amalgamation of school districts has long been deemed a panacea to correct inequalities and inefficiencies, particularly economic inefficiencies, and to rid communities of "the dull parochialism and attenuated totalitarianism that (characterize) public education." (Lieberman, 1960, p. 34).

Since the early 1930's, British Columbia, like so many other provinces and states, has implemented policies on school district organization (and reorganization) which have produced,

overall, school districts which are larger in area and student population and fewer in number. Figure 1-1 shows a net decrease, over the forty year period, 1931-1971, in the number of school districts in British Columbia, from an all-time high in 1931 of 830 districts, to 77 districts in 1971. At present (1985), British Columbia has 75 school districts.

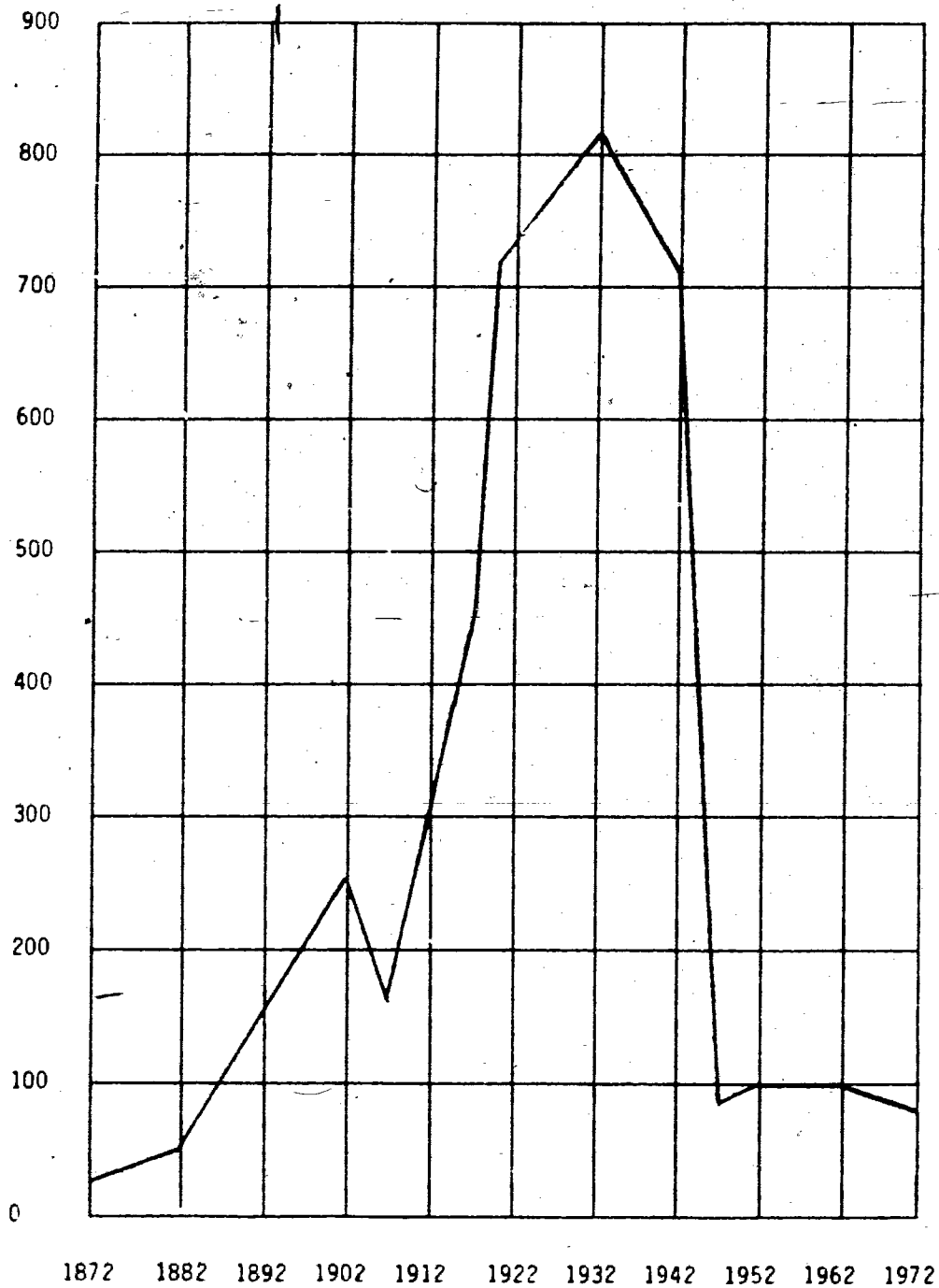
It could be argued that policy-makers in British Columbia, as elsewhere, who have for forty-and-more years favoured the creation of fewer and larger school districts, have fallen victim to one of the more salient fallacies of educational policy-making outlined by Kerr (1976): the "Blinder-View Fallacy". This fallacy likens policy-makers who limit their field of vision by concentrating on one or a small number of goals to the exclusion of all others, to dray horses with blinders on to "prevent them from seeing anything that might divert their attention from seeing directly where they are supposed to be headed" (Kerr, 1976, p. 201).

It might also be argued that the question of school district organization is never really a closed one because, as Robinson (1970) points out:

changing political, economic, social and educational forces operating in society give rise to a continuing need for school district reorganization. What may be an effective and an efficient school district unit today can be made into an ineffective and inefficient unit through a change of forces operating in society (p. 3).

Linking Kerr's conception of the "Blinder-View Fallacy" and Robinson's observation that the question of school district reorganization is never definitively answered over the long

THE NUMBER OF SCHOOL DISTRICTS IN BRITISH COLUMBIA: 1872 - 1972



SOURCE: Ministry of Education. Public Schools of The Province of British Columbia: One Hundredth Annual Report. Victoria, B.C.: Queen's Printer, 1972



term, with a recent policy proposal of the British Columbia Ministry of Education, lends further justification to the choice of topic in this analysis. As Coleman and LaRoque (1984) note:

the most recent commission in British Columbia, the Sager Commission, was appointed in Spring, 1983, but was dissolved before reporting: it was investigating (school district size and operating costs) as an aspect of the restraint program in the province. Thus, the recent policy proposal regarding a further round of school district amalgamations can be considered a traditional response on the part of government (p. 5).

The decisions to implement consolidation policies have always reflected political choices, even if some of the arguments for "bigger is better and cheaper" were, as Sher (1977) notes, "cloaked in scientific rationality" (p. 77). As Knorr (1977), Weiss (1977), Rein (1976), Guba and Lincoln (1981) and others have pointed out, in discussions on the policy-making process, the role of basic values in that process is too frequently overlooked. Weiss has called for the recognition on the parts of both researchers and policy-makers that "all choices of emphasis...are governed by some set of values" (p. 3).

**THE QUESTION: ARE EQUALITY, EFFICIENCY AND DIVERSITY COMPETING VALUES, OR, COEXISTING, AND SOMETIMES MUTUALLY-SUSTAINING VALUES?**

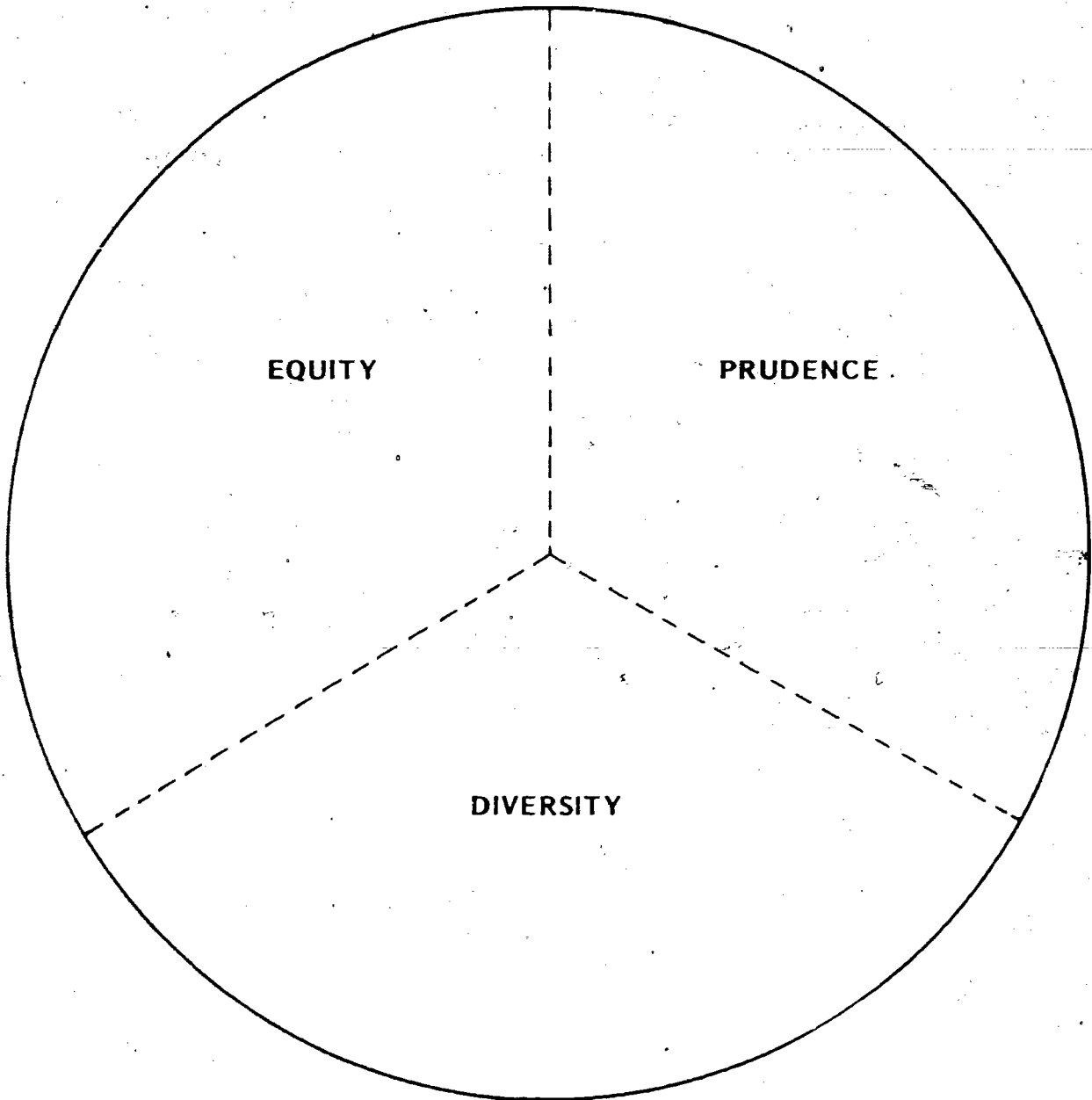
That three values -- equality, efficiency and diversity -- have reflected in the past, and continue to reflect, the major organizing values in the design and structure of school systems

is evident in the works of James (1980); Benson (1978); Garms, Guthrie and Pierce (1978); Brown (1968); and Rideout (1980). While these analysts may use terms other than "equality, efficiency, and diversity," the basic values are very similar. James uses the terms, "equity, efficiency and liberty (p. xiii)"; Benson, "equity, efficiency and choice (p. 219)"; Garms, Guthrie and Pierce, "equality, efficiency, and liberty (p. 18)"; Brown, "equity, prudence and diversity (p. 1);" and Rideout, "equality, efficiency and liberty" (p. 42).

A long-standing and widely accepted assumption of researchers and policy-makers with regard to value questions in school district reorganization proposals and policies is that these three values are competing values in the sense that any plan to increase the emphasis on one of the values will necessarily detract from one or both of the others. An analysis of the history of school district reorganization proposals and policies in British Columbia (Chapter 2) demonstrates that the search for the ideal school district has frequently been governed by the assumption that equality, efficiency and diversity are necessarily competing values. As Brown (1968) has conceived it (Figure 1-2) each of these three values occupies a space in which each touches the other. As it stands, the figure gives equal emphasis to each of the three values. Additional emphasis can be given to any one or two of the value areas, but only at the expense of one or both of the others. According to Brown (1968), different jurisdictions, provinces or states, may choose to assign different emphases to

FIGURE 1-2

**BROWN'S (1968) CONCEPTION OF THREE COMPETING VALUES  
IN THE STRUCTURE OF SCHOOL DISTRICT SYSTEMS**



**SOURCE:** Alan Brown, Changing School Districts In Canada. Toronto: Ontario Institute For Studies In Education, 1968

each of these three value areas and these emphases may change over time.

The assumption that equality, efficiency and diversity are necessarily competing values is questionable since it is difficult to argue that any one values is more important than any or both of the others. Each and all of the values are critical in the design and structure of school districts. Equality criteria are essential because "schooling is an important commodity, and (since) the returns to investments in schooling are significant both for society and for individuals," this commodity must be distributed in a fair and equal manner (Geske, 1983, p. 84). Efficiency criteria are important since it must be assumed that any given jurisdiction has a limited amount of scarce real resources to spend on education and governments, at all levels, are morally bound to maximize goal attainment while spending tax dollars prudently. Diversity criteria, which subsume the notions of citizen participation and local control, are crucial because communities, like students, differ markedly and local school systems require sufficient autonomy to adapt programs and services to the needs and preferences of the residents in the communities they serve.

Because of the tremendous importance of each and all of these basic values, it will be argued in this thesis that these values are not necessarily competing values, but, rather, coexisting values which may sometimes be mutually-sustaining and which ought to be emphasized concurrently in the

development and organization of the ideal school district. The ideal school district would therefore be one which offers high quality services to all students with a maximum degree of economic efficiency and which possesses a high level of diversity in programs and practices.

Thus, the optimal policy options for school district reorganization schemes are those in which increased levels of equality, efficiency and diversity are joint products. Other policy options which should be considered include those which would bring about (a) improvements in the equalization of opportunity, without causing decreases in either levels of efficiency, or diversity, (b) improvements in efficiency, without causing decreases in either the equalization of opportunity, or levels of diversity, and, (c) improvements in levels of diversity, without causing decreases in either the equalization of opportunity, or levels of efficiency. Similarly, policy options which would bring about improvements in any two value areas simultaneously, without damaging the status quo with regard to the third value area, ought to be considered preferable to policy options which promote improvements in one value area, while damaging one or both of the others.

### PURPOSE OF THE STUDY

This thesis will examine three values -- equality, efficiency, and diversity -- and assumptions about these values which have dominated proposals, studies, and policies

concerning school district reorganization in North America. This study focuses first on the trends, as well as the differential emphases assigned to these values in the history of school district reorganization in British Columbia. The picture which emerges indicates clearly that the major studies conducted in British Columbia, between 1925 and the present, assumed, openly or tacitly, that the three values -- equality, efficiency and diversity -- were competing values in the sense that one or two of the values could be emphasized only at the expense of one or two of the others. The focus of the paper then shifts to an exploration of the current literature concerning the three values as they relate to themes in school district reorganization. Thus, the purpose of this paper is to provide policy-makers at the local, provincial or state levels, with an analysis of issues which impact upon value questions that have dominated school district reorganization proposals, studies and policies in North America. The primary focus of the paper, however, is school district reorganization in British Columbia and, in general, studies from other jurisdictions have been examined to provide points of reference, comparison and contrast, which help clarify the situation in British Columbia.

### DEFINITION OF TERMS

It is necessary at this point to provide definitions of key terms which will be used in this analysis. First, broad operational definitions of the concepts of equality, efficiency

and diversity will be established and then more specific definitions of other terms used in this analysis will be given.

The principle of equality, frequently referred to in the education literature as equality of opportunity, is one of the most enduring values in proposals and policies for the organization of school district systems. Burbules, Lord and Sherman (1982) provide us with three broad definitions of the term. Historically, equality of opportunity has meant the equalization of inputs among school districts, schools or communities. This definition rests on the notion of "sameness" in terms of service provision. A second definition of equality of opportunity acknowledges that "sameness" may not produce equality. Those who subscribe to this definition have drawn a distinction between "sameness" and "fairness" and hold that equality of opportunity may require that differential amounts and types of services be provided to students, based upon criteria for determining degrees of advantage or disadvantage in the particular students concerned. Proponents of this second definition define equality of opportunity as the "provision of alternative routes of access to different goals which are equivalent by some standard of judgement." A third definition of "equality of opportunity" concerns itself with outputs, products or results.

This version is straightforward. What one hopes for is a strict equalization of outcomes; by some measure they should be identical. For example, in education one might desire an equalization of reading ability in school children (Burbules, Lord and Sherman, 1982, p. 182).

All three definitions of the term "equality of opportunity"

will be discussed in chapter three. It should be noted, however, that in chapter two, which discusses the history of school district reorganization proposals in British Columbia, it is clear, albeit implied, that "equality of opportunity" means "sameness" in terms of levels of service provision.

The second value, efficiency; which appears to have received differential emphasis in proposals and policies concerning the organization of school district systems, might best be defined relative to the notion of economic inefficiency.

If a school system is attaining more than it used to or more than another school system given the same expenditure level, it may accurately be said to have achieved a degree of efficiency. Similarly, if the school system is attaining the same level of performance as it used to or as another system is, given a lower expenditure level, this too can be considered efficient (Sher, 1977, p. 52).

It must be noted, however, that spending less to attain less is a corruption of the concept and leads into the realm of false efficiencies.

The principle of diversity, while receiving considerable attention in the literature on effective schooling, appears to have been valued least of the three values (equality, efficiency and diversity) in proposals for, or policies on, the organization of school district systems. In simple terms, "diversity" means "variety," and has been seen to conflict with notions of equality which imply "sameness." "Diversity," however, might best be defined within the context of this analysis as the provision for differences among school districts based upon the kinds of differences which exist among



the communities they serve. To emphasize diversity as a value in a school system organization scheme means to encourage citizen participation in decision- and policy-making, local control (with real decision-making power held locally) over central control, and structures which allow for the adaptation of school systems to their communities, and to changes in those communities, over the adoption of outside goals and standards of measurement, or the maintenance of the status quo.

In addition to the three major value areas which have been defined operationally, six terms which will be used throughout this thesis require clarification. A school district is a single geographic and administrative unit charged with the task of providing educational services to the community or communities within its boundaries. A school district system is a system of school districts, encompassing all of the school districts in a given jurisdiction, such as a province or a state. The term school district organization is the process or plan which determines school district boundaries in a school district system. Technically, school district organization can really only take place once in a jurisdiction where school districts did not previously exist. After a jurisdiction has instituted its first plan for the organization of school districts, any changes to the original plan will be covered by the term school district reorganization. In this analysis, school district consolidation and school district amalgamation will be used interchangeably; both refer to the combining of two or more school districts, or parts thereof, to form a new

school district or new school districts, larger in student population and/or geographical size than their predecessors.

### APPROACH TO THE STUDY

In order to provide policy-makers at all levels with a discussion and analysis of issues which impact upon value questions in school district reorganization proposals and policies, this thesis draws together existing concepts and research findings from a variety of disciplines including education, political science, policy development and analysis, organizational theory and economics.

Given this interdisciplinary approach, it is clear that to examine values in school district reorganization proposals and policies is to be presented with a myriad of complex issues and questions with a seemingly endless number of potential interconnections. Therefore, difficult and conscious choices had to be made throughout the preparation of this thesis about which issues would be selected for discussion and analysis, the degree of emphasis (or space) to be devoted to each, the order in which issues would be presented, and which overall structure or framework would be used to contain the discussion and analysis.

Basic decisions about what would be discussed and about the order and shape of that discussion were influenced in large measure by:

1. a preliminary study of policy development theory,
2. an extensive (but by no means exhaustive) review

of the very diverse literature on school district reorganization,

3. an intensive study of all of the major reports commissioned by the British Columbia Government or Ministry of Education between 1925 and the present which set out to examine the school system, school finance or educational finance, as well as five case studies of school district reorganization commissioned and published by the British Columbia School Trustees' Association in the early 1970's, and
4. eight years experience in a small, rural school district in British Columbia, participating in and observing the interactions among the schools and the community in a small town.

The results of the choices made regarding content cannot really be judged to be right or wrong, but only to be more or less useful. Similarly, with regard to the structure or framework upon which the content was hung, Anthony's (1965) comment is relevant:

Isolated experience and discrete bits of knowledge are not very useful. When organized into some kind of pattern, however, the pieces often illuminate one another.... The very act of organization may show that the framework will have served a useful purpose if it prepares the way for a better one (p. viii).

#### ORGANIZATION OF THE PAPER

This paper is divided into six chapters. Chapter 1 introduces the central issue with which this paper concerns itself-- values and assumptions about values in proposals and policies concerning the reorganization of school district systems.

The second chapter explores the history of commissioned proposals and plans for school district reorganization in

British Columbia. The purpose of this chapter is to examine the tracks over which we have travelled, the proposals, decisions and policies which have emerged in the past, in order to gain insights into the value systems of the individuals and groups who made those proposals and decisions and developed past policies. The second chapter shows that, of the three basic values which have dominated school district reorganization proposals, equality of opportunity has received the greatest emphasis. Economic efficiency has always been an important value, but seems to be emphasized or de-emphasized, historically, in relation to economic conditions in the Province. Diversity seems to have been the least emphasized of the three values.

The third, fourth and fifth chapters examine questions and issues which emerge from the current literature pertaining to each of these three value issues. Chapter three looks at studies on the issue of equality of opportunity. One of the most important contributions of the recent literature on equality of opportunity may be in the realm of definition. Thus, while there are perhaps few who would state that equality of opportunity is not a legitimate goal of school system reorganization schemes, it is important to have a common language, so that when we say we value "equality of opportunity" we know more precisely what we mean by the term and hence what we value.

The fourth chapter critically examines what might be regarded as the most influential body of information in terms

of school district reorganization --the studies of scale economies. Proponents of school district amalgamations have long used the argument that increasing the scale (number of pupils) of school district operations could result in lower per-pupil costs. This chapter examines the origins of the concept of economy of scale and documents six major problems with the body of research on scale economies in education. A number of recent studies indicate that scale economy studies in education, upon which the conventional wisdom of "bigger is better and cheaper" rests, may be "considerably more conventional than wise" (Sher, 1977, p. 76).

Chapter five discusses issues connected with the value, diversity. This chapter examines the meaning of citizen participation and looks at the current literature on organizational size and community participation. After two competing perspectives of local government are discussed, the terms "centralization" and "decentralization" are defined and an analysis of apparently competing trend perspectives on the theme of centralization/decentralization follows. The themes of expert/lay control and society/community perspectives are also discussed. The chapter concludes with an exploration of the thesis that school districts are ineffective at meeting the needs of the communities they serve to the extent that they are unable to adapt to those communities and then change, over time, as communities and their needs change.

The sixth and concluding chapter summarizes the discussion sections at the ends of chapters three, four and five and

offers suggestions to the Provincial Government and to school districts concerning ways in which the three values, equality, efficiency and diversity, might be maximized concurrently in school district operations.

## CHAPTER TWO: HISTORY

The river flowed both ways. The current moved from north to south, but the wind usually came from the south, rippling the bronze-green water in the opposite direction. This apparently impossible contradiction, made apparent and possible, still fascinated Morag, even after the years of river-watching.

--Margaret Laurence,  
The Diviners, p. 1

As the introductory chapter to this study suggests, a longstanding and widely accepted assumption of researchers and policymakers with regard to value questions in school district reorganization proposals and policies is that three basic values--equality, efficiency and diversity--are competing values in the sense that any plan to increase the emphasis on one of the values will necessarily detract from one or both of the others. This chapter focuses on the history of school district reorganization proposals and policies in British Columbia and demonstrates that the search for the ideal school district has frequently been governed by the assumption that equality, efficiency and diversity are necessarily competing values. In addition, this chapter will offer some insights into value systems and value patterns expressed in the past, as well as create some sense of the evolution of ideas. In short, before we can establish where we are, and where we should go, we need to look at where we have been.

The sources used to establish a perspective on past views with regard to how the three basic values (efficiency, equality and diversity) have been weighted in relation to each other.

were self-selecting with one addition. They are, with one exception, all of the major reports commissioned by the Provincial Government or the Ministry of Education, which set out to examine the school system, school finance or educational finance. The one addition to these reports on schools or aspects of educational finance is entitled Report of The Committee Appointed by The Government To Investigate The Finances of British Columbia. This report, written by five prominent B.C. business executives in 1932, during the deepening years of the Great Depression, was included in this analysis because it supplies a point of view which is very different from the other four reports, all of which were written by men prominent in the educational establishment as ministry officials, professors of education, or both. The second section of this analysis examines five case studies of school district reorganization commissioned and published by the British Columbia School Trustees Association in the early 1970's.

The historical reports to be examined in the first section of this chapter, given in order of their publication are:

- 1) Survey of the School System, 1925, commissioned by the Minister of Education, written by J.H. Putman and G.M. Weir.
- 2) Report of the Committee Appointed By The Government To Investigate the Finances of British Columbia, 1932, commissioned by Premier Simon Fraser Tolmie, written by George Kidd, W.L. Macken, Austin Taylor, A.H. Douglas, and R.W. Mayhew.
- 3) School Finance in British Columbia, 1935, commissioned by the British Columbia Commission on School Finance, composed of G.M. Weir, Minister of Education and John Hart, Minister of Finance, written by H.B. King.



- 4) Report of the Commission of Inquiry into Educational Finance, 1945, a one-man Royal Commission, Maxwell A. Cameron.
- 5) Report of The Royal Commission on Education, 1960. The commissioners were S.N.F. Chant, chairman, J.E. Liersch, and R.P. Walrod.

Although these reports deal with a great variety of topics, they all address questions concerning values in the organization of the school system in British Columbia. Single, concise, quotable passages, which give some clear indication of the writers' weighting of the three values--equality, efficiency and diversity--were not to be found in any of the documents. Therefore, passages were selected from these texts for discussion here if they addressed two of these values and made some statement concerning the relative importance of one to the other, or, alternatively, if they appeared to represent the writers' perspectives or emphasis on a single value issue. It is clear that, with the exception of the 1932 report, equality, in terms of the collection and distribution of funds and the provision of services, was emphasized over the principle of economic efficiency and the principle of diversity.

#### PUTMAN AND WEIR'S SURVEY OF THE SCHOOL SYSTEM (1925)

Putman and Weir's Survey of The School System, published in 1925, is a captivating document of some 556 pages in length. The primary topic of discussion in this twenty-five chapter work might broadly be categorized as "curriculum revision." An analysis of school finance issues is given about 30 pages and

the "consolidation of schools," 3 pages. The introduction, a brief historical look at the system's first fifty years, and a subjective analysis of public opinion are, taken together, allotted about 45 pages. Clearly, equality of opportunity appears to be stressed above economic efficiency and local control.

On the subject of equality of opportunity, Putman and Weir (1925) open with:

Democratic thinkers believe, rightly or wrongly (the Survey believes rightly), in that rather commonplace philosophy, still far from realization, free education means the open door to educational and social preferment....The great majority of the citizens of British Columbia will no doubt agree with the view expressed by the president of a great modern university to the effect that: "A 'square deal' in adult life is not worth much unless there is a 'fair chance' during childhood" (p. 25).

Economic efficiency is also an important principle in Putman and Weir's value scheme. They note that

the state owes the children in assisted school areas a good education; it is morally bound to give this education without unnecessary waste of public money (p. 302).

Assisted school districts, it should be noted, were those in which the Provincial Government paid the entire cost of services. These districts tended to be rural and isolated.

On the issue of the consolidation of school districts (there were over 700 districts when the report was written) the authors' value scheme receives greater clarification. They recommend that

consolidation of assisted school districts be carried out wherever it seems educationally or financially desirable, with the approval of local boards if

possible, but in face of their disapproval if necessary (Putman and Weir, 1925, p. 302). (Emphasis added).

Clearly, then, the wishes of a local board of trustees were to be disregarded when they stood in the way of greater equality in the provision of services, or economic efficiency. It must be pointed out, here, that to say that Putman and Weir (1925) valued equality and efficiency over local control is not to imply that they did not value the principle of local control. Certainly they supported local control over central control.

Centralized control, as advocated before the Survey, would necessarily result in the establishment of a large educational bureaucracy at the Capital, which from the very nature of the case would occupy a detached and isolated position out of intimate contact with local school problems (p. 30).

Putman and Weir (1925) argued that central control and total central financial control of the system were very closely linked. They advised against the Government paying the total bill for education, as a number of briefs presented to them apparently suggested it should, advising that

it would be useless to argue that administrative and academic control might remain with the local authorities while the Government assumed one hundred per cent. of the cost of school administration. No such divorce is possible (p. 30).

### THE KIDD REPORT (1932)

The Report of the Committee Appointed By the Government to Investigate The Finances of British Columbia, referred to as The Kidd Report, named after the committee chairman, George Kidd, a prominent business executive in Vancouver, was

presented to Premier Simon Fraser Tolmie in the summer of 1932. Even after he lost the election the following year, Tolmie was still trying to disassociate himself from the 55 page Kidd Report which had "exploded like a bomb on the political stage" (Mann, 1980, p. 97). We consider this document here, because any of its recommendations were translated into practice, (they were not) but because it demonstrates a value mix which emphasizes the principle of economic efficiency far above the principles of equality and diversity. It might even be said that these latter two value principles are scarcely acknowledged. The Kidd Report, juxtaposed with the other sources used in this analysis, gives us clearer points of contrast and reference.

In The Kidd Report economic efficiency was all-important. The cost of social service programs, including education, had to be reduced. Kidd et al (1932) noted, quoting from a similar report made in England, that:

Successive governments have, without true appreciation of the economic position of the country and the financial problems arising from the war and from world conditions, embarked upon expenditures on social reforms; granted concessions to various classes of state employees; undertaken obligations to local authorities; and followed a course of increased expenditure failing to take into account the cumulative effect of their action (p. 33).

To remedy the problem of overspending on education, The Kidd Report recommended that

Should a pupil wish to attend High School after the completion of his fourteenth year, he should only be permitted to do so on paying fees sufficient to cover 50 per cent. of the entire costs of his education, including interest and sinking fund charges on

capital raised for the school building (p. 34).

Further, after the age of sixteen, 100 per cent. of the above costs were to be born by the student.

In terms of the provision of services, the Government had set student number criteria for the establishment and closing of schools. These criteria differed in rural and urban areas. The Kidd Report recommended that the number of students required to open or close a school be increased and that the increased number apply to urban and rural schools alike.

In fact, The Kidd Report questioned the "wisdom" of too many pupils pursuing high school graduation. Their time, it was suggested, might be better spent "acquiring some proficiency in agriculture or some other industrial occupation" (p. 34). It would be better for these students and the greater society if "the majority began to assist in producing the wealth now lying dormant in our natural resources" (p. 34). Kidd et al (1932) advocated a system of scholarships whereby money saved by the government, through the collection of fees and the closing of schools, could be utilized in such a way that only those "pupils of exceptional ability and promise may have an opportunity of enjoying the full benefits of our complete educational facilities" (p. 34). Clearly, Kidd et al (1932), unlike Putman and Weir (1925), and indeed unlike any other report which shall be examined in this paper, advocate the provision of educational services, not to every child, but only to those with "exceptional ability and promise" (p. 34).

On local control, The Kidd Report recommended the

abolition of school boards in municipal districts. It advised that greater economic efficiency could be achieved if the government agency which spent tax dollars, also had to collect them. Because in municipal districts the municipal council collected taxes and the school board, estimating its costs, requisitioned, from the municipality, funds to cover its costs, the school board was deemed, at least by Kidd and his associates, not to be responsible to taxpayers for the amounts of its expenditures. In municipal districts, therefore, municipal councils should govern the school system, The Kidd Report recommended. In rural school districts, the report recommended the retention of school boards but advised that the expenditures of those boards (most of which were funded by the Province) "should be made subject to the control of the Education Department" (Kidd et al, 1932, p. 35).

In sum, it is clear that Kidd emphasized economic efficiency above all else, and a meritocracy in place of a system where opportunities for all students were valued. The "special status" of education in the local government system was to be abolished in municipalities and greater central control was advocated for rural districts.

#### **H.B. KING'S SCHOOL FINANCE IN BRITISH COLUMBIA (1935)**

School Finance In British Columbia, written by H.B. King, technical advisor to the Commission on School Finance, was submitted in 1935 to George Weir, Minister of Education, and the same Weir who had co-authored the Putman-Weir Survey of 1925.

The King Report, although it was written only three years after The Kidd Report, when economic conditions were not substantially different, assigns emphases to the principles of efficiency, equality, and diversity in ways which show the two reports to be worlds apart. It is clear that The King Report emphasizes equality of opportunity over economic efficiency. He differs from the other sources examined, except The Kidd Report, in that he recommends, in the interests of equality and efficiency, the abandonment of both the school district system and the practice of having elected trustees manage local school systems.

King's study begins by slamming both central and local authorities because of blatant inequalities. He notes that

From 1888 until the immediate past the Government has been steadily disentangling itself of the burden of education and shifting it to the local communities. This has resulted in inequalities of burden and inequality of opportunity (King, 1935, p. 7).

In many respects King's study might be described as a catalogue of inequalities accompanied by suggestions for creating greater equality. King (1935) remarked that in good economic times he had seen an expansion of services in many of the wealthier districts.

Immediately, inequalities in educational opportunity are created between the youth of the communities offering these superior facilities and the youth of the rest of the province (p. 7).

On the question of high school fees, King (1935) argues that "it is obvious that such a practice would violate social justice" (p. 175). In response to the suggestion that children

of parents "who can prove their indigence be exempted" from paying fees, King (1935) states that

No Canadian should be subjected to this indignity. It is inequitable in any case, for the parents have either paid their full share of direct or indirect taxes in the past or they will do so in the future (p. 175).

In terms of economic efficiency, King's focus is shown in his asking the question: "Is education worth the price that has to be paid for it" (p. 28)? He answers this question by citing the contributions that education makes to society. He qualifies this with:

The writer does not hesitate to say that he does not think full value has hitherto been received for the money which has been expended upon education, and he states his further opinion that with the existing administrative machinery, full value can never be obtained (p. 28).

King's study is a call for greater equality and full value for money expended. He sees the school district system as the major stumbling-block to equality and economic efficiency. The King Report takes considerable space to document a vast number of proposed changes to the school district system. Only the salient points will be noted here. He advocates the abolition of the 827 school districts and the use of the 20 existing regional inspectorates as administrative units. Trustees would not be elected.

A Director would be responsible for the professional and business administration of his area. He could also be the official trustee for the area (King, 1935, p. 123).

He does note, however, that "it is desirable that local interest in schools be maintained" (p. 123). He suggests



citizen committees or Parent-Teacher Associations as possible organizations for advising the Director of Education on local issues.

To conclude, it is evident that The King Report emphasizes the principle of equality by sheer devotion of space to the purpose of cataloguing inequalities. It shows that efficiency is also important by cataloguing inefficiencies in the district system. Diversity, achieved through local control, is given a negative emphasis and is seen as the cause of the evils, inequality and inefficiency.

#### THE CAMERON REPORT (1945)

The Report of The Commission of Inquiry into Educational Finance, written by Maxwell Cameron during the last months of World War II, is probably the single most important document in the history of education in British Columbia. Cameron (1945) redrew the school district boundaries, reducing the number of districts from 650 to 74. Unlike so many research studies and proposals for change, this report, with a few modifications, became law.

The value mix in The Cameron Report clearly emphasizes the principle of equality, first and foremost. Economic efficiency is a central focus of the study and, while local control is assigned secondary importance, in relation to the notions of equality and efficiency, it is still considered to be an important principle in Cameron's value scheme.

According to Cameron (1945), equality of opportunity was seen by the citizens of British Columbia as the most important principle in the organization of the system. The people of B.C., he writes,

have made up their minds that their Government shall see to it that, as far as Nature permits, every child shall have a chance to obtain an adequate schooling, and that the cost of this schooling shall be apportioned with reasonable fairness, all relevant factors being considered (p. 36).

Cameron (1945) further states that

if this equality of opportunity and equality of burden cannot be attained unless the Provincial Government takes over the whole system, then take it over it must, for these are of paramount value.... In the eyes of the Province the child in Telegraph Creek is as much entitled to a good schooling as the child in Vancouver, and (under a centralized system) everything possible would be done to see that he got it. The great merit of centralization is the equality it can produce (p. 36).

Cameron (1945) speaks of efficiency in relation to centralization. The benefits he lists include economies in purchasing, uniform accounting procedures, and the greater availability and more careful placement of professional leaders and specialists.

Cameron (1945) addresses the issue of local control with great insight and perhaps considerable foresight as well. He speaks to the dangers of centralization.

After the first few years there would be a danger of rigidity. It is almost inevitable that many promotions would be made on the basis of seniority. Where mere length of service was not decisive (in promotions)...conformity would be placed at a premium.... The larger the organization the more important is its machinery and the less important are the human beings who run it....In the delicate, sensitive affair which is a school system, human

relationships are immensely important, and machinery must be kept to a minimum; and uniformity is almost the same as lack of progress. Especially is flexibility essential in the school system of this enormous Province, where distances are so great and conditions so varied that no central office, no matter how enlightened and well intentioned, could adjust its policies to them (p. 37).

In order to achieve greater equality in the school system Cameron recommended, in simple terms, that a basic schooling program be devised, described in financial terms and

be made as nearly as possible available everywhere in the Province by means of a grant system which will require that all property in the Province be taxed at rates which are as nearly uniform as possible (p. 38).

The criteria which Cameron used to determine the adequacy of school districts reflects clearly the value system outlined above. The greatest emphasis is placed on equality in the provision of adequate services.

If possible, the area chosen as a school district should be large enough to justify a reasonably adequate schooling from Grades I to XII. If one test is more important than the others, it is this one...(p. 86).

Further, school district boundaries should, according to Cameron's criteria for adequacy, disregard municipal boundaries. Finally, after warning that there are limits to both smallness and largeness in school districts, Cameron (1945) notes that

the unit should be understandable to the local people. It should if possible be a community, an economic entity or a trading area. This does not mean that the unit need always be small in extent (p. 86).

The emphasis given to the value of equality over efficiency or

diversity in The Cameron Report is clear enough.

We must have much more equality than we have; if we cannot have it without complete centralization, we shall have to have that too; if we can have it and still preserve local control, let us by all means do so (p. 37).

### THE CHANT REPORT (1960)

The Report of the Royal Commission on Education (1960), produced by S.N.F. Chant, chairman, and J.E. Liersch and R.P. Walrod, is a massive document not very different in either scope or structure from the Putman-Weir Survey of 1925. The Chant Report pays little attention to issues of school governance. After all, The Cameron Report had brought about tremendous structural changes only fifteen years earlier, and appeared to have given the system a reasonably workable organization. The Chant Report tends to concentrate, then, on the scope of the educational program, teacher training, curriculum, instructional methods, and administration. In terms of the emphasis on the values of equality, efficiency and diversity, it is clear that the principle of equality receives top billing. The principle of equality, which had been dealt with extensively in other reports examined, tended to be community equality in terms of the provision of services and the sharing of the burden of cost. The Chant Report in many respects assumes the existence of community equality and sharpens the focus and aims toward the equality of service provision for individuals. In fact, when one sets The Cameron Report and The Chant Report beside one another, it is evident

that Cameron (1945) suggested the 'rough cuts' for the equal provision of services and Chant (1960) suggested some of the refinements and looked after the details. Whereas Cameron spoke of school facilities, Chant spoke of science labs., gymnasias, art and music rooms. Whereas Cameron spoke of the equality of service provision for the child in Telegraph Creek and the child in Vancouver, Chant spoke of the provision of services for the special groups of children within those communities: the slow learners, the mentally retarded, the Deaf, the Blind, and Native Indians.

In a short section on school district organization, The Chant Report quotes passages from Cameron's work on the criteria of school district adequacy. Chant et al (1960) note their agreement with Cameron's criteria but point out the great differences in size among existing districts. They favour further consolidations of smaller districts and recommend that small districts be combined in the interest of economic efficiency.

The Commission considers that the consolidation of such districts would result in economies regarding administrative and some other costs (Chant et al, 1960, p. 58).

That The Chant Report values the principle of efficiency above local autonomy is patently clear. The authors note that

Local disagreements should not stand in the way of reasonable economies...(p. 58).

The Chant Report (1960) recognizes that school district boundaries should be studied and altered from time to time. It is acknowledged that the situation is not a static one "because

changes occur in population, economic conditions, transportation facilities and the like..."(p. 58).

The juxtaposition of two sentences in The Chant Report illustrates a basic dilemma with which all who examine school district organization must eventually come to terms: central versus local control.

Any changes should be based upon public understanding, because the overall success of any change will depend upon the extent to which the public knows, and is in sympathy with, its purposes and probable outcomes. The Council of Public Instruction, however, may, by order, create school districts, define their boundaries, and alter the boundaries of, or abolish, any school district (Chant et al, 1960, p. 59).

To summarize, then, The Chant Report is a document which begins where The Cameron Report finishes. The notion of equality of opportunity is refined and extensively detailed. That economic efficiency is valued over local control is evident in The Chant Report's recommendation that small districts be combined in the interest of economic efficiency

regardless of whether the local authorities like, or do not like, the idea.

#### **SUMMARY AND ANALYSIS OF REPORTS COMMISSIONED BY THE PROVINCIAL GOVERNMENT**

To summarize the foregoing analysis of value schemes in the four major reports on education commissioned by the Province or Ministry of Education between 1925 and the present,

as well as The Kidd Report, it is clear that the principle of equality has been given the greatest, most consistent emphasis, if we exclude The Kidd Report. Economic efficiency was advocated consistently but not as an end in itself, except in The Kidd Report. Rather, economic efficiency, in the collection and distribution of resources was sought with great consistency in order to pursue the prime goal: equality of burden, and equality of service provision.

The principle of diversity which subsumes the notion of local control has received differential emphasis over the years in the various proposals of those who attempted to formulate a value mix for the organization of British Columbia's school system.

Putman and Weir (1925) noted that local control in the over 700 school districts in 1925 was essentially the cause of the inequalities they saw, but they also noted that community participation and local initiative were very important to the operation of schools. They fully supported the notion of locally elected school boards, especially if some way could have been found to have greater equality. The Kidd Report (1932) advocated, not the elimination of local control, but certainly some considerable curtailment of it. The argument raised was based on the assumption that the governing body, which spends money ought also be the body which has to collect it. Kidd et al (1932) felt that municipal councils should run the schools in municipal districts and that the Provincial Government should "control" how school districts spend money in

rural districts.

The King Report (1935) seizes upon the conditions of great diversity in levels of service provision which its author observed in British Columbia and places much of the blame for this diversity on the school district system. It must be remembered that there were over 800 school districts at the time the report was written. He advocated large units for administration (20) and that officials, under the watchful eye of the Ministry of Education, be made responsible for the administration of these units. He advocated that voluntary (not elected) advisory committees be established and that the administrator consult with these groups to allow them to participate in the running of the school division.

Cameron (1945) advocated greater degrees of local autonomy than any of the reports examined. He wanted equality above all else but felt that if locally elected school boards were retained in the new larger districts they would maintain or increase community interest and participation which he saw as highly important "in the delicate and sensitive affair which is a school system" (Cameron, 1945, p. 33). The major danger Cameron noted with centralized control of the system was the possibility that the system would turn into an unwieldy bureaucracy which would be more concerned about itself, and the machinery in it, than about the importance of human beings and their interactions.

One cannot help but note that, by the time of The Chant Report (1960), it may have been that some of the warnings and



fears of Putman and Weir (1925) and Cameron (1945), with regard to the dangers of centralization, were well-founded. Putman and Weir (1925) stated that it would not be possible to maintain local control if the Province paid the bill for education in the school districts. Cameron (1945) felt that with his <sup>2</sup>System of Provincial grants, essentially based on need, the notions of central control and central financial control could indeed be kept separate. Cameron further warned of the possibility that a centralized system could encourage conformity, rigidity, sameness and inflexibility with the establishment of the machinery and concerns of a huge bureaucracy. In the light of these ideas, it is noteworthy that Chant (1960) begins his discussion of the British Columbia school system by detailing how fast it was growing out of its clothes. He advocates that since the Department of Education was involved in "the management and supervision" of these additions, then it should be "revised in order to provide the staff that is necessary for keeping abreast of the continuous expansion of the...system" (Chant, 1960, p. 51). Chant (1960) further recommended that "a building for the Department of Education be constructed to provide all branches with suitable accommodation that will allow for the inevitable expansion of the public school system" (pp. 51-2). As well, The Chant Report calls for the addition of two departments to the Ministry of Education: one for research, another for planning. Between 1945 and 1960, between The Cameron Report and The Chant Report, the Provincial Government became far more directly

involved in funding education. Perhaps as a result of this, and certainly as a result of the population boom, The Chant Report recognized what it considered to be a need of the central bureaucracy: the need to increase its size, facilities and specialized staff to manage and supervise the system's growth. The report also recommended that small districts be combined, even against the wishes of the communities in them, in the name of economic efficiency.

#### B.C.S.T.A. CASE STUDY REPORTS ON SCHOOL DISTRICT REORGANIZATION

This section examines five case studies of school district reorganization, commissioned and published by the British Columbia School Trustees Association in the early 1970's. The studies examined, in the order of their discussion are:

- 1) The Armstrong Case by Norman Robinson,
- 2) The East Kootenay Case by Franklin P. Levirs,
- 3) The Mid-Island Case: Educational Aspects, by R.B. Stibbs,
- 4) The Mid-Island Case: Finance and Community Involvement, by Peter Coleman, and
- 5) The North Shore Case, by William A. Plenderleith.

These studies will be examined in order that some determinations be made regarding how each weights the principle of diversity in relation to the principles of equality of opportunity or economic efficiency. Not all of these reports deal with value questions as far as school district reorganization is concerned, but all make recommendations to local school boards on one or more possible courses of action regarding reorganization. Clearly, those reports which do not examine and discuss values are much less useful to this analysis. It

is the view, here, that if it is the purpose of a research study to provide information to trustees on issues as important as school district reorganization, then that research ought to provide the kinds of information which could be used as a guide, as background, and as a framework for trustees in making decisions for themselves; to provide them with some of the means of decision-making, rather than one end result or a number of possible end results. Thus, it is not so much the final recommendations of the authors of the case studies with which this analysis is concerned, as it is the value spectrum from which these recommendations emerge.

#### THE ARMSTRONG CASE (ROBINSON)

Robinson's Armstrong Case, the first of the case studies to be completed, deals with the feasibility and desirability of the amalgamation of Vernon and Armstrong School Districts. The Armstrong Case provides a solid base on which to rest discussions of values in proposals or plans for school district organization. Robinson (1971) stresses at the beginning of his study the impermanence of school district boundaries.

Changing political, economic, social and educational forces operating in society give rise to a continuing need for school district reorganization. What may be an effective and an efficient school district unit today can be made into an effective and inefficient unit through a change of forces operating in society. Consequently, school district reorganization will be a continuing process as long as lay and professional groups wish to preserve the concept of strong local administrative units in education (p. 3).

Robinson (1971) specifically addresses the question of

values in school district reorganization schemes, noting that

any set of criteria for determining the adequacy of a school district is based on certain underlying values. Organizational structures are developed for the purpose of maximizing opportunities for the realization of values on which the structures are based (pp. 9-10).

Noting, then, the importance of viewing school district reorganization as a continuing process, and the importance of understanding the value base upon which organizational structures are planned, Robinson (1971) reviews Cameron's criteria of school district adequacy, discussed above, and then develops his own set of criteria, fleshing out each criterion in operational terms.

The major criteria areas that should be considered in judging the adequacy of a school district are as follows: (1) scope of the educational program; (2) provision of adequate staff, services, and facilities; (3) provision for community involvement; and (4) economic viability and efficiency (p. 12).

It appears that the first two criteria (scope of the program and the provision of adequate services) concern the provision of equal opportunity in terms of programs and services to students. The third criterion (community involvement) might be described as a provision for diversity, and the fourth criterion (economic viability and efficiency) clearly addresses the principle of economic efficiency. So, how are these criteria weighted within the value mix?

Robinson (1971) states that:

the major criterion that should be used in determining the adequacy of a school district is...the scope of the district's educational program. All other criteria are, in a sense, secondary in importance...(p. 39).

And yet, to say that the scope of the educational program is held by Robinson to be the most important criterion of adequacy, is not to say that the other criteria are not important, just less important. Certainly, the criterion of provision for community involvement is discussed at considerable length in The Armstrong Case. Robinson (1971) notes that

There is a very strong and vital need for wider involvement of citizens of all classes in community decision-making. This involvement is particularly important in education as schools are the one institution that serve the total community (p. 19).

Further, in the same vein:

In no other field is the need for social inventions guaranteeing involvement greater than in the field of education. There are mounting demands from parents, students, and teachers for more say in the educational decision-making process. Yet there have been few new mechanisms developed to provide for this desired involvement (p. 20).

The Armstrong Case discusses the principle of economic efficiency with particular emphasis on the relationship between school district size and economic efficiency. Robinson (1971) notes that, on the question of size and efficiency, "there is a strong, though not completely linear, relationship between school district size and economy of school district operation" (p. 23).

Finally, on the subject of efficiency, Robinson (1971) points out that

It has often been assumed that the quality of educational programs is directly proportionate to the amount of money spent on them. Were this true, many of the smaller districts would be providing programs of high quality. In most cases, the high per pupil

cost in the small district is partially a result of the inefficiencies of operation resulting from the handicap of smallness (p. 24).

This led Robinson to conclude that some districts were, in fact, "small but necessary."

### THE EAST KOOTENAY CASE (LEVIRS)

The East Kootenay Case, by Levirs (1971), a feasibility study of the amalgamation of Fernie, Cranbrook, Kimberley, Creston and Invermere School Districts, in many respects, is built upon the work of Robinson (1971). Levirs (1971) notes,

Dr. Norman Robinson has recently suggested new criteria which he discusses at length. There is no need to discuss them again here other than to say they are generally acceptable in educational thinking today (p. 21).

It is clear that Levirs makes use of Robinson's criteria of adequacy. This is particularly evident in his discussions of "essential elements" in "any plan for amalgamating the five school districts of the East Kootenay" (Levirs, 1971, p. 18). He addresses financial concerns first, noting that any plan for consolidation "that does not include the two central districts of Cranbrook and Kimberley is not going to realize the total possible advantages of union" (p. 18). These two regions were seen as essential because they contained the greatest concentration of students and "50% of the total assessed values" in all five districts (Levirs, 1971, p. 18).

In terms of community involvement, Levirs (1971) speaks of "consultation with those most affected--both public and staff," and notes that "there must be a willingness on the part of each

participating district to accept as 'good' and 'right' the pooling of its educational and financial resources" (p. 18). In other terms, the populations within the school districts had to generally accept the principle of equality of opportunity and burden if the amalgamation was to realize all possible advantages. In fact, Levirs (1971) states that the pooling of educational resources and financial resources would allow

all pupils in the new district (to) receive the same educational opportunities in the future and (allow) all citizens...(to) benefit equally from the resources of the wider area (p. 18).

Levirs makes it clear, then, that financial considerations and equality ("sameness") of opportunity are important concerns.

The notion of community involvement, as described by Levirs (1971), however, implies, it seems, public consultation aimed at achieving public acceptance of predetermined decisions, rather than, as Robinson (1971) suggests,

involvement (providing) a means whereby citizens help shape the direction and form of their public institutions (p. 19).

### THE MID-ISLAND CASE (STIBBS)

The Mid-Island Case: Educational Aspects, by R.B. Stibbs (1971), deals with the feasibility of the proposed amalgamation of Cowichan, Lake Cowichan, Ladysmith and Nanaimo School Districts. As the title of the study suggests, the focus is on the educational benefits of reorganization, although, in fact, it does touch on the financial support of educational services in these areas as well. The report begins with a brief

historical look at school district reorganization in B.C., using the major reports made to the Provincial Government or the Ministry of Education as sources. Stibbs (1971) notes two of the four criteria developed by Robinson (1971) in The Armstrong Case, and concludes that

a satisfactory district today must meet two main criteria: (1) the district must be able to offer an acceptable educational program to all pupils at all grade levels, (and) 2) the economy of the area should be able to provide financial support for the educational requirements of the district (p. 3).

Although "provision for community involvement and comprehension" (p. iii) is listed in the study as a "term of reference" and "general directive", provided to Stibbs by the B.C.S.T.A., community involvement is scarcely mentioned. The report concludes that any amalgamation presents difficult problems which require "wide community participation" (p. 28). The nature of this community participation is not made clear by Stibbs (1971). He acknowledges that

business, parents, and local government should be fully informed. Such a team approach will slow the process of amalgamation, but to arrive at the right decisions and action, this is necessary (p. 28).

It is, as the above passage suggests, not clear whether community participation is defined as merely being kept "fully informed" or whether the notion of "a team approach" does, in fact, mean community involvement in decision-making. Stibbs does however list four criteria (which, he notes, are listed in rank order of importance) of sound amalgamation. The involvement of the communities, although it was mentioned but not clarified, apparently does not receive consideration in



these "main points to remember," which Stibbs (1971) spells out:

- 1) The first criterion of sound amalgamation is that it be educationally desirable.
- 2) The second criterion is that it must be economic.
- 3) The third criterion is that it consist of a practical geographic unit.
- 4) The fourth criterion is that the amenities of the region be taken into consideration--its cultural facilities, shopping outlets, recreational facilities and adult education programs (p. 28).

The report emphasizes educational service values and suggests that the amalgamation of the four districts under study would relieve the great disparities between them in terms of service provision. Thus, it is fairly safe to conclude that this study places the greatest emphasis on the principle of equality of opportunity. Economic efficiency receives secondary emphasis. Diversity, arising from local control and community participation in decision-making, was mentioned briefly, but appears to have been scarcely considered by Stibbs.

#### THE MID-ISLAND CASE (COLEMAN)

Coleman's Mid-Island Case: Finance and Community Involvement (1971), examines the organization of Cowichan, Lake Cowichan, Ladysmith, and Nanaimo School Districts. Coleman's study begins with a very detailed discussion of "the underlying values which give rise to organizational structures" (p. 6).

The principle of equality of opportunity, "the most fun-

fundamental and lasting basic value in education in North America" (p. 6), is discussed at length in terms of a continuing tension between society and community. The essential difference between the community and society perspectives is in the differing expectations each has for education.

The community views education as a socialization process which prepares the young person to take his place in the existing community and occupy in it approximately the position of his parents.... The society, on the other hand, has expectations for the young which are far more global and open. The education system...has the primary purpose of providing useful skills and knowledge with which the young person can enter the open and competitive social system. The expectation is that the most successful graduates...will achieve high status and relative prosperity...(and) pursue a career with the accompanying expectations of substantial geographic movement. The university is seen as the logical stepping stone to this movement (Coleman, 1971, p. 8).

The education system must adapt to the expectations of its clients; expectations which run the gamut from the extreme society view to the extreme community view. In terms of school district size, Coleman (1971) suggests that if the society view is taken, with its great emphasis on providing a broad range of programs, then the simple rule is "the larger the better" (p. 9). On the other hand, the community view is probably best served by smaller districts.

Since national or provincial governments are responsive to pressures from a wider range of people, they have tended to become the proponents of equality of educational opportunity (p. 9).

As well, the Provincial Government, in responding to pressures from a wider range of people, has placed great emphasis on the society perspective and has, over the years, tended to use

every opportunity to make school districts larger. As Coleman (1971) notes,

the society view...has won a long series of victories, and has dominated school district reorganizations completely. This does not of course necessarily demonstrate the superiority of the society view of educational organization. It merely suggests that this view has been more popular in recent years (p. 20).

In terms of their responsiveness and their ability to adapt to the needs of their clients, Coleman (1971) holds that,

as schools become more and more responsive to the society view, as determined by professional educators, they seem to become less and less responsive to the needs of their clients, and particularly parents (p. 13).

Coleman (1971) posits that the general level of effectiveness of the schools is highly susceptible to influence from the interactions, attitudes and values of the many constituent groups which comprise a school community. He concludes that

it is inappropriate at this stage in our knowledge of education to attempt to make decisions about educational systems which do not pay a good deal of attention to the element of consumer values or the involvement of the community in the schools (p. 24).

It is clear then, that, as reported by Coleman, the enduring emphasis on the principle of equality of opportunity, over the values of efficiency and particularly diversity, in the history of school district reorganization schemes has derived, in large measure, from the perspective of the Provincial Government responding to pressures from a wide range of people. In British Columbia, over the years, the society perspective has won a long series of victories in that school

districts have been made larger and fewer in number.

### THE NORTH SHORE CASE (PLENDERLEITH)

Plenderleith's North Shore Case (1971) examines the school districts of North and West Vancouver to determine the feasibility of merging the two. The North Shore Case develops a set of criteria for school district adequacy, acknowledging and making use of the criteria laid out by Robinson (1971) in The Armstrong Case, but, whereas the criteria developed by Robinson might be used in judging the adequacy of any school district, Plenderleith's criteria consist of guidelines for judging the adequacy of "a modern, medium-sized urban school district" (p. 8).

It is difficult to assess the value mix in Plenderleith's criteria because the thought processes and value questions which led to the formulation of these criteria are not discussed in The North Shore Case.

The specific criteria devised by Plenderleith cover a wide range of services and facilities for students, and are detailed to the extent that they describe optimal school sizes and class sizes for various grade levels. The general criteria, however, provide us with some partial insights into the value scheme underlying Plenderleith's criteria. The principles of equality, efficiency and diversity are represented in these general criteria.

1. The school district unit should be understandable to the people who are living in it.

2. The school district unit should have a minimum of 20,000 students to provide adequate educational offerings from Kindergarten to the Community College level.
3. The school district unit should have sufficient taxable values to be able to support a reasonable enrichment of the basic educational program.
4. The school district unit should have built-in channels of communication between the public and their representatives so that the school system can be constantly evaluated and adjusted to meet the needs and requirements of the people, and so that the people can have the opportunity to become actively involved in the affairs of the school district (Plenderleith, 1971, pp. 8-9).

While the specific criteria listed by Plenderleith, under nine subheadings, deal with the principle of equality of service provision, these general criteria quoted above indicate a considerable degree of attention to the principle of diversity. The principle of economic efficiency is merely touched upon with mention of the "minimum size" for a school district to provide adequate educational offerings at the lowest cost.

The principle of diversity is given some considerable degree of attention in the general criteria devised by Plenderleith. The first and fourth criteria; that a school district should be understandable to the people living in it, and that communication and adaptation be built into the system, are important reasons for the continued existence of local control and the school district system. But, further to this, the significance of the principle of diversity in Plenderleith's (1971) scheme is evident in the third criterion: that school districts have access to sufficient

local funds to allow for the "reasonable enrichment" of the basic program financed by the Provincial Government (p. 8).

In concluding his case study, Plenderleith (1971) notes that the chief objective of any educational system is

the establishment of the most efficient method of providing maximum educational opportunities for the pupils concerned (p. 133).

While efficiency is touched on here, it should be pointed out that the notion of equal educational opportunity, the concept given such extensive treatment in most of the sources examined in this review, is not mentioned. Rather, Plenderleith uses the phrase "maximum educational opportunities". Further, these maximum opportunities are linked to "the pupils concerned." The inference which might be tentatively drawn here is that the provision of maximum opportunities may mean the provision of different opportunities for students in different communities.

#### SUMMARY AND ANALYSIS OF B.C.S.T.A. CASE STUDY REPORTS

Five case studies were examined in order to determine how each dealt with questions concerning values.

Robinson (1971) holds that the first value priority in a value "mix" should be equality of opportunity insofar as the scope of the educational program is concerned. Robinson also calls for wider citizen involvement in educational decision-making and emphasizes that new avenues ought be developed to encourage citizens to participate in local school affairs. He acknowledges that some small districts are perhaps less efficient than some larger ones, but advocates that the

Province make allowances in its grant formulae for some of these "small but necessary" units.

Although Levirs (1971) claims to agree with the balance of the three values outlined by Robinson (1971), it seems that he emphasizes the value, efficiency, to a greater degree than Robinson. Levirs (1971) is primarily concerned with recommending new school district boundaries which would maximize the economic efficiency of the schools in the region. He notes that combining resources through amalgamation would improve and tend to equalize educational opportunity. Levirs (1971) does not speak about community involvement in the decision-making process as Robinson had done. It is thus apparent that Levirs probably valued the principle, diversity, least of the three values.

Stibbs (1971), like Levirs (1971), was concerned primarily with altering boundaries to increase resources, to provide increased services and a more equal distribution of services. Also, like Levirs, Stibbs speaks of informing the school community of decisions made by policy-makers, rather than the involvement of the school community in the decision-making process as Robinson (1971) had called for.

Coleman (1971) touches upon economic issues in his report but emphasizes the tensions which exist in community and society perspectives on the goals of education, noting the predominance of the society perspective resulting from a long-standing desire to achieve greater equality. As well, Coleman linked the society perspective and the pursuit of

equality to the continued trend toward the establishment of larger and larger districts. Coleman (1971), like Robinson (1971), and unlike Levirs (1971) and Stibbs (1971), advocates that greater attention be paid to involving citizens in the affairs of their local school district.

Plenderleith's (1971) value scheme is implied and not explained in The North Shore Case. If his recommendations provide clues to his value scheme, however, it seems that the value, diversity, receives considerable emphasis, although issues connected with the values, equality and efficiency, are noted. Plenderleith seems to touch on one point which is not mentioned in the other four studies. He notes that school districts should be concerned with providing different educational opportunities to meet the various needs of the citizens in the communities they serve.

## DISCUSSION

The introductory chapter to this study pointed out that an enduring assumption of researchers and policy-makers, with regard to value questions in school district reorganization proposals and policies, is that the three values--equality, efficiency and diversity, the major organizing values in the design and structure of school systems--are necessarily competing values. Evidence of this assumption seems to exist in the major commissioned reports on the school system of British Columbia between 1925 and the present. Further evidence of this assumption appears to be present in five



reports on school district reorganization commissioned and published by the British Columbia School Trustees Association in the early 1970's.

The picture which emerges in this chapter indicates that the various authors of reports on the school system and/or school district reorganization in B.C. generally noted the importance of all three values--equality, efficiency and diversity--but frequently argued that one or two of the values should receive more attention or emphasis than one or two of the others. The general assumption in most of these reports is that since it is not possible to construct policies which maximize or seek to develop all three values simultaneously, then certain of the values must be sacrificed in a sense, to greater and lesser degrees, in order to enhance others.

CHAPTER THREE: EQUALITY

In the eyes of the Province the child in Telegraph Creek is as much entitled to a good schooling as the child in Vancouver, and everything possible would be done to see that he got it.

--Maxwell A. Cameron  
Report Of The Commission Of  
Inquiry Into Educational Finance  
p. 36

Schooling is an important commodity and the returns to investments in schooling benefit both individuals and society. Individuals are seen to benefit from education in economic and social terms. Increased levels of educational attainment have long been associated with higher incomes and social status. The whole of society is said to benefit because the increased educational and skill levels of workers has been linked to increases in the productivity of the labour force. Indeed, as Porter (1979) points out, "a good proportion of the economic growth of industrial societies has been attributed to educational levels" (p. 251).

That education was long thought to be of great benefit to individuals is clearly evident in Putman and Weir's Survey Of The School System (1925) of British Columbia. Putman and Weir held that "free education means the open door to educational and social preferment," and stressed that most British Columbians were of the opinion that "a 'square deal' in adult life is not worth much unless there is a 'fair chance'

during childhood" (p. 302). While Putman and Weir stressed the importance of equality of educational opportunity because of the great benefits education was seen to offer individuals, Cameron (1945) stressed the benefits for society as a whole. Cameron advocated that because society would ultimately benefit from efforts to equalize educational opportunity, the cost burden should be apportioned with reasonable fairness and that, because education was a provincial responsibility, the Province should see that educational funding was equalized among districts.

Whether the pursuit of equality of educational opportunity arose from political values or from economic considerations remains a moot point. Lawton (1979) argues that the enduring emphasis given to the pursuit of equality of educational opportunity in Canada arises out of the deeply-rooted values of the Canadian political system. James S. Coleman (1970), on the other hand, makes the case that Americans were motivated to adopt the concept of equality of opportunity and push for publicly-funded schools by economic considerations. Coleman (1970) concluded that

when one [person's] children began to be potential assets or liabilities for other [persons], then interest in public education developed and led to the establishment of public schools (p. 66).

Peter Coleman (1972) notes, in his study of equality of opportunity in Manitoba, that

the issue of educational opportunity becomes a very serious one for educators and for educational systems when education becomes a determinant of one kind of success in life after schooling. Clearly, if success

in the school context was not related to any subsequent achievement it would still be important to provide some measure of equality of opportunity in education, but it would not be a vital issue of importance to the entire society (p. 2).

This chapter examines three basic interpretations of the term "equality of opportunity" looks at areas of conflict which have been seen to exist historically between the values, equality and diversity, and examines five basic financial systems which have been, and continue to be, used to distribute funds from central to local governments to equalize per-pupil expenditures among school districts. Possible problems with each financial distribution system are discussed from a policy perspective. Subsequent sections of this chapter chronicle apparent changes in the societal mood which, it will be suggested, reflect changing perspectives on the ability of school systems to achieve their longstanding goal: equality of opportunity. It is suggested that while many school systems may have achieved a greater measure of equality of opportunity, (over the last four decades), in terms of equality of service provision, these achievements have not substantially altered an unequal social structure. The final section of this chapter explores the thesis that school districts will pursue quality and hence equality goals to the extent that internal and external structures provide the incentives and controls which allow and encourage them to do so.

#### DEFINITIONS OF EQUALITY

As the introductory chapter to this paper suggests,

perhaps one of the most important contributions of the current research on equality in education lies in the realm of definition. It is important that policy-makers, practitioners, researchers and other members of the school community understand what they mean, hence what they want to achieve, as they advocate the value, equality, in proposals and policies for the organization and/or reorganization of school district systems.

Seeley (1981), Alexander (1982), Garms, Guthrie and Pierce (1978), Madaus, Airasian and Kellaghan (1980), and Burbules, Lord and Sherman (1982) have determined that there are basically three interpretations of equality which have emerged in discussions of equal educational opportunity: equality of access, equality of treatment and equality of outcome. In fact, it may be that the concepts of "equality of treatment" and "equality of outcome", strictly speaking, ought not be labelled "definitions of equality of opportunity". Coleman (1972) argues that "equality of access" constitutes one level of equality of opportunity, whereas the notions of "equality of treatment" and "equality of outcome" actually seek "to provide educational opportunities unequally" in the sense that they call for planned inequality (p. 62).

Equality of access, without question, has been the longest-lived and most widespread interpretation of "equality of opportunity". As Garms, Guthrie and Pierce (1978) note,

equal access assumes that providing students with at least a minimum level of school resources suffices to ensure equality of educational opportunity (p. 22).

Historically, this definition implied, in many cases, that as long as schools of some description were provided to all communities in a given jurisdiction, then equality of opportunity would exist for all students. Subsequent to the development of this definition, concerns about the differential quality of schools within districts, regions, states or provinces caused the definition to evolve to mean more than simple access. Equal access came to mean that every community in a jurisdiction should be entitled to the same, minimally adequate levels of school services. In a study of equality of opportunity in Manitoba, Coleman (1972) advocated this definition of equality (equality of access), noting that

simple equality is obtained when every child (no matter where he or she lives) has an equal chance to obtain the services of highly qualified teachers, suitable programs and adequate facilities (p. 4).

The definition of equality of opportunity which has been called "equality of treatment" by Garms, Guthrie and Pierce (1978) acknowledges that students have widely-varying abilities, handicaps and talents. Therefore, educational services should be highly tailored to each student's specific circumstances. It follows then that supplying the same level of services to all students, as suggested by the interpretation, "equality of access", discussed above, is insufficient because "what is adequate for some children does not put less fortunate children at the 'starting line' in the race for life's rewards" (Garms, Guthrie and Pierce, 1978, p. 23). Thus, the notion of equality of treatment might best be defined from a policy perspective as the supply of different

types and levels of services to students in recognition of the fact that students have vastly different abilities.

The third interpretation of equality of opportunity calls for the equalization of educational outcomes. This interpretation "stemmed from the observation that academic achievement had become crucial for personal success" (Garms, Guthrie and Pierce, 1978, p. 24). Thus, those who subscribe to this interpretation call for policies which set minimum standards of competence, usually measured by one or a number of standardized tests, and which do not necessarily specify the levels and types of resources required to achieve those competencies. This interpretation implies, then, that regardless of the varying abilities of students when they enter the system, the schools should apply whatever resources might be required to make those students as close to equal in their abilities as is possible when they leave.

The problem for policy-makers, assuming that some consensus can be reached about which definition or definitions of equality of opportunity should be pursued, is to translate the appropriate principles, values and goals into policies which will help achieve them. Educational research has pointed out numerous problems and issues connected with the development of policies designed to achieve the goals outlined by each one of the three definitions or interpretations of equality of opportunity explained above. Some of the more salient issues will be noted below.

The major problems facing policy-makers who attempt to

achieve equality of opportunity by equalizing access--through the supply of identical levels and types of services to all communities within a jurisdiction--have been well documented, since historically this approach to the achievement of equality has dominated all others. This approach to equality is clearly the least difficult of the three in terms of measurement. To the extent that central governments can devise funding formulae which allow local governments to supply the same services in all districts in a jurisdiction, equality of access will exist in some measure. The problem, however, is that this method of measuring educational opportunity "rests on two highly questionable assumptions," according to Dyer (1972).

The first assumption is that there is a one-to-one relationship between the cost of what goes in to the running of a school and the quality of the goods and services bought for the purpose. The second is that the quality of the goods and services, thus measured, bears a similar relationship to the effectiveness of the school in meeting the developmental needs of the children (p. 513).

Seeley (1981) has summed up this problem succinctly, noting that "while one cannot condone giving worse or fewer services to some than to others, equal service inputs are not guarantees of equality" (p. 111).

Similar, and additional problems exist for policy-makers who might attempt to achieve equality through policies designed to place in practice the interpretation of equality which has been outlined above as "equality of treatment". An important distinction between the notions of "equality of access" and



"equality of treatment" must be noted. While "equality of access" would seek to provide the same levels of services to all communities in a jurisdiction, or to all school districts in a school district system, "equality of treatment" would seek to provide different levels of services to individual students based on the degrees of advantage or disadvantage of those students within a school district or a school. It is this focus on the individual, rather than the community, which introduces overwhelming elements of complexity for provincial or state policy-makers who must attempt to measure the effects of policies designed to achieve the objectives of equality of treatment. This interpretation, however, is frequently reflected in central government policies to apply differential funding levels for such groups as the physically and mentally handicapped and the gifted. However, the success or failure of such policies often depends upon the decisions, understanding and initiative of school boards, district administrators, school administrators, teachers, students, parents and taxpayers far removed from the seat of the central government.

Studies and policy proposals which argue for the equalization of educational outcomes have received much discussion and criticism in educational research. Nwabuogu (1984) suggests at least three questions which require answers before policy-makers can begin to consider proposals that would seek to equalize outcomes:

1. What are the outcomes we wish to achieve?
2. How will we measure these outcomes? and
3. Does equality of outcomes mean minimum outcomes or maximum outcomes? (pp. 79-80).

Nwabuogu argues that until and if educators can determine reasonably defensible answers to these questions, the prospects for developing policies to achieve equality of outcome goals appear to be quite limited. However, the effective schools research may provide a convenient starting point in terms of supplying educators and policy-makers with at least partial answers to some of these questions. This line of argument is pursued further in the discussion section at the end of this chapter.

### EQUALITY AND THE LOCUS OF CONTROL

The value, diversity, which subsumes the concept of local control, has long been seen to conflict with the value, equality. In fact, as the first two chapters of this paper suggest, many studies assume that local autonomy and the pursuit of equality of opportunity are incompatible in the sense that when greater levels of local autonomy exist in a system, then lesser levels of equality will be present; and where lesser levels of autonomy exist, greater levels of equality will be present. This section will argue that local autonomy and equality are not necessarily incompatible values and that they may be complementary or mutually-sustaining values, depending upon the nature of the financial distribution policies of a central government.

In British Columbia the notion that local control and equality represent conflicting values first surfaced in two major reports: the Putman-Weir Survey (1925) and the King Report (1935). Putman and Weir argued that if the provincial government financed school districts in the interest of achieving equality of access goals, local administrative and academic control would be lost to the central government as a matter of course. King noted that between 1888 and 1935, the policies of the government had shifted the burden of education from provincial to local authorities. The result: "inequalities of burden and inequality of opportunity" (p. 7). In short, Putman and Weir (1925) and King (1935) imply that there are causal connections between local control and inequality and centralized control and equality.

The conflict, however, between local autonomy and the pursuit of equality may have been significantly overemphasized. Coons, Clune and Sugarman (1970), for example, claim that they

are convinced that this supposed antithesis between equality and subsidiarity is overdrawn: that both values can be preserved if only one is willing to struggle with the complexities and fine tuning required of any balanced system (p. xxii).

Clearly, both central and local governments have a role to play if equality of opportunity; through the achievement of equality of access or service provision, is to be realized among school districts. However, by virtue of the Constitution of Canada, local school districts are, legally speaking, creatures of provincial governments; provincial governments can create or alter them at will. Thus, it seems logical to

argue that if central governments create school districts which are inherently unequal in terms of their abilities to provide services, then central governments are responsible for implementing policies which will correct or minimize such inequalities. In the past, provincial initiatives designed to correct inequalities in the abilities of school districts to provide adequate services have been of two major types: school district reorganization policies and financial distribution policies. School district reorganization policies typically sought to consolidate districts to increase the potential for achieving economies of scale (Cameron, 1945) and/or to consolidate property-rich and property-poor districts to distribute wealth more evenly over a region (Levirs, 1971). Financial distribution policies, or funding formulae, generally speaking, are designed to allow central governments to distribute funds to districts with the goal of reducing and/or possibly removing inequalities among school districts in terms of levels of service provision and/or levels of expenditure and/or their abilities to fund educational services. Of the basic financial distribution systems (examined in the next section) some are clearly more compatible with greater degrees of local control than others. Thus, one of the key factors which seems to determine the degree of conflict or compatibility between the values, equality and diversity, in the organization of school systems is the nature of the financial distribution system used by a central government. This line of argument will be pursued in greater detail in the

discussion section at the end of this chapter.

### EQUALITY AND FINANCIAL DISTRIBUTION SYSTEMS

Educational finance theories have long been linked to the pursuit of equality because of the enduring belief that quality and hence equality can be purchased and that levels of service provision have a profound effect on learning outcomes (Alexander, 1982). The purpose of this section is to examine three basic theories, encompassing five basic methods, of resource distribution for education systems:

- ✓ 1. flat grants and foundation programs;
2. percentage equalizing and power equalizing programs; and
3. full central government funding.

It should be noted that the five basic methods which will be discussed subsequently are examined at a theoretical level, and that all such methods can and have been altered using weighting formulae, cash grant supplements for special programs and a host of other "add-on's." As Alexander (1982) has observed of the various programs employed by the state governments in the U.S., many jurisdictions often use combinations of types of funding formulae: "hybrids," which contain features of several basic forms. However, the five forms are presented here as if they were quite pure and distinct, with unalterable characteristics.

As each theory or method is discussed, the same pattern of presentation will be followed: First, the philosophical

basis for each will be given, followed by the methods of distribution, and finally, issues and problems associated with each method related to the theme of equality of opportunity will be discussed.

The philosophical basis of a flat grant system of resource distribution assumes that each citizen in a jurisdiction should be guaranteed a specified minimum level of schooling, and that the central government can determine of what this minimum level should consist. It is also assumed that services beyond this minimum will be purchased by funds raised within local school districts. In practice, a flat grant program distributes funds from central to local governments on the basis of a specified number of dollars per student enrolled in the district. Although Garms, Guthrie and Pierce (1978) have determined that there is nothing inherently unequal about a flat grant system insofar as funds are "provided to all students equally and...raised by taxes levied at a uniform rate" (p. 189), others have noted problems with flat grant formulae which could produce significant inequalities in practice. Benson (1978) suggested that equality of opportunity

implies that any two children of the same abilities shall receive equivalent forms of assistance in developing those abilities, wherever they live in a given state and whatever their parental circumstances are (p. 62).

According to Benson's criteria, flat grant formulae, theoretically speaking, would fail to take into account geographical factors which may influence, say, transportation costs and/or other energy costs. As well, flat grant formulae

do not make allowances, at least in theory, for atypical students.

Foundation programs, according to Garms, Guthrie and Pierce (1978), derive from the same philosophical principles as flat grant formulae. Usually, where jurisdictions employ foundation programs, the central government specifies a minimum dollar-per-pupil figure which school districts are to receive. The districts raise what monies they can through taxes on property and, if the amount the district raises falls short of the minimum figure established by the central government, then the central government subsidizes the district up to the specified minimum level. Typically, jurisdictions which distribute funds for education using foundation programs contain school districts with differential per-pupil spending levels because, while property-poor districts, unable to raise the minimum number of dollars per student locally, are subsidized up to the minimum level, property-rich districts are able to raise amounts equal to, or in excess of, this minimum. Simply put, unless the central government takes away the amounts collected by property rich districts, in excess of the minimum, then those districts have more dollars to spend on education than property-poor districts.

Percentage equalizing formulae are based on the notion that equality will be achieved as long as all students in a district have access to educational services on the same terms. Those "same terms" include the provision--the same for all districts--that each district should determine the amount it wants

to spend on education within the district. The central government, however, acknowledges that it has an interest in seeing that all students receive some minimum level of services and so provides a fixed percentage of each district's budget according to an "aid ratio" calculated on the basis of whether a district is property-rich or property-poor. The remaining expenditures in a district, those not covered by the contributions of the central government, must be derived from taxes levied on property within the district.

Benson (1978) notes, of the percentage equalizing grant, that it may be said to have equalizing effects "since the share (contributed by the central government) is larger in poor districts than in rich" (p. 299). Garms, Guthrie and Pierce (1978), however, find fault with the percentage equalizing grant systems on the grounds that inequalities arise out of the design of the system insofar as it guarantees that the central government will share in any school district budget, no matter how large.

Power equalizing is a wealth equalizing concept which, like percentage equalizing, is not concerned with the achievement of equal per-pupil expenditures but with equalizing the abilities of school districts to pay for the schools they operate. Inherent in the power equalizing concept is the view that local communities, and not central governments, should decide how much they want to spend on education. Under a power equalizing plan, the central government, recognizing that it has some contributions to make to education, guarantees a



certain number of dollars per pupil per mill levied. Alexander (1982) concluded that these guarantees, in theory, are based on the notion that the actual level of educational support should not be related to a district's wealth and that "a unit of effort must produce the same support everywhere" (p. 208).

Full central government funding of education systems is built upon the philosophy that education is ultimately the responsibility of the central government and that services must be distributed to students on an equal basis. Generally speaking, when a central government takes over the finance of educational services in all school districts, no geographical variations in school expenditures are permitted although many such systems make adjustments for differing educational needs.

When a central government funds the school districts in its jurisdiction it also collects all property taxes on land within its boundaries, and no local taxation is permitted. The central government distributes funds on the basis of specified dollar amounts per student. Garms, Guthrie and Pierce (1978) conclude that full central government funding of school districts appears to solve some of the problems which may be associated with other formulae, but that "such a high degree of equity has a price," and that price is increased central control (p. 201).

Arguments on this issue go two ways. Garms, Guthrie and Pierce (1978) and Berke (1980) argue on the one hand that

full (central government) funding does not necessarily imply (central government) operation of

the schools, but merely (a central government) guarantee of equal amounts of money per pupil to each district (p. 200).

On the other hand, McLaughlin and Catterall (1984) note that since state governments in the U.S. have become increasingly involved in financing school systems, these governments exhibit a tendency to argue that

if the state (is) paying more to support the schools, it ought to have more to say about how they are run (p. 376).

In chapter four, the case is argued that since 1983 in British Columbia, when the provincial government introduced a full central government funding scheme for school districts using a program budgeting system, the government effectively centralized much of the decision- and policy-making authority which had previously rested with local school districts.

Other analyses of funding formulae have concluded that in systems where full central government funding of education exists without special and adequate weighting factors that take into account different methods of production in small and/or isolated districts, inequalities may, in fact, emerge in the dollar amounts expended on services for students. Fox (1981) addresses this issue from a theoretical perspective, and Coleman and LaRocque (1984), discuss this issue in their study of economies of scale in the operation of school districts in British Columbia. Fox (1981) noted, as did Coleman and LaRoque, that smaller, and less densely populated districts

may have more capital in the form of smaller and more numerous buildings, a factor which can be substituted for transporting students greater distances (p. 283).

Thus, weighting factors must be added to full central government funding packages so that students are not "penalized" for living in small, sparsely-populated school districts. Coleman and LaRocque (1984), in their study of school district costs in British Columbia, where, as of 1983; school districts receive 100 per cent. of their budget allocations from the provincial treasury, note that the funding formula

contains a "dispersion index" which yields an additional grant of 2% of most costs for students in schools more than 30 kilometres from the board office (p. 15).

Coleman and LaRocque (1984) conclude that

since...gross operating costs per pupil in small districts are 123% of provincial means and in small schools can reach 196% of district means, the additional grant is correct in principle but inadequate in practice (p. 15).

### **HOPE, UNCERTAINTY AND DISILLUSIONMENT: THE PURSUIT OF EQUALITY**

In twentieth century North America the pursuit of equality, represented by the search for equality of educational opportunity, can be linked to changes in social attitudes or moods, beginning with hope, moving to uncertainty, and finally to disillusionment, and perhaps despair and pessimism. The purpose of this section is to briefly outline some of the key works which may have responded to, accompanied, and/or influenced these apparent transformations in social mood.

The period between the end of World War II and the second half of the 1960's, roughly speaking, might be described as a golden age of hope in regard to the search for equality

through the pursuit of the principles of equality of educational opportunity. During this period both the public and educators seemed to believe very strongly that education was a great "equalizer" or "leveler" of people. Three elements of the conventional wisdom which emerged in this era of hope, concerning the relationship between education and equality, stand out. It seems that many believed that equality could be achieved if equal amounts of money were spent on all students. As Porter (1979) points out, most people thought that if expenditures were equalized then "the average level of skills among schools would become equal, that is variations between schools would disappear" (p. 253). It also appears to be the case, during this period of hope and expansion, that people were convinced that

the more resources the higher quality schooling that could be expected. Such things as smaller classes, better-educated teachers, better school libraries and equipment, better school physical plant and so on were all thought to be central to producing better-educated children (Porter, 1979, p. 253).

The era of uncertainty, which followed the age of hope, was to see all aspects of this conventional wisdom questioned.

The publication of the Equality of Educational Opportunity Survey, conducted by Coleman et al. in 1966, might be said to mark the beginning of an age of uncertainty. In short, Coleman's survey "denied the efficacy of schooling as a powerful equalizer in American society" (Madaus, Airasian and Kellaghan, 1980, p. 28). Further, it called into question the conventional wisdom about the relationship between resources and achievement (measured by standardized tests). Coleman's

(1966) report noted that

schools bring little influence to bear on a child's achievement that is independent of his background and general social context;...this very lack of an independent effect means that the inequalities imposed on children by their home, neighbourhood and peer environment are carried along to become the inequalities with which they confront adult life at the end of school. Equality of educational opportunity must imply a strong effect for schools that is independent of the child's immediate social environment, and that strong independent effect is not present in American schools (p. 325).

Although a wave of controversy surrounded the release of the Coleman survey, and arguments went back and forth about perceived flaws in the methodology, analysis and findings, it would appear that the public heard only that students leave schools as "unequal" as they enter them, and that most of the "stuff" of education that can be bought makes little difference to achievement..

If the Coleman study, and particularly the elements of it that filtered out into the public realm, caused cracks to appear in the conventional wisdom generated in an age of hope, then the study of Jencks et al. (1972) may have caused this conventional wisdom to crumble and break down entirely. Inequality: A Reassessment Of The Effect Of Family And Schooling In America, by Jencks et al., can be viewed as a key study, marking the beginning of an era of disillusionment. According to Madaus, Airasian and Kellaghan (1980) the Jencks study tested, and found erroneous, three long-standing assumptions, left-overs from the conventional wisdom of an age of hope.

The first assumption was that eliminating poverty

was primarily a problem of helping children born into poverty rise out of it; once families escaped from poverty, they would not regress back into it. The second assumption was that the principal reason poor children cannot escape the shackles of poverty is because they lack basic cognitive skills such as reading, writing and calculating. The final assumption was that education was the best avenue for overcoming poverty (Madaus, Airasian and Kellaghan, 1980, p. 43).

### EQUALITY OF CONDITION VS. EQUALITY OF OPPORTUNITY

This section explores the thesis that using hindsight, informed by the work of Coleman (1966), Jencks (1972), Porter (1979) and others, it may have been more appropriate to have called the "era of hope," the "era of false hope." And to condemn schools for not having attained what they may never have been able to attain in the first place, may be a false condemnation. It may be, as Claydon (1976) notes, that during the age of hope, schools were, in effect, given the task of remaking society, a job which they seemed willing to promise to be able to achieve.

It may have been that many of the hopes society and educators pinned on schools reflected a desire to achieve equality of condition rather than equality of opportunity. Equality of condition implies that whatever is valued in society--material goods, health, "personal development, etcetera--should be distributed to all members of the society in similar amounts, regardless of social position. Equality of opportunity implies that, given a society in which structured inequality exists, all should have access to this unequal structure and its unequal rewards, regardless of class,

sex, parental resources, religious or minority group affiliations (Porter, 1979, p. 244).

In response to Jencks' findings that public education has done little to correct inequalities in social class structures or income levels, Porter (1979) argues that these are equality of condition issues and that schools alone should not have been expected to correct such inequalities.

Similarly, Porter (1979) concludes that schooling cannot correct the vast differences in income levels between the various groups in society. These inequities which have grown, in some measure, out of structures which sanction controlled entrance to trades and professions are not going to be corrected in the schools. As Porter (1979) notes, "no amount of educational reform can overcome these entrenched privileges" (p. 253).

Thus, while educational policy-makers may be concerned with finding better ways to achieve greater equality of opportunity in education, it may be the task of other branches of government and/or the society as a whole to seek new ways to foster greater equality of condition.

### SUMMARY

This chapter has pointed out that the hopes and perceptions of individuals and of society with regard to how, or to what degree, education can achieve equality stem from a number of different definitions of equality of educational opportunity. Hence the first section of this chapter outlined

three broad definitions or interpretations of the term and examined issues and problems in policies designed to translate these definitions into prescriptions for practice. The second section examined areas of conflict which have been seen to exist historically between the values, equality and diversity. Five basic systems of wealth distribution were outlined in the third section. Educational finance theories have been traditionally linked to the pursuit of equality of opportunity because of the enduring belief that the most important aspects of schooling which influence achievement can be purchased. Possible inequities produced by each financial distribution system, if employed in a pure form, are noted. It was pointed out that full central government funding, the system employed in British Columbia since 1983, may provide the greatest measure of equality in terms of service provision, but has also led to greater central government control of school district decision-making. Some of the problems and issues connected with increased central control are explored in detail in chapter five. The fourth section of this chapter noted possible relationships between the findings of educational research, which filtered out into the public domain, and changes in public perceptions with regard to the role of education in the pursuit of equality. Guided by Jencks (1972) and Porter (1979), the fourth section of this chapter explained the basic distinction between equality of opportunity and equality of condition. It suggested that, while educational policy-makers should properly be concerned with equality of



educational opportunity, educational policies, reforms and systems alone will do little to alter inequalities in the condition or structure of society. If it is a major goal of Canadians to attempt to alter the basic structure of society, then the initiatives to accomplish such goals should come from society as a whole, and all government departments (including those concerned with education) have a major role to play in devising policies to achieve such changes.

### DISCUSSION:

This section will explore the thesis that school districts will pursue quality (effectiveness) goals, and hence equality goals, to the extent that internal and external structures provide the incentives and controls which allow and encourage them to do so. Additionally, this section draws upon the literature on school finance and school effectiveness to explore linkages between the concept of equality of opportunity and (1) efficiency and (2) diversity, or local control.

As was pointed out earlier, education finance theories have traditionally been linked to the pursuit of equality of opportunity because of the enduring assumption that the most important aspects of schooling could be purchased and that more resources would produce more achievement. Frequently, quantitative research which focused on school resources

treated all resources as parallel: moreover, it reflected the assumption that resource configurations could be manipulated and "packaged" by officials (Murnane, 1981, p. 31).

These assumptions are questionable because, as Murnane (1981) points out, "there is no unequivocal concensus regarding the role of any school resource in contributing to student achievement" (p. 21). Coleman (1985) notes that district-level studies that focus on resources as predictors of achievement generally found weak or unreliable effects (p. 14). Bidwell and Kasarda (1975) in a study of school district organization and student achievement, concluded that

fiscal resources had significant total effects on output (both reading and mathematics achievement), even though their direct effects were very small (p. 69).

Bidwell and Kasarda (1975), however, argue that

this conclusion reflects a failure to examine dependencies among environmental and organizational properties of school districts and the consequences for student achievement of these dependencies (p. 69.)

Coleman (1985) found a "consistently strong relationship between relatively high achievement and relatively low costs in school districts in British Columbia" between 1981 and 1984 (p. 13). Coleman argues that the concept of district ethos or climate "may be a sufficiently powerful force to account for (this) unexpected and strong negative relationship" (p. 34). Coleman defines "district ethos" as a district's characteristic configuration of norms and practices.

This approach, which emphasizes the importance of examining process elements, fits with what Murnane (1981) refers to as "the new research agenda" on school effectiveness, an agenda which

focuses on the responses of human resources to incentives provided by institutional rules and to the opportunities and constraints provided by secondary resources (p. 31).

Secondary resources, which include physical facilities, class size, curricula and instructional strategies can be seen, according to Murnane (1981), as "resources that affect student learning through their influence on the behaviour of teachers and students" (p. 27).

The studies examined above, which utilize or stress the importance of process approaches, suggest that the behaviour of key actors at the school level (principals, teachers and students) and at the district level (district administrators, principals, teachers and students) is sensitive to the institutional rules, norms and practices which combine to create a characteristic "ethos" or climate which can promote or inhibit achievement and other outputs in a school or a school district.

It may be possible to extend these arguments, by analogy, to the level of the central government, the province or the state. As Cohen (1983) asserts,

a multilevel perspective on schooling...facilitates a recognition that decisions made at higher levels of the system influence the use and effectiveness of ability practices at lower levels. Examining effective practices at each level is important as is examining the interrelationships among practices (p. 24).

Further, it is likely that central government policies, but particularly financial distribution policies, have a major impact on the educational environment in a province or a state,

since financial distribution policies, designed to achieve measures of equality, can have a profound effect on the nature of power-sharing arrangements between local and central authorities; the abilities of school districts to operate efficiently, and to adapt and to change in accordance with local needs and preferences; and ultimately, it seems, on student performance. In short, central government policies, and particularly financial distribution policies, may affect student performance to the extent that these policies provide incentives and controls which influence the behavior of key actors at the various levels down through the school system hierarchy.

Drawing upon school finance research and school effectiveness research, the remainder of this section explores linkages between the concept of equality of opportunity and (1) efficiency, and (2) diversity, or local control. The purpose of this discussion is to show how the values, equality, efficiency and diversity, can be regarded as mutually-sustaining values, rather than competing values in the design and organization of school systems.

The linkages between the concept, equality of opportunity, and efficiency can be made with guidance from effective schools research. In chapter four the case is made that maximum efficiency exists in an organization when necessary inputs are combined using least-cost production methods to achieve maximum goal attainment. Thus, the degree to which an organization, like a school district, achieves its goals, or, put another

way, the degree of effectiveness of an organization, is a crucial factor in determining its level of efficiency.

Equality of opportunity and efficiency can be regarded as mutually-reinforcing educational policy goals in the sense that increased levels of equality of opportunity will result in a province, state or district from successful efforts to improve the efficiency of all schools, but especially those with poor and mediocre track records in terms of student outcomes. It must be noted here that the concept of efficiency, as it was defined in the introduction to this paper, includes both cost and benefit criteria. Therefore, in the case of a school or school district, changes in programs and/or practices which do not require additional expenditures, but which improve student outcomes, can bring about improvements in levels of equality and efficiency simultaneously.

Effective schools research, with its emphasis on process elements, has shown that the way schools use resources can be as important, if not more important, than the actual quantity of these resources. Thus, if central government policy initiatives provide incentives to school districts which cause them to encourage genuine innovation in schools through the adoption of strategies from effective schools research, then any greater degrees of effectiveness in terms of achievement or goal attainment will also represent increased efficiency, providing that the district's level of resources remains constant, or even if it is reduced. However, as McDonnell

(1983) warns, most districts cannot afford innovation simply for its own sake. The innovations she recommends are those which (1) build on the effective schools research, and (2) are low in cost.

Thus, in times of fiscal retrenchment, work can begin on making schools more effective without increasing resource allocations to districts or schools. McDonnell (1983) notes that some of the key factors which have been associated with effective schools include:

The leadership role of the principal, particularly in instructional matters; agreement among the principal, teachers and parents about the schools' instructional goals; a school climate that is conducive to learning; high teacher expectations that students can perform regardless of their backgrounds; and a system for assessing student performance tied to instructional objectives. Other, related characteristics include: a strong sense of teacher efficacy; ongoing in-service training for teachers; a balance between strong principal leadership and teacher autonomy; and high levels of parent-teacher and teacher-principal contact (p. 75).

Clearly, attention could be paid to many of these factors without additional funding.

The linkages between the concept, equality of opportunity, and diversity can also be made with guidance from the effective schools research. As was pointed out earlier, equality advocates have long argued that increased centralization of authority in terms of financial and other regulatory policy-making would result in increased levels of equality. Local control, it was frequently argued, was responsible for the creation of inequities among districts in terms of service provision which, in turn, was thought to be responsible for

differential levels of effectiveness among districts. However, the effectiveness research presents quite a different case with regard to equality and diversity goals. If the knowledge which has evolved from effectiveness research is applied in practice, significant levels of autonomy at all levels throughout the school system organizational hierarchy will need to exist. The case has been made many times that the presence of enlightened leadership is extremely important at the school and district levels for the implementation of innovations. It could also be argued that leadership, at least in the form of policy initiatives, is important at the provincial or state level. However, at the district and school levels, McDonnell (1983) holds that

a balance needs to be struck between the authority of central office administrators and the autonomy of school-site staff. Within the limits imposed by districtwide objectives and resource constraints, teachers and principals need to be free to decide which instructional approaches make the most sense in their schools (p. 77).

Similarly, David (1983) stresses the importance of developing organizational structures which encourage school-based management approaches. She argues that

the advantage of school-based policies is that they allow school staff to decide for themselves which structure is most appropriate for their circumstances. (p. 124).

Thus, the adoption of appropriate innovations at all levels throughout the school system hierarchy seems to depend upon striking a balance between leadership and autonomy. If this conclusion holds true at the provincial level, then it would be the responsibility of provincial policy-makers to develop

policies which provide incentives that encourage the adoption of innovations arising from the effectiveness research, but, at the same time, which allow local districts the autonomy they require to decide for themselves which approaches and practices are the most appropriate for their particular circumstances.



CHAPTER FOUR: EFFICIENCY

Alice recoiled in terror until the King stepped over and whispered, "It's the law of the Empirical Realm, my dear. People are diverse and unpredictable, but you can always count on numbers."

-Maurice Gibbons,  
"Alice In Numberland: A Diversion"  
Educational Evaluation And Policy  
Analysis, Vol. 1, No. 3, May-June,  
1981, p. 103

Efficiency has been, and will continue to be, an important value in the design and operation of school systems because in every jurisdiction there is always a finite quantity of scarce real resources to spend on education.

During the past fifty years, one of the chief means employed by provincial and state governments, in their search for greater efficiency in school district operations, has been the consolidation of school districts. The conventional wisdom about local government which lent justification to waves of school district amalgamations in most jurisdictions on this continent, held that the creation of larger units

would usher in a new era of efficiency and equity in the public services through their advantages of greater size, economies of scale and greater professionalism (Boyd, 1980, p. 53).

Yet, after a detailed analysis of the most influential economy of scale studies of school district operations in the U.S., Sher (1977) concluded that the conventional wisdom that "bigger is better and cheaper" may have been "considerably more conventional than wise" (p. 76).

British Columbia has not been an exception to the rule.

In fact, in B.C., as recently as 1983, the government, concerned about rapidly rising expenditures on education, appointed the Sager Commission to investigate school district size and operating costs as an aspect of a restraint program. Although this commission was dissolved before reporting, it is apparent that the B.C. Government, like so many others in North America, considered the possibility of amalgamating school districts as a means of achieving greater economic efficiency in school district operations.

It is in the light of the conclusions of Boyd (1980) and Sher (1977) and the appointment of the Sager Commission by the Government of British Columbia that this chapter will examine the economy of scale issue which has so frequently been used by proponents of school district amalgamations as the cornerstone of their arguments for the economic advantages of large schools and districts. First, the origin and details of the concept of economy of scale will be explained. Second, the economy of scale issue will be examined in a theoretical sense as it is frequently applied to school systems. Third, six major problems connected with much of the research completed on economies of scale in school systems in Canada and the United States will be discussed in detail. The discussion section which concludes this chapter looks briefly at the notion of applying a process approach, derived from qualitative research methodologies, to the interactions and behaviours of provincial and local authorities with regard to financial distribution policies and the value, efficiency. Additionally,

this section explores the thesis that school districts will tend to pursue efficiency goals to the extent that internal and external structures provide the incentives and controls which allow and encourage them to do so.

### ORIGINS OF THE CONCEPT OF ECONOMY OF SCALE

Economists, particularly those working in the industrial sector of the economy, have long contemplated the concept of economy of scale. Economies of scale assume consistent product quality and exist when the cost of a unit of production decreases as the number of units produced increases. Diseconomies of scale exist when unit costs increase as the number of units produced increases, once again assuming that the quality of the goods produced remains constant. As Eckaus (1972) notes, some industries typically linked to the notion of economy of scale include railroads, electricity generation, natural gas transmission, as well as cement, steel and chemical production. Eckaus (1972) points out, by way of example, that

two electric companies in the same region, each with its own transmission lines going to next-door neighbours, will have higher "delivery costs" than one company (p. 471).

The point here, in theory at least, is that the greater the number of consumers of electricity making use of a single set of transmission lines, the lower the cost of the product to each consumer.

### ECONOMY OF SCALE STUDIES IN EDUCATION

Economists, working in the field of education, have attempted to apply the principles of economy of scale to operations in schools and school districts. In education, economy of scale exists when costs per pupil decline, as the number of students in a school or school district increases; diseconomy of scale exists when costs per pupil increase as the number of students in a school or school district increases.

Three major questions have been asked by educational economists in their numerous attempts to measure economies of scale in education: First, is there an optimal class or program size? Second, is there an optimal school size? And, third, is there an optimal school district size? ("Optimal" is generally taken to mean the size which maximizes benefits to students and minimizes costs). It is the latter question which provides the focus for this study.

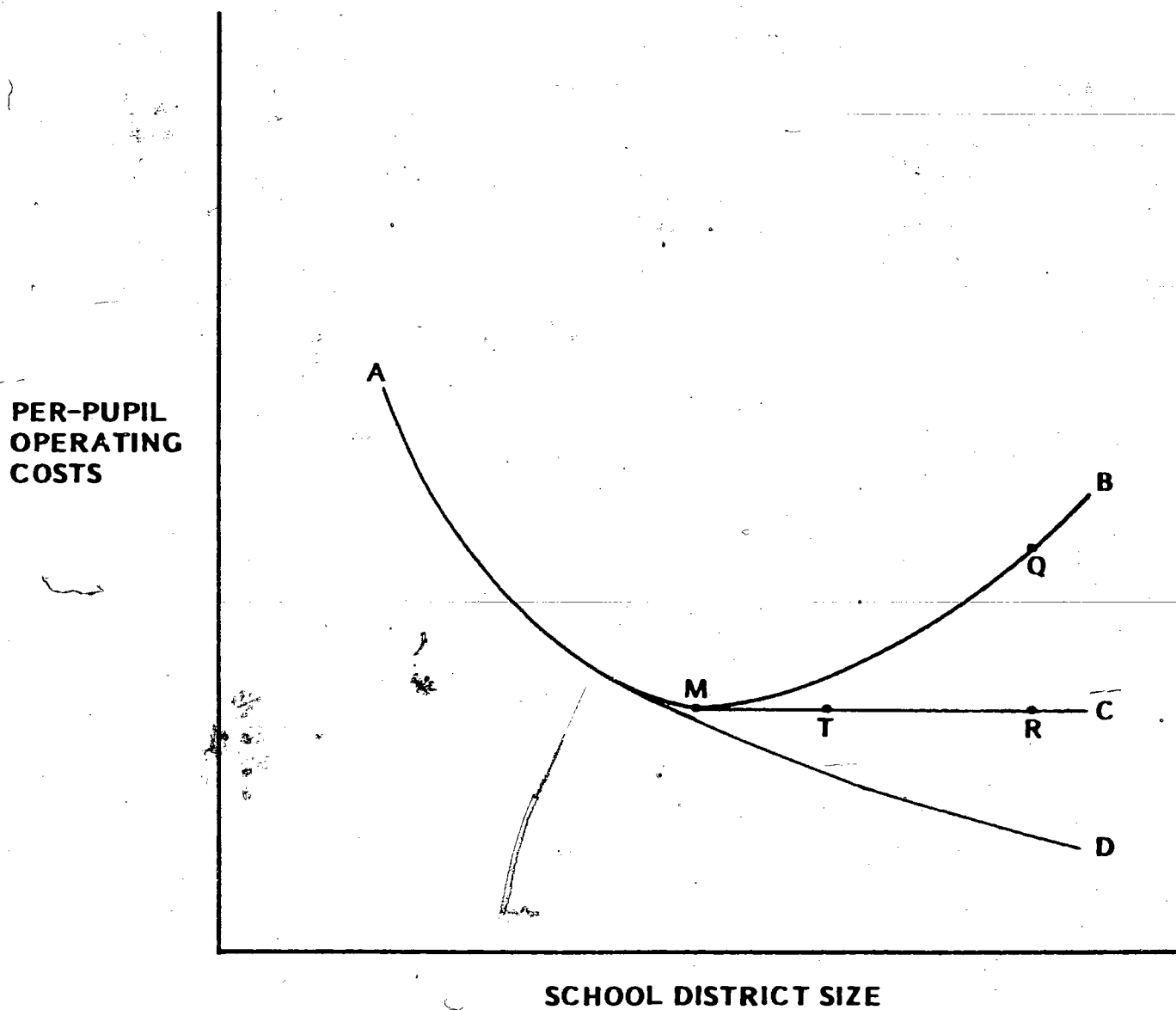
Shapiro (1971) outlines with clarity and simplicity, the theoretical road map which many educational economists have followed in their research on economies of scale in a host of jurisdictions. Shapiro (1971) notes:

A priori, a case for the existence of a cost-minimizing school district size can readily be developed from basic elements in micro-economic theory, simply by considering the school district as analogous to the firm (p. 76).

According to the analogies drawn by Shapiro, a school district produces an output--educated students--using a number of inputs--administrators, teachers, buildings, buses, etcetera. Small school districts are likely to experience high per pupil costs,

in theory at least, because specialist teachers and expensive equipment serve fewer children than would be the case in larger school districts. In short, small school districts may have higher costs as a result of "the inefficiency of combining limited inputs" (Shapiro, 1971, p. 76). But, as school district size increases, "it is likely that types as well as numbers of teachers may be combined in increasingly efficient ways, up to a point" (Shapiro, 1971, p. 76). Beyond a certain size, however, per pupil costs may once again begin to rise "as districts become so large as to require relatively high expenditures for administration or for transporting students" (Shapiro, 1971, p. 77). Figure 4-1 (below) depicts these theoretical cost curves which relate unit costs to school district size. The figure illustrates that, in theory, relating school district size to per/pupil costs should yield a curve similar to AB, AC, or AD. On the curve AB school district Q would be a large district, relative to all others in the system, in which existed major diseconomies of scale. The curve AC would indicate that once school districts in a given jurisdiction reached the size of school district M, further economies of scale, with increased district size, did not exist. Thus, on the curve AC, school districts T and R, although they differ considerably in terms of the number of students they serve, have the same unit costs. The curve AD represents a system in which the larger the school district, the lower the per-pupil costs.

So much, then, for the theoretical framework, borrowed

**FIGURE 4-1****SCHOOL DISTRICT SIZE AND PER-PUPIL OPERATING COSTS**

from economic theory developed in the industrial sector of the economy, which underlies much of the research conducted by economists in the educational sphere, regarding the principles of economies and diseconomies of scale in school systems.

The fundamental problem with the application of principles derived from the economics of industry, to the economics of education, rests with the widely divergent levels of complexity and measureability in the two domains. On this issue of complexity, Fox (1981) observes:

There are inherent weaknesses in using the production function approach to test for size economies in education. The production function is a rigidly defined relationship between factors of production and units of output. Because of difficulties in accounting for technology, managerial skill, and human capital, input/output relationships are difficult to empirically describe for production of physical outputs in private markets. Production functions are especially difficult to use for services, such as education, because the relationship between inputs and outputs has not been defined in conceptual terms (p. 278).

No single study of economies of scale in school district systems will provide policy-makers with any clear direction. And, taken together, neither do the twenty studies examined for this analysis provide much guidance to policy-makers. While the general message of such studies has been that "bigger is better and cheaper," the numbers, in fact, for optimal school district size in terms of cost effectiveness, differ in every study examined. As Coleman and LaRocque (1984) note,

Each new set of proposals for amalgamation seems to have asserted a larger unit as ideal: in the United States in the 1930's, 10,000 pupils were seen as the ideal unit; in the 1970's, 25,000 was frequently

recommended. In British Columbia, Cameron (1945) believed that a system employing 100 teachers was ideal; in 1970, Robinson recommends 15,000 pupils enrolled as the ideal unit (p. 73).

A general comment concerning many of the studies on economies of scale in education is that they focus a great deal of attention on the bottom line, which is frequently the optimum size for school districts that minimizes per student costs. At the same time, many of these studies devote only limited attention to the myriad of possible problems and issues connected with the application of the concept of economy of scale to educational services. It is thus the intent, here, to present a number of possible problems and assumptions which emerge from the twenty studies used in this analysis. The examination of problems and issues connected with the research, it is hoped, will provide policy-makers with some insights into the complexity of the continuing search for an optimum school district size, a quest which has proved as elusive to educators as the discovery of the perpetual motion machine has been to physicists.

#### PROBLEMS OF MEASUREMENT, DATA COLLECTION AND ANALYSIS

A major issue concerning much of the research on economies of scale in school district systems (not to mention research on a plethora of other questions in education, and the social sciences generally) includes problems with measurement, agreement about the definitions of terms and data collection and analysis. Sher (1977) reports that



with rare exceptions, this body of research is methodologically unsound, with almost every study open to criticism severe and significant enough to make the findings extremely suspect (p. 45).

Further to this, Fox (1981) notes that "educational output is comprised of quantity and quality aspects" (p. 281). The reader is reminded that "product quality" is assumed to exist in studies on scale economies in the industrial sector. In other words, if Factory Y produces Product X at an increasingly lower unit cost, as the number of units produced increases, it is assumed that the product quality does not change with the increased rate of production; if the concept of economy of scale is to apply. The problem, however, in education, is that "there is no general agreement on what constitutes a unit of either quantity or quality" (Fox, 1981, p. 281). Those researchers, then, who employ a quality variable in their studies of scale economies, and not all of them do employ such a variable, must use a surrogate or proxy for the measurement of "product quality." Sabulao and Hickrod (1971) posit that

cost-size studies which attempt, no matter how crudely, to control for quality of services provided must be considered superior to those studies that do not control for this variable (p. 180).

Some of the surrogates for product quality, although perhaps crude measures, as Sabulao and Hickrod (1971) suggest, include scores on admission tests to universities (Dawson and Dancey, 1974) gains in academic achievement calculated from scores on standardized tests administered over a number of years (Cohn, 1968), number of credit units taken at high school (Osburn, 1970), and the use of data from "accredited high schools only"

(Riew, 1972). Although Shapiro (1971) acknowledges that his study of the Alberta school system is problematic to the extent that it lacks data on quality, he sums up the measurement issue succinctly:

There is conceivably a district size which maximizes educational "benefits" per pupil; and there is no reason to assume that this size will also be that which minimizes educational costs per pupil (p. 120).

In addition to measurement problems, many studies of scale economies suffer deficiencies in terms of data analysis. Because many of the studies used data collected by provincial or state departments of education, these data may have been too general, in some cases, to provide accurate information about scale economies in large jurisdictions, particularly those containing significant regional differences in geography, population density, population distribution or transportation routes. Many studies calculated the average school size in each district by dividing the number of pupils in attendance therein by the number of schools in that district. The mean school size in each district, thus calculated, may bear no relationship to the actual sizes of schools in the district. Rosenberg's (1970) study of scale economies in California may provide extremely questionable findings because of data limitations which he acknowledges. He notes that

in order to make use of the data from districts with more than one high school, an assumption had to be made that school districts generally build and maintain high schools of approximately equal size (p. 138).

Rosenberg's assumption may well have been close to correct for

the California school districts used in his study, but it is highly unlikely that such assumptions could be made in the analysis of data from other jurisdictions.

### PROBLEMS WITH AGREEMENT ON THE DEFINITION OF TERMS

It should be made clear at this point that one of the most significant problems associated with measurement, in the economy of scale studies alluded to thus far, is a general lack of agreement about the definition of terms. Measurement difficulties are further compounded by a lack of consistency in terms of the "things" being measured or sought. Terms like "large," "small," "ideal," "efficient," "optimum," and "quality" have been defined in a great many different ways. While researchers may all have quite different definitions for each of these terms, the researchers' definitions may not correspond to the definitions given to such terms by individual schools, or local school boards, within the jurisdictions from which data were taken. On the questions of cost-efficiency and quality, for example, no research studies took into account the goals, or expected outcomes, of local school communities or local school boards, a serious deficiency it would seem.

It is evident that studies of scale economies in school district systems typically employ only one type of research--quantitative--and would do well to employ a combination of research techniques in order to provide more specific information which would be of use to policy-makers. Coleman and LaRocque (1984), Coleman (1971), and Robinson

(1971), for example, include interview data with statistical data. Coleman and LaRocque (1984) obtained interview data, through telephone calls to district superintendents, in order to assist their interpretation of statistical information in their study of scale economies in the twenty smallest school districts in British Columbia. As a result of these interviews, they were able to draw some tentative conclusions which they might not have been able to determine from reams of computer printouts. The conclusions will be discussed in greater detail subsequently.

#### PROBLEMS WITH THE DEFINITION OF SIZE COMPONENTS

Another major limitation of much of the research conducted on the question of economies of scale in school systems, is a generally inadequate definition of the term "size". With only a few exceptions, "size of school districts" is taken to mean "numbers of students in attendance in schools in that district." Holland and Bartielle (1975), and White and Tweeten (1973) provide the exceptions to this rule.

Clearly, the notion of size involves a number of factors which cannot be ignored. Certainly, size, in terms of numbers of students, is an important concept in scale economy studies. However, there are other relevant size factors, which must be considered because they relate to scale economy calculations. In addition to numbers of pupils, size refers to geographical size (square miles). In any scale economy calculations, the notion of population density (average number of persons per

square mile) and, perhaps even more important, population distribution, must be taken into account. Population distribution studies indicate population densities by region in a given unit of analysis. These factors are particularly important in a province like British Columbia which is somewhat larger in area than the states of Washington, Oregon and California combined, and in which vast differences exist in its various regions in terms of physical features, climate, and population densities. Thus, without taking these factors into account, studies of scale economies, such as the study by Wales (1973), may indeed suffer such deficiencies as would render them of questionable use to policy-makers. Considerable insight on this issue is provided by Fox (1981), Coleman and LaRocque (1984), White and Tweeten (1973), Holland and Bartielle (1975), and Sher (1977). Fox (1981) concluded that the major difficulty in using expenditures as a surrogate for all inputs (as economy of scale studies typically do) is that

production techniques may vary according to the population density of the area served by a school district and other factors. Less densely-populated areas, for example, may have more capital in the form of smaller and more numerous buildings, a factor which can be substituted for transporting students greater distances. Expenditures which vary because of different production techniques, provide no information on economies of size (p. 282).

White and Tweeten (1973), like Fox (1981), determined in their study of rural school districts in Oklahoma, that the shape of the longrun average cost curve, from which some determinations about optimal school size might be derived, represented "trade offs between internal schooling economies

and transportation diseconomies" (p. 45).

Holland and Bartielle (1975), following a similar research methodology to White and Tweeten (1973), but using data from school district operations in Eastern Washington State, and paying close attention to transportation costs, found that:

In both short-run and long-run models, cost savings were equal to approximately 1.3% of the annual schooling and transportation budget. Also, it should be pointed out that these estimates place no value on children's time. If only a nominal value is assigned as the opportunity cost of farm children's time, these estimates represent an upper limit to the true savings available from consolidation (p.568).

In a similar vein, Coleman and LaRocque (1984) discovered, through interviews with the superintendents of the twenty smallest school districts in British Columbia, that these small districts typically operate small schools and that school closure as a cost-control device had been considered and abandoned in all such districts, "because of the difficulty of transporting students to the next nearest school" (p. 14). Coleman and LaRocque (1984) mentioned one small elementary school, with only 11 students in attendance, with costs per student of \$4,662.00, where the district mean per pupil costs were almost half that figure (\$2,376.00). This school, however, was over forty kilometers from the closest school, over highways which are hazardous for much of the school year. Further, in some coastal school districts in British Columbia the closures of small schools with high per pupil costs would not likely result in overall cost savings because the students would have to be transported to other schools by water taxi.

The point here is that these costs do not go away when school districts are consolidated. As Coleman and LaRocque (1984) conclude:

The effect of amalgamating small districts with larger ones would simply be to spread the high costs over a larger population and hence conceal them (p. 12).

Support for the conclusions of Coleman and LaRoque (1984) is found in Sher (1977), who concludes his analysis of studies of size economies in school district systems with:

The traditional claim that consolidating rural school districts will, ipso facto, save money, appears to have no empirical or logical basis. It is simply incorrect to assert that consolidation is synonymous with economy (p. 51).

#### GENERALIZABILITY OF FINDINGS IN ECONOMY OF SCALE STUDIES

Another major limitation of the economy of scale studies conducted in a number of jurisdictions in Canada and the United States is that they supply policy-makers with very few conclusions which might be considered generalizable from one particular place and/or time to other places and/or other times. Examples of this lack of generalizability of both place and time follow.

A comparison of the White and Tweeten (1973) study with the work of Holland and Bartielle (1975) reveals a key point regarding the generalizability of research findings on scale economies from one place to another. White and Tweeten (1973) designed and conducted their study in Oklahoma and concluded, as was outlined above, that increasing the size of rural school districts would produce few economies, once transportation

costs were added to their calculations. They calculated transportation costs for a number of hypothetical school districts using a square-grid road network and went to considerable lengths to calculate the most cost-efficient school bus routes. Holland and Bartielle (1975) designed and conducted their study in a mountainous region of Eastern Washington State. They, like White and Tweeten, concluded that the consolidation of rural school districts would produce minimal cost savings when transportation costs were added to the total cost picture. Holland and Bartielle (1975), however, in their calculations, use an actual region of Eastern Washington State containing nine school districts in which the network of roads followed anything but a square-grid pattern. Thus, they conclude that limitations ought to be attached to the White and Tweeten (1973) study because "typically road grid systems are not square" (Holland and Bartielle, 1975, p. 568). The reality, however, is that in Oklahoma road grid systems are typically square, whereas, in Eastern Washington State, they are not square. It is thus clear that research approaches may indeed have to be tailored to take into account local conditions, of which geographical factors are only an example.

The findings of economy of scale studies may not be generalizable over time for a number of reasons. Shapiro (1971) noted that studies conducted in jurisdictions in years when enrolments were increasing may produce different results than studies conducted in a period of declining enrolments. Thus, in his study conducted in Alberta, Shapiro (1971) included,



as one of the variables, the rate of growth of enrolment.

The rate of growth of enrolment is included to allow for the fact that school districts in Alberta do not adjust their stocks of teachers fully from year to year in response to changes in desired stock. Accepting the growth in enrolment as a proxy for the discrepancy between desired stock and previous actual stock, it is clear that growing districts will employ fewer teachers than shrinking districts...and hence experience lower unit costs (p. 116).

To sum up this question of generalizability, then, a number of general comments are possible. Even though Holland and Bartielle (1975) hold that the whole issue of scale economies, and their particular conclusions, "are believed to be of wide interest and application" (p. 568), most other studies contain cautions regarding the generalizability of the findings they present. Both Fox (1981) and Shapiro (1971) go to considerable lengths to caution policy-makers regarding the generalizability of research findings on economies of scale questions. Fox (1981) warns that:

Size economies results must be applied cautiously, and with full recognition of the unique characteristics of each place, because considerations other than the findings that size economies exist, are vital to determining the cost implications of policy-decisions (p. 290).

It should be pointed out that the lack of generalizability of conclusions in economy of scale studies in terms of time and/or place is not so much a problem as it is a limitation. As long as policy-makers are cautioned that research findings in this area are unlikely to have wide application, they proceed with their deliberations on policy from a position of strength.

## ASSUMPTIONS ABOUT EQUAL COMPETENCE OF ADMINISTRATIONS

Another limitation of scale economy studies in education involves an assumption, made in all of the studies reviewed for this analysis, that school district administrations are equally competent. It may well be that such an assumption cannot, or perhaps should not, be made.

Returning briefly to economic theory developed in the industrial sector, it is clear that some economists in that sector are hesitant about assuming similar levels of competence with regard to management. Eckaus (1972) notes that

One idea made against this idea of maintaining constant costs by replicating inputs is that there is, finally, one necessary ingredient which simply cannot be replicated. That is the brain of the (person) who must manage and coordinate all the replicated fixed and variable inputs (p. 469).

It is evident in the research examined on scale economies in school systems that only very limited attention has been paid to possible variations in the competencies of school district administrations. As Coleman (1971b) points out, a most common assumption of studies of economies of scale is that "administrations of the various systems are equally competent" (p. 60). St. Louis and McNamara (1973) conclude in their study that it is a reasonable assumption that school districts operate in an equally efficient manner because, "what else can one assume when doing an economies of scale study" (p. 297)?

While intuition would dictate that a fairly defensible assumption about district administrations would be that they are not equally competent, it is clear that including a

variable on administrator competence in scale economy studies would involve, perhaps, insurmountable problems with defining "competence", determining some reasonably defensible proxy for measuring competence and then collecting the necessary data.

#### KNOWLEDGE PROBLEMS: HOW RESOURCES INFLUENCE ACHIEVEMENT

A final, but major problem with the numerous studies on scale economies in education concerns the limitations of our knowledge, generally, with regard to how resources in education influence achievement. In relating this issue to the economics of industry, we might assume, for example, that the Chrysler Corporation knows with reasonable certainty, about the costs of all of the inputs --labour and materials--which are required to produce a Chrysler automobile. We might also assume that the company attempts to utilize least-cost production processes. In education, however, the input-output equations are vastly more complex. As Hanushek (1981) comments: "Many of the studies fail to consider all of the input possibilities" (p. 27). In examining inputs, for example, in education, the labour factor would include teachers, administrators and other school personnel. Other labour inputs might also include the efforts of parents, and other members of a school community, which may assist with student growth, and yet may or may not appear as a cost factor in school district budgets. The concept of nonschool learning, although neither measured nor included in his analysis, is noted by Wales (1973).

A number of studies on scale economies include one or a number of teacher variables. The teacher variables which have been used in scale economy studies as proxies for instructional quality are outlined by Cohn and Riew (1974). The list includes variables on the number of different subjects taught by an individual teacher, the years of training, the years of experience and the salaries of teachers.

Another input frequently considered by scale economy studies is pupil-teacher ratio (PTR), but there is no general consensus about the effects of PTR on student outcomes. Wales (1973), Coleman and LaRocque (1984), Dawson and Dancey (1974), Shapiro (1971) and others have determined that small schools have higher PTR's than larger schools. Wales (1973) calculated that

in absolute terms, reductions in salary costs per pupil, arising from differences in PTR are the major factors contributing to declining average operating costs as school size increases (p. 719).

And yet, Hanushek (1981), after reviewing 109 studies which dealt with the relationships between inputs and achievement found that most of the studies (87 out of 109) "do not find a statistically significant relationship between teacher-student ratios and achievement, and thus offer little basis for the assumption that there is any relationship between the two" (p. 27).

It should be noted that there are a considerable number of individual schools in remote and isolated locations in British Columbia, for example, where the PTR is low, not

because of any conscious choices on the parts of school officials, but as an accident of geography. Coleman and LaRocque (1984) discuss a number of such schools in their study. A small isolated elementary school, with only 11 students enrolled in grades K-7, cannot adjust PTR (unless the school district decides not to supply a teacher to the school) costs notwithstanding.

Four other possible input variables which are discussed by reviewers of studies on scale economies in education, but which are not included in any of the studies used in this analysis, include socio-economic status (SES), IQ, student attitudes and family attitudes. Sher (1977) noted that those who pushed for the consolidation of school districts in the United States between 1930 and 1965 did not have the benefit of research studies using SES or IQ variables which affect student achievement.

Consequently, many researchers such as Feldt (who employed no controls) were quick to conclude, "the pupil who received his elementary education in a rural school and his secondary education in a small high school of one hundred or fewer students suffers a form of educational double jeopardy" (Sher, 1977, p. 63).

Sher (1977) goes on to point out that some considerable quantities of evidence on size and achievement correlations, which controlled for IQ and SES, were assembled and led to a "complete reversal of the traditional conclusions about the correlations between size and achievement" (p. 64). Sher (1977) states finally that

of the recent controlled studies, there is not one

that records a consistent positive correlation between size and achievement, independent of social class (p. 64).

In fact, in a study of costs and achievement as measures of school district effectiveness in British Columbia, Coleman (1985) found that while district size is not significantly associated with student achievement, "the unusually successful districts (districts with consistently high achievement and modest costs) are rather small" (p. 33). He further concluded that "size, beyond a modest level, might well be a handicap to effectiveness" (p. 33). Fox (1981), too, is critical of all research studies on scale economies which do not include variables on students and their families (as most do not). Fox (1981) holds that student and family characteristics are incorporated into the educational process, and therefore cannot be ignored in the scale economy calculations.

Students contribute their initial academic ability, which has generally been measured by IQ, along with their attitudes and willingness to work. Family attitudes and encouragement are other student input factors (Fox, 1981, p.284).

Limitations in the findings of studies on scale economies in education exist not only on the input side of the equation, but on the output side as well. As was stated above, the most frequently used proxies for "product quality" in education include student scores on admission tests to colleges, gains in academic achievement calculated from scores on standardized tests administered over a number of years, credit units taken in high school and the use of data from accredited high schools only. Such proxies for student achievement may certainly

reveal valuable data on the production, or output functions, of schooling, but it is quite clear that the exclusive reliance on these kinds of data may leave other important outputs unaccounted for in the quality equation, which forms an integral part of the economy of scale concept. Spencer and Wiley (1981) observe that educational goals are highly diverse with "school districts in close proximity often (having) very different goals" (p. 45). Thus, as was mentioned earlier, the most commonly used proxies for student achievement assume that goals are similar in all areas. It is Spencer and Wiley's (1981) thesis that it is "reckless to assume...goal differences will be independent of performance measurements, as the various studies assume" (p. 46). Because goals are diverse, it is not clear by what "units" educational outputs should be measured, and without such units, it may not be possible to determine the full extent of educational output.

### SUMMARY

This chapter set out to provide policy-makers with some insights into the problems and limitations which clearly exist in the twenty economy of scale studies reviewed for this analysis. It is hoped that this chapter will assist policy-makers to evaluate such studies before decisions are made concerning how the conclusions and recommendations, contained in economy of scale studies, are applied in practice.

This chapter began by defining and noting the origin of the concept of economy of scale in the industrial sector, and

then turned to an examination of the general problems which presented themselves when educators attempted to apply the concept to educational systems. This analysis then documented six major problem areas with regard to the application of the economies of scale studies to education. The measurement problem, presented first, examines some of the difficulties educators experience with the definition of terms and the measurement of the rather "slippery" inputs, outputs and processes which characterize educational systems. As well, data limitations and a number of data analysis problems were discussed. Next, the limitations imposed by an over-reliance on essentially one research methodology in the majority of economy of scale studies were presented. It is clear that those studies which combine statistical methodologies with interview data and/or case study approaches, are able to offer perspectives on economy of scale which statistical methods, used alone, cannot offer. Thirdly, this analysis focussed on the generally limited inclusion of a number of size factors in economy of scale studies which, it has been shown, render the findings, of a vast number of studies, extremely suspect. The inclusion of geographic and demographic size factors, in three studies examined, demonstrated the importance of including increased transportation costs in studies of proposed school district amalgamations. The fourth problem outlined in this analysis concerned the lack of generalizability from place to place or time to time, of many of the research studies on economies of scale. The message, here, was that each



jurisdiction should conduct its own local, regional, provincial or statewide studies on economies of scale. As well, studies conducted over a number of years may be more helpful to policy-makers who require information on the long-term effects of their policy decisions. Another problem examined in this analysis concerned an assumption, present in all of the studies reviewed, concerning the competence of administrations. All studies assumed that the administrations of school districts were equally competent. It was suggested that a more reasonable assumption would be that administrations are not, in fact, equally competent. Such an assumption, however, would create other problems in measurement, data collection and analysis, to name just a few. Finally, this chapter discussed the failure, on the parts of all of the studies examined, to consider all of the possible inputs and outputs of educational systems. Too few studies control for SES and none of those examined do more than mention the possibility of out-of-school learning. It was also noted that many studies, by design, expressed or implied relationships between resources--inputs--and student growth--outputs--relationships about which educators may have too little knowledge to formulate equations of correspondence. In addition, none of the studies reviewed gave any consideration to the diversity of possible goals which may be present in different local school systems.

**DISCUSSION: SCHOOL DISTRICTS WILL PURSUE EFFICIENCY GOALS TO THE EXTENT THAT INTERNAL AND EXTERNAL STRUCTURES PROVIDE THE**

INCENTIVES AND CONTROLS WHICH ALLOW AND ENCOURAGE THEM TO DO  
SO

It appears that the search for greater economic efficiency has frequently led governments in one general direction--toward the consolidation of school districts. However, the major conclusion of this chapter is that the consolidation of school districts is unlikely to lead to greater efficiency in school district operations. Apparently, policy-makers would be well-advised to consider other options in their pursuit of efficiency.

While studies employing quantitative methodologies, such as economy of scale studies, tend to focus on discrete elements, such as size or per-pupil expenditures, a number of studies which employ qualitative methodologies have stressed the importance of examining process elements.

In explaining why process elements seem to be more important in education than they may be in other areas, Murnane (1981) compares education to corn production.

the key difference is that in corn production, the key inputs, seed, water and fertilizer, are inanimate and their productivity depends only on the resource mix and on the weather, not on the method by which the resource allocation is determined. In education the key resources are students and teachers, whose behavior and productivity are very sensitive to the methods used to allocate resources (p. 28).

Using Murnane's central thesis, it may be possible to argue by analogy that at the school district level, the key actors are school boards and administrators and that their behaviors and productivity are sensitive to the incentives provided by

provincial resource allocation policies.

The thesis explored in this section is that school districts will tend to pursue efficiency goals to the extent that internal and external structures provide the incentives and controls which allow and encourage them to do so. The case will be made here that in jurisdictions where districts are to a large degree dependent upon local taxpayers for financial support, and, at the same time, are permitted sufficient local autonomy to tailor programs and practices to local needs and preferences, greater levels of efficiency will result than in systems where central governments provide most or all of the funding to districts and, at the same time, regulate the types of programs which districts are permitted to offer and define the practices districts are required to use to gain and maintain that support.

In British Columbia, since 1982, in an effort to stem what appeared to be a floodtide of spending by school districts, the provincial government brought down a number of legislative packages "to restrain the costs of the system" (New Financial Management System, 1983, p. 1). These legislative initiatives, which include a program budgeting system, have served to reduce local autonomy and centralize decision- and policy-making in the school system of British Columbia. At this point, it is evident that these measures have had a major impact on school district spending. As Fleming (1985) concluded,

if educational spending (in British Columbia) has not been cut drastically, its rate of increase has certainly been dampened (p. 9).

A cursory examination of the effects of these recent legislative initiatives on educational spending in B.C. may lead one to conclude that local autonomy is synonymous with inefficiency and/or that centralized control produces efficiency. However, a closer examination of the power sharing arrangements between central and local authorities, both before and after the promulgation of the restraint legislation, indicates that the conclusions noted above may be seriously flawed, if not completely incorrect.

Prior to 1983, before the introduction of restraint legislation, the government collected taxes from property owners; a basic school levy was provincially applied. Then, using a "financial formula based on levels of operating expenditure... devoid of education content about service levels," allocated funds to school districts through a program of allowances and grants (Fleming, 1985, p. 6). However,

local districts could increase, at their own discretion educational spending by taxing in excess of the basic school levy.... This they invariably did to meet special local needs and to support programs and services beyond the basic educational program required by provincial authorities (Fleming, 1985, p. 7).

These arrangements, in effect, gave local boards only partial autonomy in that school districts enjoyed the authority to develop new programs and to offer services beyond those required by the province, but they shared only to a very limited degree in the responsibility for funding these additional services. In essence, the incentives provided by this system encouraged school boards to increase spending and

to operate to some degree as if they had been given a blank cheque by the provincial government.

The characteristic ways in which school districts respond to local concerns or needs when they operate under such financial and power-sharing arrangements are worthy of mention here. Typically, when the public raised issues of concern or identified needs, school boards responded by adding programs, staff and facilities to address those concerns or needs. As long as money was relatively easy to come by, there was little incentive for school boards to re-prioritize goals so as to find additional funds for new services by reducing or eliminating existing services. In fact, Coleman (1985) argues that the higher spending levels of school boards, prior to the introduction of the restraint legislation, was the result of their funding services and activities not related to instruction. Coleman (1985) points out that in B.C. between 1980 and 1983, class sizes were increasing on average while the pupil-teacher ratio was declining. He concludes that

if the discrepancy between class size and PTR is treated as a measure of instructional focus, for the province as a whole instructional focus declined during the early 1980's (p. 30).

Thus it may appear that the greater degree of local autonomy which existed prior to the restraint legislation was responsible for higher spending levels by school boards. However, it has been argued here that these higher expenditure levels were more likely a product of the incentives provided by the nature of the power-sharing and finance policies which

existed prior to the restraint program's introduction. It was further noted that under pre-restraint policies, school boards were permitted greater degrees of autonomy in terms of decision-making, but did not share to any large degree in the burden of responsibility for financing their decisions. Thus, it is safe to say that, under pre-restraint policies, school boards really had only partial autonomy--they had power but little financial responsibility. Therefore, it is clear that while local autonomy per se may not be synonymous with inefficiency, the particular brand of local autonomy (local decision-making power without significant financial responsibility) which B.C. school boards enjoyed in the pre-restraint years, may indeed have provided incentives for school districts to operate inefficiently.

As an alternative to the restraint legislation which centralized decision- and policy-making power along with financial responsibility, greater levels of efficiency may have resulted from policies which left substantial decision- and policy-making authority with local boards, but which added a degree of local financial responsibility.

The restraint legislation dramatically increased the centralization of decision- and policy-making power in Victoria and has dampened the rate of increase in educational spending in British Columbia. However, to argue that this centralization has produced greater levels of efficiency does not necessarily follow. First, dampening the rate of increase of school district spending does not necessarily mean that the

school system has become more efficient because both goal and quality (effectiveness) criteria are as essential to the concept of efficiency as are the monetary considerations. Additionally, the case will be made here that the institutional environment in centralized systems which regulates both goals and means may also produce inefficiencies.

Rowan (1981) has argued that one of the major factors which promotes inefficiency in centralized school systems is the institutional environment in which these systems operate. The institutional environment promotes inefficiency to the degree that it regulates both goals and means.

In an institutional environment, organizational success depends upon judicious conformity to external requirements. When required types of inputs are processed using sanctioned techniques to attain socially mandated ends, institutionalized organizations receive numerous benefits. (Rowan, 1981, p. 55).

It would seem that Rowan's characterization of the institutional environment fairly accurately depicts the nature of the B.C. school system, given the degree of centralization which now exists under the program budgeting system used by the B.C. government to distribute funding to school districts, as well as other restraint legislation. (Recent legislation which has resulted in the increased centralization of decision- and policymaking in the B.C. school system is discussed in some detail in chapter five).

It was noted above that maximum efficiency is said to exist in an organization when necessary inputs are combined using least-cost production methods to achieve maximum goal

attainment. Thus, the degree to which an organization like a school district achieves its goals is an important factor in determining its level of efficiency. However, while some goals may be universal, others will differ significantly from school to school and district to district, given that communities differ in terms of needs and preferences with regard to schooling. As well, to the extent that the goals of schooling may differ among districts, the least-cost methods of production may also differ. Thus, in an ideal world, it might be possible to conclude that when the authority to combine necessary inputs to achieve locally-determined goals rests with local districts, least-cost methods of production would be used. But, in the real world, it may be that the greatest incentive for school boards to employ least-cost methods is the electoral process, providing that some degree of revenue autonomy exists at the local level.

Thus, the values, diversity and efficiency, can be regarded as mutually-sustaining values when local control of programs and practices and a sufficient degree of local revenue autonomy combine to become incentives for school districts to employ least-cost production methods.



CHAPTER FIVE: DIVERSITY

Liberty is the freedom to be different and freedom to be wrong. If man is a social animal, it is freedom for a community to be wrong, not because there is any virtue in being wrong but because human judgement is so fallible, so fickle, so relative, that it is dangerous to impose the same human judgement everywhere.

--Ioan Bowen Rees,  
Government By Community p. 102

To emphasize the value, diversity, in proposals and policies concerning the reorganization of school systems, is to devise systems which allow for or encourage provisions for differences among school districts based upon the kinds of differences which exist in the communities they serve. Diversity has been sought in the past through the creation of smaller, and/or decentralized administrative units and by instituting governance structures which allow for: citizen participation in decision- and policy-making; local control and lay control of education systems, rather than central control or control by professionals such as superintendents; and the curricular adaptation of school systems to their communities and to changes in those communities over time.

Studies on educational governance which favour and/or promote the value, diversity, abound and muster support from many deeply rooted social and political values (participation and self-reliance for example) which gave rise to, and serve to maintain, the democratic tradition in our society. It is clear

that a substantial measure of local district and/or local school control is crucial, if local officials are to be able to adapt school programs and services to the needs and preferences of the local residents in the communities they serve.

The introductory chapter to this study argues that the optimal policy options for school district reorganization schemes are those in which increased levels of equality, efficiency and diversity are joint products. Similarly, other policies which emphasize one or two of these values without detracting from one or both of the others, should be considered preferable to policy options which promote improvements to one or two value areas at the expense of one or both of the others. In British Columbia, however, it is evident that when diversity goals are seen to conflict with equality and efficiency criteria, diversity tends to be the value area which is frequently traded off in favour of seeking increased levels of equality and/or efficiency in the system.

This chapter looks at the meaning of citizen participation, examines the conventional wisdom on the relationship between citizen participation and school district size, offers two perspectives from which local government can be viewed, develops a working definition of centralization and decentralization and looks at the literature on trends--paradoxically, while some writers have found that current social values are leaning in favour of greater decentralization, others document trends toward greater centralization. It is clear that in British Columbia the

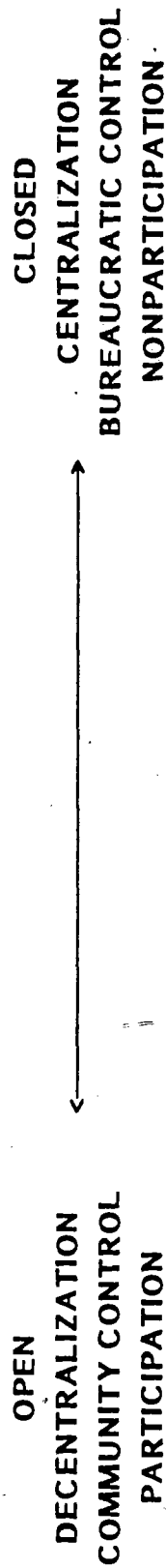
general trend over the last four decades, and particularly over the last three years, has been toward greater centralization. This analysis then focuses on the theme of expert vs. lay control and discusses issues related to community vs. society perspectives on the goals of education. This chapter concludes with an exploration of the thesis that school districts have become ineffective at meeting the needs of the communities within their boundaries to the extent that they are unable to adapt to local conditions and to changes in those conditions over time. It is suggested that structural reforms, such as the reorganization of school district boundaries, may not be a viable means of increasing the ability of school districts to adapt and change.

#### WHAT IS MEANT BY CITIZEN PARTICIPATION?

Many practitioners and theorists have called for more citizen participation in school affairs. Like so many slogans, "citizen participation" has meant many different things and has been used to describe a great number of participatory behaviours ranging from mothers helping out with school hot dog sales to kitchen chair discussions of educational issues to the cooperative citizen ownership and operation of schools outside the public school system. Saxe (1975) has developed a chart (See Figure 5-1) which represents types and gradations of citizen participation along a continuum ranging from very little, as in a closed, centralized, administrator-dominated system, to almost autonomous local arrangements which derive

FIGURE 5-1

SOME TYPES OF CITIZEN PARTICIPATION IN SCHOOL POLICY FORMATION:



FREE SCHOOLS OUTSIDE OF SYSTEM	COMMUNITY CONTROLLED SCHOOLS WITHIN SYSTEM	LOCAL COMMUNITY POLICY FORMING BOARDS	OPTIONAL SCHOOLS WITHIN SYSTEM	COMMUNITY ADVISORY COUNCIL IN EACH SCHOOL	ADMINISTRATIVE DECENTRALIZATION ONLY	COMMUNITY ADVISORY COUNCIL FOR DISTRICT	STRONG PTA USE OF PARENT AIDES	CENTRAL BOARD ONLY, NO OTHER PARTICIPATION
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**SOURCE:** Richard W. Saxe, *School-Community Interaction*, (Berkeley, California: McCutchan Publishing, 1975), p. 210

from an open, decentralized system actually controlled by a community. This analysis refers to citizen participation in terms of greater and lesser degrees of involvement with the policy-making process in a school district.

### SIZE AND PARTICIPATION: THE CONVENTIONAL WISDOM

Conventional wisdom would have us believe that citizens in smaller communities participate in the local affairs of school governments to a greater degree than larger communities. The purpose of this section is to note the possible sources of this conventional wisdom and then to briefly survey the education literature to ascertain the findings of those who have asked questions about the relationship between size and rates and types of participation in educational organizations. It would appear that the notion that smaller communities participate in the local affairs of school governments to a greater degree than larger communities has received little attention in educational research and has neither been affirmed nor challenged by empirical investigation.

The conventional wisdom that smaller communities participate more, and larger ones less, possibly derives from three broad types of studies; studies of rural communities, studies of urban communities, and studies in political geography.

Studies in rural communities, including those by Dunne (1977), Edmonds and Bessai (1975), Forsyth (1983), Gehlen (1969), Nachtigal (1982), Nash (1980), Peshkin (1982), Sher

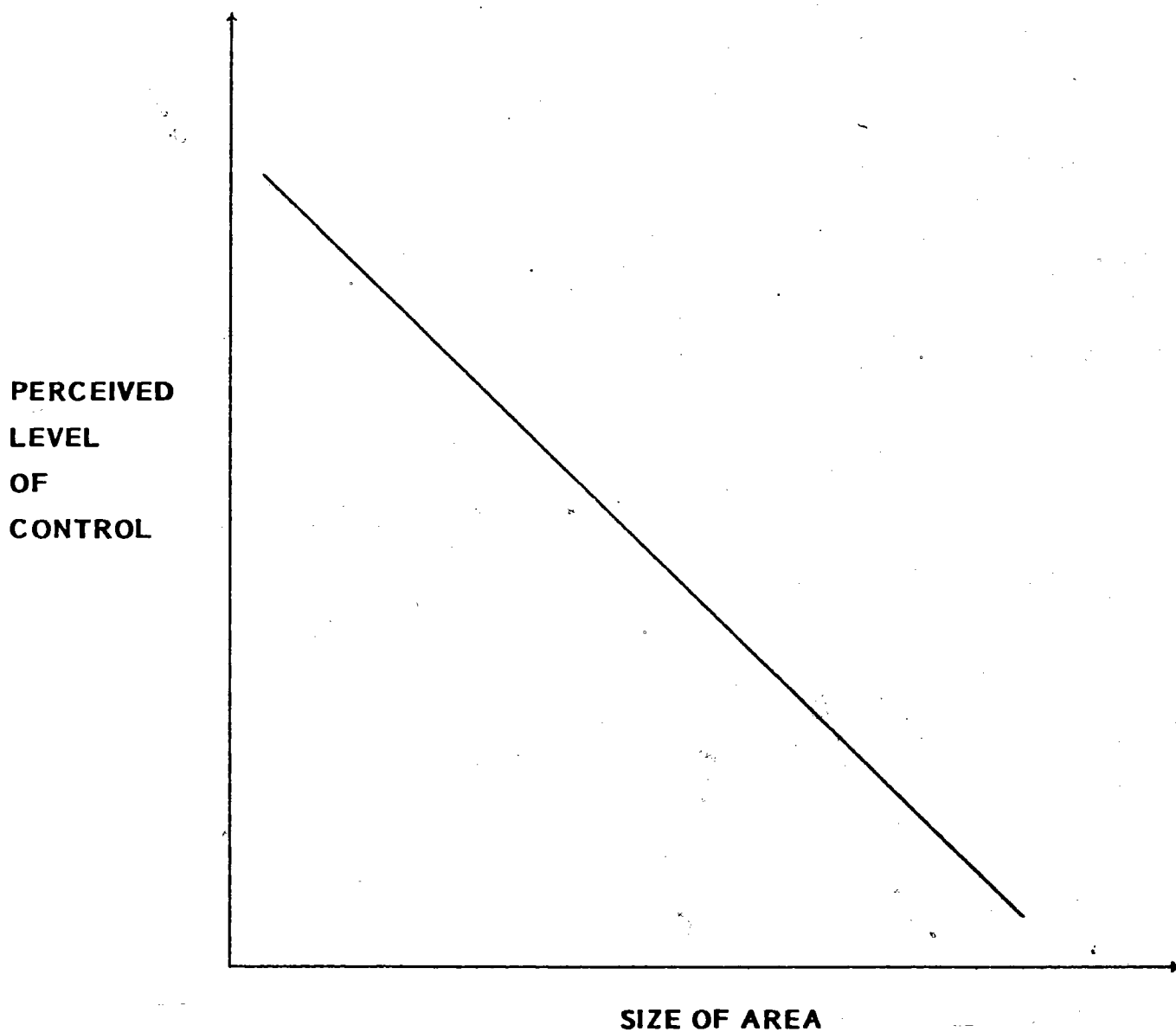
(1977), and Vidich and Bensman (1958), have examined various aspects of small, rural communities, villages and towns and discuss participants and participation in local school and/or local school government affairs. It should be made clear that none of these studies specifically sets out to investigate the relationship between rates and types of participation as a variable of community size. But, the general message which emerges from these studies is that small communities can be dynamic political entities in which significant numbers of local citizens become involved in school and school government affairs. It is, however, often difficult to interpret such works without some element of nostalgia creeping in. Many of these studies, for example, employ case study approaches and offer portraits of small communities where schools are a major focal point of community life. Readers with urban perspectives who have knowledge and/or experience of the isolation from the community of many large urban and suburban school systems, and of the lack of a sense of community in many urban and suburban areas, may conclude, correctly or incorrectly, that small size is necessarily an important prerequisite for community involvement.

Studies of urban communities, including those by Coleman (1971b), Fantini and Gittell (1973), Fantini and Weinstein (1968), Gittell (1967), Levin (1970), and Staples (1975), document from various aspects a general lack of ability on the parts of large centralized urban school systems to meet the diverse and often conflicting demands made upon them by the

many different communities and groups within their boundaries. A number of the studies noted above recommended that the larger systems be divided into smaller units with varying degrees of local autonomy. The general assumption made in many of these studies appears to have been that smaller units would be more adaptive and flexible and would attempt to involve local citizens to a greater degree in the affairs of their schools and school governments. Thus, many of the studies of citizen participation and urban school systems leave us to conclude, correctly or incorrectly, that large size is an impediment to citizen participation while smaller-sized units serve to encourage participation.

Studies in political geography also shed some light on the conventional wisdom that citizens in smaller communities participate in local government affairs more than citizens in larger communities. Massam (1975) hypothesized that the geographical size of a government unit was related to citizens' perceptions about the degree of control they held over their local government institutions. He concluded that a community's perceived level of control was inversely related to the geographical size of a local government unit. Figure 5-2 graphically portrays Massam's conception of the relationship between perceived control and area size. It must be pointed out that Massam's work does not add to our knowledge of the relationship between school district size and degrees and types of citizen participation in policy-making because it is conceivable that citizens in small districts may perceive that

THE RELATIONSHIP BETWEEN PERCEIVED CONTROL AND SIZE OF AREA



SOURCE: Bryan Massam, Location and Space In Social Administration, (New York: John Wiley and Sons, 1975), p. 35



they have significant control over the policies developed by their school board without actually exhibiting any of the behaviours normally associated with participation. By the same token, it is possible that, say, a single-issue interest group could participate in a public policy debate in a large urban area and, not managing to establish its view in the final policy statement, perceive that it had little control over the affairs of local government. Perceptions about control, then, may not add to our knowledge about the relationship between school district size and rates and types of citizen participation. These perceptions, however, lend credence to the notions expressed and implied in studies of urban and rural communities that large size inhibits participation, perhaps because citizens perceive that they have little control, hence tend not to bother getting involved; and that small size encourages participation because citizens perceive that they have greater control and that their involvement makes a difference.

Three survey studies which specifically set out to investigate aspects of the relationship between school district size and citizen participation were reviewed for this analysis. None turned up any empirical evidence which would support or contradict the conventional wisdom.

Coleman (1971b) advised that

the differential levels of citizen participation in policy-making between large and small school districts remains at this point an assumption. It has not been shown to exist in any significant study...within the knowledge of the writer...(p. 20).

Similarly, after studying both American and British sources, David (1976) concluded that

no evidence has been presented that there is more political participation by elected representatives or citizens in the smaller than in the larger local authority (p. 87).

Finally, Guthrie's (1979) investigation of the same question led to similar conclusions. Guthrie (1979) sought an answer to the question: "Has the increase in school and school district size had any effect upon political participation over school matters" (p. 24)? He notes the difficulties facing any researcher who attempts to answer such questions, because of the intervention of innumerable forces during the period of school consolidation. Some of these forces listed by Guthrie (1979) include the increased involvement of central governments in educational policy-making, increased professional educator influence and the growth of large urban communities at the expense of smaller rural ones. Guthrie (1979) thus determined that research into the question of school district size and political participation would be tremendously difficult and in the absence of such research "it is possible only to speculate about the answers to such questions" (p. 24).

The key message for policy-makers who must decide about school district size, then, is that the belief that smaller districts encourage citizen participation because of their size, or the inverse, that large districts discourage participation because of their size, is only conventional wisdom. In the absence of empirical research, Davies (1975) concluded about decentralization efforts in a number of large

urban school systems that the creation of smaller units

does not assure any real change in community participation or increased roles for teachers or students in decision-making (but) it can open up new possibilities for reallocation of authority and for participatory involvement in decision-making (p. 35). (Emphasis added).

## TWO COMPETING PERSPECTIVES ON LOCAL GOVERNMENT

Before examining two theoretical perspectives or views of local government institutions, one important point of clarification, upon which hinges any discussion of local government issues, must be made. By virtue of the terms of the Constitution of Canada,

local governments are 'creatures' of the provincial government(s). (They) can create and destroy them at will... (Hanson, 1956, p. 66).

Thus it is clear that the existence of local school boards, and the terms of their existence, are determined by provincial legislation; they cannot, legally speaking, be viewed as entities unto themselves.

Having acknowledged possible limitations resulting from the legal framework in which local governments operate, then, there remain, in theory at least, two fundamentally different perspectives from which local government structures can be viewed: from the top down and from the bottom up. Rees (1971) explains these perspectives as follows:

Those who look from the top down consider that the whole authority of the state is concentrated at the center. To them the center is the only legitimate source of power: it is from the central government that local authorities receive their powers (p. 2).

The central government, desirous of providing services to local communities in an efficient and equitable manner, involves citizens in all localities with the business of government "not so much in order to hear their views, as in order to embrace them and make them identify themselves with the system" (p. 2). This perspective, according to Rees (1971), derives from what he has called the "classical school" of local government and he notes that its proponents are generally more interested in uniform standards than local responsibility.

A second perspective, deriving from what Rees (1971) has named the "romantic" or "historical school" views local government units

as a conglomeration of localities, each of which has, it is true, surrendered much of its authority to the center, but each of which retains some authority in its own right as well as a basic identity of its very own (p. 2).

In the romantic school, local authorities are considered "nurseries of democratic citizenship" (Rees, 1971, p. 2) where community differences, local initiative and citizen participation are valued far above central control.

These two perspectives from which local governments might be viewed represent theoretical extremes. Nevertheless, these perspectives may in general ways represent, on the one hand, the perspectives of central governments which, it was pointed out above, determine the nature of power sharing between central and local authorities, and, on the other hand, the views of some local trustees, citizens, theorists and reformers about how power sharing arrangements "might" or "should" be

determined. The theme, here, is centralization/decentralization; an analysis of apparently contradictory perceptions about trends follows, after working definitions of the terms "centralization" and "decentralization" have been established.

### WHAT IS MEANT BY CENTRALIZATION AND DECENTRALIZATION?

The terms "centralization" and "decentralization" refer to structural adjustments or policies which shift the locus of control between central and local authorities. These terms have been used to describe such shifts on at least three different levels, only one of which is examined in this analysis. "Centralization" has been used to describe a transfer of decision-making power from individual schools to school district offices; from regions or areas, particularly in large urban school districts, to a central or regional district agency; and from school district governments to provincial or state governments. "Decentralization" is the term used to describe shifts in the locus of decision-making authority in the opposite directions. In this analysis, the terms "centralization" and "decentralization" refer to shifts in the locus of decision-making authority to provincial, or state governments, from local school districts and vice versa respectively.

### PERSPECTIVES ON TRENDS IN CENTRALIZATION AND DECENTRALIZATION

On the one hand, writers of popular books on trends in

politics, culture and personal values, as well as more academic writers on trends in political and economic perspectives, document an apparent shift in values in society which favours decentralization. Naisbitt's (1982) Megatrends includes a chapter on the centralization/decentralization theme and asserts that

demands for greater bottom-up participation in policy-making have led to the restructuring of many political processes.... Because of a long tradition of local control, education is a natural issue for community activism (p. 122).

Similarly, Yankelovich's (1981) book, New Rules, speaks about a new emphasis in American culture on "quality-of-life movements ('small is beautiful')" and on "self-help, localism and participation" (p. 4). More academic publications, for example, Decentralist Trends In Western Democracies, edited by L.J. Sharpe (1979), examine the emergence of neighbourhood councils and other movements to strengthen local governments. Jacobs' (1984) Cities And The Wealth Of Nations makes a case for a new theory of economic life which focuses on the economic organization of individual cities, rather than on larger nation states. The biological metaphor used by Jacobs (1984) to present her central thesis, which calls for the recognition of economic diversity among individual cities and regions in a nation, might also be considered a potent metaphor for pro-localists to use in response to the questions: Why do we need local school boards? and, Why does the Provincial Government (or State Government) not simply use its expertise to develop a "one best system" (Tyack, 1981, p. 30) and

administer the schools from the capital?

National currencies...give potent feedback but are impotent at triggering appropriate corrections. To picture how such a thing can be, imagine a group of people who are all properly equipped with diaphragms and lungs but who share among them only one brainstem breathing center. In this goofy arrangement, the breathing center would receive consolidated feedback on the carbon-dioxide level of the whole group and would be unable to discriminate among the individuals producing it. Everybody's diaphragm would be triggered to contract at the same time. But suppose some of those people were sleeping while others were playing tennis. Suppose some were reading...while others were chopping wood. Some would have to stop what they were doing and subside into a lower level of activity. Worse yet, suppose some were swimming and diving, and for some reason, such as the breaking of the surf, had no control over when they were submerged. Imagine what would happen to them. In such an arrangement, the feedback control would be working perfectly on its own terms but the results would be wretched, because of a flaw designed right into the system (Jacobs, 1984, p. 55).

On the other hand, other writers on the theme of centralization/decentralization document trends toward a greater centralization of powers in educational policy-making in the U.S.. Mitchell and Encarnation (1984), for example, conclude that

state-level policy-making, especially in education, has become a major focal point for supporters and critics of current governmental services.... A wide variety of political, economic and social forces have been responsible for shifting the initiative in educational policy formation away from local and federal actors to state-level policy systems (p. 4).

The reasons cited by Mitchell and Encarnation (1984) for this apparent shift include: continued pressure from disadvantaged and/or minority groups for intervention on the parts of state governments in local affairs in the interest of providing more equitable service provision and access to services, and a

general concern for declining productivity expressed by society generally, but industry and the universities particularly. It is thus apparent that pressure groups in society have sought, and many times gained, the assistance of central governments in finding solutions to problems related to schooling which have tended to overwhelm local school boards.

### TRENDS TOWARD GREATER CENTRALIZATION IN BRITISH COLUMBIA

In British Columbia, three primary concerns of taxpayers and parents which emerged in the late 1970's and early 1980's included (1) excessive spending by school boards resulting in relatively large property-tax increases, (2) disparities in how school taxes were raised, and (3) a perceived lack of excellence in student achievement.

In 1980 and 1981, with the economy of B.C. in recession, taxpayer groups petitioned provincial government leaders demanding reductions in government spending and taxation. One of the major sore spots with taxpayers was the 19% average increase in school board budgets between 1980 and 1981 which caused school taxes on single family dwellings to increase approximately 25%, on average, over the previous year (Fleming, 1985, p. 6). Under provincial legislation, prior to 1983, when school district budgets exceeded the total of provincial allowances and grants,

local districts could increase at their own discretion, educational spending by taxing in excess of the basic school levy that was provincially applied (Fleming, 1985, p. 6).

Another major source of complaint for taxpayer groups



appeared to be disparities in how taxes were raised. For example, school districts with large non-residential tax bases were able to raise additional tax revenues with less effect on home owners than were school districts with small non-residential tax bases.

Since 1982, the province, rather than the local school boards, responded to these issues of concern with several legislative packages which empowered the government to:

1. control arbitration awards for teachers' salaries,
2. determine spending levels for local school boards,
3. remove the non-residential tax base from the jurisdiction of local authorities, and
4. set levels of educational service in accordance with newly-developed criteria.  
(Fleming, 1985, p. 8).

In addition, in 1983, in response to public concerns about the quality of education in B.C. schools, Provincial Departmental Examinations were introduced and counted for 50% of every student's final grade in academic grade 12 subjects.

With regard to recent trends toward increased centralization of policy-making in British Columbia, a number of conclusions are possible. First, it is apparent that the provincial government has been more responsive to taxpayer concerns over rapidly rising school board expenditures than have locally-elected school boards. Second, the trend toward increased centralization of educational policy-making in B.C., in many respects, runs parallel to trends outlined in a number of U.S. studies reviewed by Mitchell and Encarnation (1984).

Finally, it is clear that with the degree of centralization which now exists in the school system of B.C., taxpayers and locally-elected boards have very little say in determining the extent to which they want to support the schools, nor do locally-elected representatives have much room left to manoeuvre in terms of developing local programs in response to community needs and preferences.

#### POLICY AND PRACTICE: POLICY VALUES CHANGED IN PRACTICE

On the question of emphasis assigned to the value, diversity, in proposals and policies concerning school district organization, policy-makers at all levels need to be aware of distinctions between value-laden slogans, or theories, and practices. As Ornstein (1973) cautions,

decentralization, community control, even community participation--are mainly slogans rather than closely worked-out concepts with consequences understood and accounted for (p. 513).

While many deeply-rooted social and political values (participation, and self-reliance, for example) impact upon theories of governance which favour diversity, the effects of policies designed to give such theories practical application in the real world may not produce structures which actually operate according to those theoretical value systems. In concrete terms, some theorists (Boyd, 1978, and Rees, 1971) make the case, for example, that local self-government must be considered "a value unto itself" (Boyd, 1978, p. 622), and while policy-makers may agree with such a theoretical construct

in principle, it may be extremely difficult to legislate such theories into local government practices. The next issue to be discussed illustrates this point. In many educational systems, policies designed to support local, lay control of school districts, it has been argued in many studies, actually produced structures which encourage the control of school systems by bureaucrats or professional educators.

### EXPERT VS. LAY CONTROL IN LOCAL SCHOOL DISTRICTS

Mario Fantini, in his foreword to Marilyn Gittell's (1967) study of school policy in New York, Participants and Participation, discusses the role of an enduring mythology in public perceptions about school governance. He begins:

Once upon a time, the people created public schools and the schools belonged to them (p. vii).

Later he observes,

The people still pay for public education, and it is from them that the public schools draw continuing sanction. But it is a myth that sanction and support add up to control (p. vii).

Finally, Fantini explores the thesis that control of public education has been given over almost exclusively to management and that, as a result, many large school systems have taken on the characteristics of huge corporate enterprises, increasingly distant from the public. While Zenke (1975) attributes this well-documented lack of responsiveness on the parts of school boards to their communities to factors of size (i.e. the larger the organization the less responsive), van Geel (1976), Gittell (1967), Zeigler and Tucker (1981) and others attribute much of

this lack of responsiveness to administrator dominance of school board decision- and policy-making.

Three major reasons cited in the American literature on school governance, for the gradual transfer of power during the last forty-and-more years from lay persons to professional administrators include:

- 1) perceptions that petty corruption in local government could be minimized if "neutral" or professional administrators or bureaucrats were more closely involved in the process,
- 2) the seeming inability of lay persons to understand the complexities of specialization in reorganized larger systems, and
- 3) perceived feelings of inadequacy on the parts of less-educated lay persons to compete with highly educated specialists for influence in decision- and policy-making.

It is noteworthy that a number of diverse studies of the school system in British Columbia document, or give credence to, the reasons cited in the American literature for the increased influence of professionals in local school board decision-making.

H.B. King in his 1935 report to the Minister of Education, School Finance In British Columbia, advocated giving virtually all local decision-and policy-making power to professional administrators as a method of removing the "politics" and corruption from local school governments.

The American literature notes secondly that lay persons tended to rely more on professional advisors when school systems were reorganized and became larger and more complex, employing a greater number of specialists. A parallel current

is evident in at least one study conducted in British Columbia.

J.F.K. English (1956), The Assistant Deputy Minister in The Department of Education in Victoria, wrote a doctoral dissertation on the effects of the massive reorganizations of the school district system in 1946, following the Cameron Report. English (1956) concluded that

boards take advantage of the professional knowledge, experience and training of the inspector. There is, however, a definite impression that boards of larger units make so many general demands upon the inspector that his work as the supervisor of instruction suffers (p. 27).

This finding would indicate that after the creation of larger school districts in British Columbia the role of the school inspector, at least in the larger units, was changing from a supervisor of instruction to a trustee advisor, perhaps because of the new complexities brought about by the creation of larger units of administration.

The third reason for the increase in the power of professional administrators at the expense of lay persons, indicated in the American literature, relates to the second reason, discussed above, but concerns the perceived feelings of inadequacy on the parts of lay persons to compete with highly-educated specialists for influence in decision-making. This education gap between elected and appointed officials in local school districts, which perhaps led to feelings of inadequacy on the parts of elected officials, may also have been one of the reasons why citizens generally, but particularly the less educated ones, tended to be less inclined

to participate in local school affairs as the more highly-educated professionals gained increased influence with local trustees. On this point, Sharpe (1979), having examined a number of sociological studies, concluded that

there is a great deal of evidence suggesting that a decisive factor in influencing the extent to which people participate in politics and get involved in voluntary group activity is the length of formal education they have been exposed to (p. 28).

Dickinson (1970) conducted a study in the Okanagan region of British Columbia and his findings corroborate those of Sharpe (1979). Dickinson (1970) found that "educational attainment is inversely related to alienation" (p. 11). Dickinson's findings shed at least some light on the possible reasons for non-participation in public affairs of citizens of low educational attainment in British Columbia which support the reasons cited in the American literature for the increased influence of the "expert", or the professional administrator, and the concomitant decrease in influence of lay persons in school affairs.

#### CONFLICTING GOAL PERSPECTIVES: SOCIETY VS. COMMUNITY

The value, diversity, if emphasized in proposals and policies concerning school district structures, would require or create structures which would allow school systems to adapt themselves to the expectations of the communities they serve: each district would be responsible for formulating its own answer to the question: What are schools for? As Coleman

(1971) has determined, the responses to this question "may range on a continuum from an extreme societal view to an extreme community view" (p. 7). In order to distinguish between the values of community and society, Coleman cites the definitions given by Newmann and Oliver (1969):

(A community) signifies a closely knit, generally self-sufficient rural group in which the extended family serves not only the functions of economic production, but also education, recreation, religion, care of the sick and aged, safety, and defence. Individuals in such a group know each other well; they share common experiences and traditions; they depend upon each other, and assume responsibility for solving group problems. Style of life varies inappreciably from one generation to the next.

A sharp contrast to this type of group is mass society, characterized by large numbers of people within an urban industrial environment, influenced by many institutions each of which performs the separate functions of education, religion, economic production, defence, medicine, recreation, care of the aged, and legal and political control. People shift their places of residence, change their occupations and follow living styles quite different from those of previous generations. Because of mobility, specialization, and a rapid rate of change, people have less in common with each other, and weaker ties to a basic or primary group; their allegiances and loyalties are diffused among many social units instead of focused on one (p. 7).

In response, then, to the question, What are schools for?, one who views the system from a community perspective would hold that schools should be preparing young people for a place in the local community alongside their parents. By contrast, one with a society perspective would want schools to offer a broad program to prepare students for mobility in the competitive world outside the community, in the larger society.

When the question of school district size is considered, the smaller districts "can more easily approximate community

norms," whereas larger districts, which tend to offer a broader range of services, may more closely approximate the society perspective (Coleman, 1971, p. 9). It would appear, then, that the move to fewer and larger districts in many jurisdictions has represented a vast number of victories for the society perspective over the community view. It is clear, also, that the triumphs of the society perspective represent victories for the value, equality (in the sense of "sameness") over diversity.

It must be noted once again that provincial policy-makers determine the balance of power, of the terms of control-sharing with local school districts. Given this legal fact of life, it is worthy of comment that those "experts" to whom the central policy-makers have turned for advice have historically shown an overwhelming bias toward the society perspective. An examination of the academic credentials of the authors of reports to the provincial government on school district reorganization, as well as an analysis of the value perspectives in those reports (Chapter 2) lends credence to this observation. A more recent report (more recent than those discussed in Chapter 2) is one further piece of evidence which illustrates the preponderance of the society view bias on the goals of education.

In 1974, the Small Senior Secondary School Study Committee prepared An Interim Report to the Minister of Education for British Columbia which noted that the small secondary schools in B.C. tended to be in sparsely-populated, rural and isolated



communities and adopted the philosophy that "the aims of the small senior secondary schools should not differ from those of any school in the province" (p. 2). The report further stated that small secondary schools were essential

if secondary school pupils living in remote areas of the province are going to be provided the same opportunities as those students living in more populated areas (p. 2).

Clearly, while the report acknowledges that funding formulae should be adjusted to allow for greater equality between large and small schools in terms of service provision, it argues that the goals of education should be similar, if not identical, throughout the province and thereby flies in the face of the value, diversity. The conclusions of the 1974 report are also illustrative of what Tyack (1981) has identified as a significant theme in U.S. education history--the search for "the one best system" (p. 30).

### SUMMARY

This chapter examined the meaning of citizen participation, noting that the term was a slogan and referred to a number of possible participatory behaviours which had been arranged on a continuum by Saxe (1975). Then, pointing out the absence of empirical studies on the relationship between school district size and degrees and types of citizen participation, this chapter looked at the possible sources of the conventional wisdom on this issue--conventional wisdom which is assumed to be truth in a plethora of studies. This chapter then turned to

an analysis of a number of factors whose combined effects have tended to reinforce uniformity rather than diversity in school district operations. First, legally speaking, the provincial governments in Canada hold all of the cards in that it is their responsibility to determine and adjust the nature of power-sharing arrangements between themselves and the local district boards. Second, while some writers note general trends in both theory and practice toward an increasing emphasis on decentralization, others have noted and supplied evidence to support opposite perceived tendencies in terms of power-sharing arrangements between central and local authorities which govern schools. In British Columbia, for example, it was pointed out that it was the Provincial Government which recently seized the initiative from local boards on issues concerning finance and quality--issues which had apparently overwhelmed many local boards in the Province. Third, the trend over the last forty-and-more years toward increased administrator control of local board policy-making was documented. Finally, two perspectives on the goals of education were discussed and the case was made that the society perspective, represented by the larger school district units, had won a long series of victories over the community perspective. It was also noted that the bulk of reports submitted to the provincial policy-makers tended to lean toward the society perspective in that they generally emphasized equality of service provision and the establishment of identical goals for districts in urban, suburban and rural

communities alike. It is thus clear that while policy-makers may have intended to encourage diversity among school systems in the past, a variety of forces inside school districts, in the province and in the greater society, have tended to create structures which appear to be far more uniform than diverse.

**DISCUSSION: SCHOOL DISTRICTS ARE EFFECTIVE IN MEETING LOCAL NEEDS TO THE EXTENT THAT THEY ARE ABLE TO CHANGE AND ADAPT**

The thesis explored in this section is that school districts are effective in meeting the needs of the communities within their boundaries to the extent that they are able to adapt themselves to the needs of those communities and to changes in those communities over time. The overwhelming emphasis on the structural reform of school districts (moving boundaries and consolidation) which arose out of an enduring desire to achieve greater measures of equality and efficiency have tended to create a system which exemplifies the values of uniformity and conformity.

It may well be that the warnings in Cameron's Report Of The Commission of Inquiry Into Educational Finance, published in 1945, on the dangers of centralization were, in some respects, prophetic. Cameron (1945) warned of rigidity, and the inevitable development of promotional policies based on seniority and conformity. He talked about the tendencies of large organizations to turn in on themselves, to become obsessed with their own machinery and to ignore the immense importance of human beings and human interactions. He noted

that "uniformity is almost the same as a lack of progress" (Cameron, 1945, p. 37), and warned that flexibility had to be built into any system whose chief priority was equality of service provision in a jurisdiction as vast as British Columbia.

It could be that increased levels of diversity, (diversity subsumes the notions of citizen participation, lay control, local control, and decentralized decision- and policy-making) could be achieved through changes in organizational attitudes and behaviours rather than through structural (boundary) reforms. In terms of reform, Berman and McLaughlin (1979) have hypothesized that

what matters most is not what comes in to a school district, but what the district does with it (p. 8). (Emphasis in the original.)

Further to this, on the topic of change, Fullan (1982) points out that

real change, whether desired or not, whether imposed or voluntarily pursued, represents a serious personal and collective experience characterized by ambivalence and uncertainty and if the change works out it can result in a sense of mastery, accomplishment and professional growth.... The anxieties and uncertainty and the joys of mastery are central to the subjective meaning of educational change, and to the success or failure--facts which have not been recognized or appreciated in most attempts at reform (p. 26).

Murnane (1981) also notes the importance of examining the behaviours and attitudes of key actors within the school systems.

The relationships between the primary inputs--teachers, students and families--and the

outputs--student skills--depend critically on the behaviour of (these) key actors. Their behaviour is sensitive to the incentives provided by the school system (p. 32).

The work of Berman and McLaughlin (1979), Fullan (1982) and Murnane (1981) emphasizes the necessity of examining relationships, attitudes and behaviours in studies of change and effectiveness in school systems. A closer examination of the work of Berman and McLaughlin (1979), because of its focus on the school district, may yield some new insights which will assist educators to answer the question: How can greater diversity be achieved in school systems?

Berman and McLaughlin (1979) developed descriptions of two theoretical states of school district development according to their adaptive attitudes and behaviours. To determine these behavioural or attitudinal states, Berman and McLaughlin (1979) looked at how school districts responded to five basic dilemmas. A district's responses to these dilemmas allowed it to be classified as being in a state of "maintenance" or "development."

The five dilemmas with which a school district must constantly deal require some brief elaboration here. "A district must strike a balance between encouraging diversity in delivery and seeking uniformity" (Berman and McLaughlin, 1979, p. 63). In terms of teaching, for example, a key question concerns whether or not a district supports the belief that effective teaching results when teachers are free to develop a unique heuristic style, or, whether or not the promotion of

individuality causes concern about teaching quality, standards and performance objectives.

The second dilemma is captured in the question: "Should there be a high degree of centralization or a high degree of decentralization" (Berman and McLaughlin, 1979, p. 10)? The promotion of decentralist policies may give schools the freedom they need to adapt to their individual neighbourhoods, but it may prevent the adoption of district-wide innovation policies.

The third dilemma has been called the openness versus closedness dilemma. It can be portrayed with the question: "How can a district protect itself from external political control or from endless conflicting demands that cannot be met, while being responsive and accountable to legitimate forces" (Berman and McLaughlin, 1979, p. 10)?

The fourth dilemma concerns delivery goals versus nondelivery goals. Districts are continually setting and seeking multiple goals; delivery, bureaucratic and political. Conflicts arise, choices need to be made, and some goals will be given priority over others.

The fifth dilemma centers upon the notions of stability and change. All functioning systems require both stability and change. A school system must perform its various tasks in a regular and predictable manner and yet it must respond to new technical knowledge and to changes in the community it serves.

As Berman and McLaughlin (1979) investigated the characteristic ways school districts responded to these five basic dilemmas they devised descriptions of two ideal types

which "do not fully or exactly capture the complex realities that constitute school district life" (p. 63), but which show how types of control dynamics create different incentives and responses in a system. These ideal states are contrasted in summary form in Figure 5-3.

Even though the two ideal characteristic states of school district development represent theoretical extremes, some comparisons between these ideal states and the school system of British Columbia are possible. It would appear that the incentives, controls, behaviours and attitudes which characterize many of the school districts in the Province are far closer to Berman and McLaughlin's (1979) conceptions of the state of maintenance than they are to the state of development.

It was pointed out earlier that diversity, clearly evident in Cameron's (1945) value scheme, upon which the current school district system was built, has, over time, been replaced with practices which exemplify the values of uniformity and conformity. The last forty years, and particularly the last three years, have seen the triumph of the top-down view of local government, greater centralization of decision- and policy-making powers, a significant decline in lay control and citizen participation, and a long series of victories for the society perspective on the goals of education. These factors have tended to encourage the development of a standardized provincial curriculum which makes only minor concessions to locally-developed courses, top-down authority relationships where the needs of the bureaucracies to protect themselves

FIGURE 5-3

**BERMAN AND MCLAUGHLIN'S CONCEPTIONS\* OF TWO THEORETICAL STATES: MAINTENANCE & DEVELOPMENT**

<b>MAINTENANCE</b>	<b>DEVELOPMENT</b>
<p>1) <b>Delivery uniformity.</b> Routinized procedures in the area of personnel, curriculum budgeting and delivery operations embody incentives and expectations that discourage diversity in teaching practices.</p>	<p>1) <b>Delivery diversity.</b> The developed system encourages delivery diversity because it believes diversity is both inevitable and desirable. High quality delivery is supported, expected and monitored.</p>
<p>2) <b>Loose coupling.</b> Schools are isolated from each other and from the central administration. The organizational patterns that define this structure are a lack of trust, partitioned decision-making structure and a top-down style of authority relationships. Feedback between administrative levels consists of symbolic reporting and reinforces the status quo.</p>	<p>2) <b>Integrated loose coupling.</b> The developed district deals with system integration by dispersing decision-making power throughout the system rather than husbanding it at the center or partitioning it into segmented fiefdoms. Instead of attempting to impose bureaucratic controls, the system seeks integration by a) delegating authority downward within a central framework that has representative policy-making committees and emphasizes shared responsibility b) instituting feedback channels that allow central coordination, monitoring and support c) establishing improved educational delivery as a common system purpose and d) promoting mutual trust.</p>
<p>3) <b>Subordination of delivery concerns.</b> The absence of a sense of unified concern with delivery arising out of insularity and mistrust between administrative levels. The major goal of the system is to protect itself from internal conflicts and external threats in order to maintain the status quo.</p>	<p>3) <b>Primacy of delivery concerns.</b> The priority is delivery. Political and bureaucratic activities are seen as means to advance delivery concerns.</p>
<p>4) <b>Closed boundary.</b> In order to protect itself the system is sealed off from outside pressures and influences. Administrators tend to be reactive. Pressures from outside are ignored, absorbed, coopted or isolated. When other defenses fail, changes are added incrementally to the system without replacing existing core processes.</p>	<p>4) <b>Boundary openness.</b> The development system looks outward, is proactive toward its community and the larger environment. It tries to strike a balance between attempting to maximize the support and the contributions of a broad base of the community and to retain its autonomy. This balance recognizes the openness and interdependence of the district and the local community.</p>
<p>5) <b>Stability as constraint.</b> The incentives and control structures in the system discourage risk-taking. There is a reliance on formal authority relations, routinized behaviour, control, uniformity and "safe" reactions to pressures. Significant change is feared.</p>	<p>5) <b>Institutionalized change.</b> A continuous process of significant change is viewed as desirable and essential cultural norms--e.g. risk-taking and professionalism--support an atmosphere and an expectation for change at all levels. In this context, change is not destabilizing because change efforts are undertaken only if a consensus over needs (not means) can be formed, and the new practices are routinized into everyday operations and replace rather than compete with or simply disrupt old practices.</p>

\*These summaries are not generally in the words of the authors.



oftentimes seem to take precedence over the delivery of services to students and communities, and where risk-taking is discouraged.

Zenke (1975) has conceptualized the internal organization of a school district, designed to encourage and support diversity, which represents in concrete terms many of the incentives and controls that Berman and McLaughlin (1979) identify in school systems in what they call a state of "development." Zenke (1975) holds that

typically the organization of school systems has been pyramidal in form, with the school board at the top and the teachers and students at the bottom (p. 54).

Zenke (1975) proposes that the pyramid be inverted so that the students would be placed at the top. Then,

immediately below the students in the inverted pyramid would be the teachers, then the principals, and somewhere below the principal level would be the central office staff (p. 54).

Further, Zenke (1975) has determined that in such an organizational design perspective

one of the best things that principals could do would be to get out of the way of teachers and let them teach, and so on down throughout the organizational design with those individuals in positions at lower levels getting out of the way of those at the levels above them, freeing them to accomplish the tasks for which they were employed (p. 54).

In spite of the theoretical value systems examined above which have called for increased emphasis on the value, diversity, it appears that diversity has not been valued much in practice in the school district system in British Columbia. The case was made here that structural reform--such as the

reorganization of school district units--may not be a way to achieve diversity in school district operations. It is suggested, however, that the value, diversity, may be emphasized or de-emphasized in a school district system as a result of incentives and controls built into the organizational structures, inside school districts, and perhaps in the province, which encourage or discourage adaptation and change.

CHAPTER SIX: REVIEW

The purpose of this paper is to provide policy-makers at the local, provincial or state levels, as well as other stake-holding audiences, with an analysis of issues which impact upon value questions that have arisen in school district reorganization proposals, studies and policies in a number of jurisdictions on this continent. In general, special attention is given to studies which focus on British Columbia. This paper examines three values--equality, efficiency and diversity--which have reflected in the past, and continue to reflect, the major organizing values in the design and structure of school systems in North America. It appears that a long-standing and widely-accepted assumption of researchers and policy-makers is that the values of equality, efficiency and diversity are competing values in the sense that any plan to increase the emphasis on one of the values will necessarily detract from one or both of the others. This analysis argues that these values are not necessarily competing values, but, rather, coexisting values which may sometimes be mutually-sustaining and which ought to be emphasized concurrently in the design and organization of school districts. Additionally, it is suggested that the optimal policy options for school district reorganization are those in which increased levels of equality, efficiency and diversity are joint products. Other policy options which should be considered are those in which increased levels of one or two

of the values are sought in such a way that the status quo with regard to one or both of the others is not damaged.

The "Discussion" sections which follow each of the major chapters draw upon a variety of research types and areas and suggest how the three values, equality, efficiency and diversity can be considered mutually-sustaining values. The content of these "Discussion" sections is summarized briefly in this chapter. As well, this chapter offers suggestions to the Provincial Government and to school districts about possible ways in which the three values (equality, efficiency and diversity) might be maximized concurrently in school district operations.

### REVIEW OF DISCUSSION SECTIONS

The "Discussion" section at the end of Chapter Three explored the thesis that school districts will pursue quality and hence equality goals to the extent that internal and external structures allow and encourage them to do so. A number of studies were examined which emphasize process approaches derived from qualitative research methodologies. These studies suggest that the behavior of key actors at the school level (principals, teachers and students) and at the district level (district administrators, principals, teachers and students) is sensitive to the institutional rules, norms and practices which combine to create a characteristic "ethos" or climate which can promote or inhibit student achievement and other student outcomes in a school or a school district.

It is argued in this section that central government policies, particularly financial distribution policies, may be a major influence on the educational environment or climate in a province or a state. These policies may ultimately influence student performance in an indirect fashion by providing incentives and controls which affect the behavior of key actors at the various levels throughout the school system hierarchy.

Additionally, the "Discussion" section at the end of Chapter Three draws upon school finance research and school effectiveness research to explore linkages between the concept, equality of opportunity, and (1) efficiency and (2) diversity, or local control.

Equality of opportunity goals and efficiency objectives can be mutually-sustaining when, without the infusion of additional resources, changes in programs and/or practices result in the improved delivery of services to students and/or improved student outcomes in all schools or districts, but particularly in those with poor or mediocre track records in terms of student outcomes.

The linkages between the concept, equality of opportunity, and diversity, or local control, were identified in the effective schools research. Effective schools research suggests that the adoption of innovations which improve effectiveness at the school and district levels requires attention to the delicate balance between leadership and autonomy. If this conclusion holds true at the provincial level, then provincial policy-makers would do well to consider

policies which provide incentives for school districts to adopt innovations arising out of effectiveness studies, but which also allow local districts the discretion they require to determine which processes and practices make the most sense in their particular schools and communities.

The "Discussion" section which concludes Chapter Four explores the thesis that school districts will pursue efficiency goals to the extent that internal and external structures provide the incentives and controls which allow and encourage them to do so. In this section the linkages between efficiency and diversity values are discussed. Focusing on the B.C. school system, it is argued that highly centralized systems which regulate both goals and means (programs and budgets) can produce inefficiencies, even though they may appear to be able to control and/or reduce spending levels. Since communities differ in terms of their needs and preferences with regard to schooling, least-cost production methods may also differ. Thus, if both programs and budgets are too rigidly controlled, then school districts and schools may not be able to consider alternate ways to utilize resources to achieve their goals. However, it was also pointed out that local control with regard to program decisions can also produce inefficiencies if local districts are not directly accountable to local taxpayers for their budget decisions. It is suggested that the incentives for school districts to employ least-cost production methods can be provided by central government policies which allow for sufficient local program autonomy, but which also require a

significant degree of local revenue autonomy. Thus, greater levels of program autonomy, if coupled with greater degrees of revenue autonomy, should result in increased efficiency. In this sense, diversity and efficiency can be regarded as mutually-sustaining values.

The "Discussion" section at the end of Chapter Five explored the thesis that school districts are effective in meeting the needs of the communities within their boundaries to the extent that they are able to adapt to the needs of those communities and to changes in those communities over time. Change has been sought in the school systems of British Columbia mainly through the institution of structural reforms, such as school district boundary revision. These changes have arisen out of an enduring emphasis on the values, equality and efficiency, at the expense of the value, diversity. It is apparent, however, that the school system in British Columbia exemplifies the values of uniformity and conformity. In British Columbia the long series of victories for the society perspective in education -- represented in the move to fewer and larger districts; increased centralization; the gradual transfer of power from elected to appointed officials; the lack of citizen participation in decision- and policy-making at the local level; the standardization of curricula; and top-down authority relationships exemplify the state of maintenance as Berman and McLaughlin (1979) have conceived it.

TOWARD MAXIMIZING EQUALITY, EFFICIENCY AND DIVERSITY CONCURRENTLY  
IN SCHOOL DISTRICT OPERATIONS: SUGGESTIONS FOR THE PROVINCIAL  
GOVERNMENT

Neither the Provincial Government nor the school districts in British Columbia, working in isolation from one another, is likely to be highly successful in maximizing all three values (equality, efficiency and diversity) simultaneously in school district operations. Clearly, a greater awareness of value issues at all levels in the school system hierarchy, together with a desire to increase the emphasis on one or two of the values without damaging the status quo with regard to one or both of the others, is a prerequisite for change. Leadership that is concerned and knowledgeable about values and that seeks to alter the value climate in the school system of B.C. is needed at all levels.

If all three values are to be maximized concurrently in the B.C. school system, then the Province must pay greater attention to the effects of its policies on the behaviors of key actors at all levels. For example, the current education finance policies of the Province which link programs to funding have dampened the rate of increase in school board spending, but may well have decreased the efficiency of school district operations by having created incentives for local school officials to focus on satisfying the program requirements of the Province rather than on creating or adapting programs to meet the needs (and changing needs) of the communities they serve. While it is the responsibility of the Province to



determine provincial spending priorities, in the interest of improved efficiency it should be the responsibility of school boards (and/or schools) to determine how resources might best be utilized to meet local needs. School boards (and school-based personnel) should be given the latitude to determine least-cost production methods locally. Further, if school boards had to raise a significant portion of their operating budgets locally, then school officials would be provided with incentives to garner and maintain the support of the communities they serve. As well, the electorate would have a more direct and visible stake in determining the degree to which it chooses to support the schools. If the residents in school districts contributed directly to local school operations then they would be provided with an incentive to become involved in school affairs, and an incentive to demand that local officials, elected and appointed, be more accountable for their decisions.

Provincial education finance policies, structured to allow at least a portion of each school board's budget to be raised through local taxation, must take into account the fact that property-rich districts will be able to raise additional funds for schools with less burden on individual taxpayers than will property-poor districts. In order to equalize tax burdens, Provincial education finance policies should be structured in such a way that, for the portion of school taxes raised locally, a unit of taxpayer effort produces similar results in all districts.

It is evident that provincial finance policies, as they are currently structured, tend to encourage inefficiency, uniformity and conformity rather than efficiency, diversity and innovation. To encourage greater efficiency and diversity, a system of incentive grants might be devised to assist local districts to involve their communities in the task of devising and implementing experimental programs and practices to deliver improved services to students in cost-efficient ways. An improved research- and information-dissemination system might also be devised so that districts can be made aware of successful innovations which might be adapted to their schools and/or districts.

Finally, as was noted in Chapter Two, the history of the administration of education in British Columbia has been highlighted by school district boundary changes which have always resulted in fewer and larger school districts on the grounds that "bigger is better and cheaper". Since the legal authority to alter school district boundaries rests with the Province, it may be worthwhile for the government to commission a thorough study over a number of years to determine whether or not its past decisions, made largely on the basis of conventional wisdom, are workable in terms of maximizing the values of equality, efficiency and diversity concurrently in school district operations.

Coleman (1985) found that in British Columbia "the unusually successful districts are rather small" (p. 33). "Successful districts" are those in which students, on average,

obtained high scores, relative to students in other districts, between 1981 and 1984, on "batteries of tests administered by the Ministry" (p. 3). This finding led Coleman (1985) to assert that "size, beyond a modest level, might well be a handicap to effectiveness" (p. 33). It may be that many districts have grown too large to be able to obtain sufficient levels of public input and/or to change and adapt to the communities they serve in a focused manner.

**TOWARD MAXIMIZING EQUALITY, EFFICIENCY AND DIVERSITY CONCURRENTLY IN SCHOOL DISTRICT OPERATIONS: SUGGESTIONS FOR SCHOOL DISTRICTS**

If the Province's education policies, and particularly its education finance policies, are restructured so that a climate is created in the Province that provides incentives to school districts to work toward the goal of maximizing all three values (equality, efficiency and diversity) simultaneously, then school districts will arguably stand a better chance of achieving that goal. However, even if the climate created by the incentives present in current provincial policies remains largely unaltered, individual school districts would still do well to seek to maximize these three values concurrently in local policies and practices.

One of the most frequently cited and often emphasized elements in the abundant research on effective schools is leadership. Since the appointment of school principals is the responsibility of school districts, then the leadership at the

district level can be regarded as an important key to the effective school district. In order to proceed to maximize the values of equality, efficiency and diversity concurrently in a school district, district administrators require knowledge of these value issues and the will to pursue these goals simultaneously. District administrators need to possess the awareness that norms, rules, practices and policies create a climate in a school district which may ultimately affect student outcomes by virtue of its effects on the behaviour of key actors (principals, teachers, students and community members) within the system.

In attempting to maximize the value equality, in school district operations, a school district must emphasize at all times in policy and practice that the prime goal of the organization is the delivery of quality services to students. School based personnel should be given sufficient autonomy to devise a variety of programs specifically designed to meet the differential needs of the students in the communities they serve. This does not mean that for every need which can be identified a special program ought to be devised to answer it. Such a practice would quite likely detract from efficiency objectives. However, given finite quantities of resources, and the overarching goal of supplying quality services to students, school-based personnel, in consultation with district staff and the community, need to be trusted to devise appropriate types of programs for students, to prioritize such program offerings and to be made responsible and accountable

for their delivery. Portions of district budgets should be set aside for program experimentation and in-service training for teachers in order to encourage and maintain high standards of delivery. Further, school-based personnel, as well as district-based personnel and the community, should be made responsible for developing criteria for evaluating proposed and existing school programs.

To maximize the value, efficiency, in school district operations, a school district should devise policies and practices which delegate decision-making authority and responsibility downward throughout the system. Within the inevitable boundaries established by budgets, district-wide goals and student needs, school-based personnel ought to be given sufficient autonomy to decide which instructional approaches make the most sense in their schools. Principals and teachers may be the ones best equipped to determine the program priorities and methods of operation which utilize resources in the most prudent manner, and which best meet the needs of the students concerned. School-based budgeting practices may be appropriate for many districts. Districts which adopt such practices would indicate to school-based personnel, in a concrete way, that they are trusted to make important decisions, and that teachers and principals must share the responsibility for the decisions they make. School-based budgeting policies, providing that they contain incentives which produce efficiency and cause high standards of program delivery to be adopted and/or maintained, may create

opportunities for districts to maximize the values of equality and efficiency in their operations.

School districts can proceed to maximize the value, diversity, by encouraging community participation through decision- and policy-making committees at all levels and by monitoring community attitudes and co-ordinating change efforts. School boards can encourage community participation in decision- and policy-making by establishing citizen advisory committees at the district level. In so doing, school boards could model behaviors they would like to see emulated by the schools. Or, school boards could emphasize the importance of community involvement in schools through policies which require that all schools establish citizen committees and by monitoring and providing feedback to schools and communities on progress made. Community surveys conducted at regular intervals at the district and/or school levels can assist school and district policy-makers in determining community attitudes, goals and needs with regard to schooling. Such measures would provide school districts and schools with the necessary information to adapt programs to the communities they serve and also to make changes in programs as community needs and attitudes change.

#### POSSIBLE DIRECTIONS FOR FURTHER RESEARCH ON VALUE ISSUES

It is hoped that this study has suggested and discussed worthwhile questions and issues about values in school district

reorganization policies, as well as useful ways of looking for potential interdependencies among the three values examined.

This thesis assumes (perhaps incorrectly) that educational policy-makers at the various levels are to some degree aware of, and/or concerned about, the role of basic values in the policy-development process. Perhaps as a preliminary study to this thesis, a questionnaire, a telephone survey, or a series of short personal interviews might have been conducted to determine policy-makers' general levels of knowledge with regard to value questions related to the theme of school district reorganization. In fact, this process could have been used to assist with decisions about the content of this thesis.

With regard to further research related to the value issues discussed in this paper, it may be instructive to sharpen the focus--to zero in on individual school districts in British Columbia, to examine value questions and issues from within. Studies which employ both qualitative and quantitative data--perhaps a number of case studies--and which focus on outliers (districts which appear to be different from others, unusual in some way or ways) may provide some useful insights into school district operations and the behaviors of key actors, their interactions with each other and with the other resources and elements in the system. Such studies might be conducted by teams of graduate students over a number of years.

In order to establish which districts might be studied, key school- and district-based personnel in all districts in

the Province, as well as Ministry of Education officials, could be surveyed. The survey could be used to assist with the identification of districts in British Columbia, for example,

1. where there have been an unusually large number of public complaints (or complaints by personnel) about a perceived lack of equality in terms of service provision.
2. where low SES students achieve higher (or lower) scores on standardized tests when compared to students from similar backgrounds in other districts.
3. where there are an unusually large number of special programs offered in response to the needs of various groups within the school community.
4. which seem to be able to operate quite comfortably within the budgetary guidelines established by the Province.
5. which seem unable to meet the educational needs of the communities they serve with the funds provided by the Province.
6. which employ school-based budgeting procedures to distribute funds from the district level to the school level.
7. which are reputed to employ "unusual" management techniques.
8. in which unusually large numbers of citizens attend school advisory committee meetings, and school board policy development meetings.
9. where there seem to be a large number of complaints about members of the public being "shut out" of school and/or district affairs.
10. where employee morale is reputed to be unusually high (or low).
11. districts where taxpayers seem more (or less) willing to support their schools.
12. where communities generally are reputed to be unusually satisfied or (dissatisfied) with their schools.



A case study approach which examines value issues from within actual school districts in B.C., and which makes use of observation, interview, and survey data, could provide extremely useful "living portraits" for educators and policy-makers depicting how some "unusual" districts operate, how they make decisions, how they respond to problems, how they spend money, how they allocate resources, how well they deliver services to students and how the people inside them interact. The case study research proposed here would act as a window through which educators and policy-makers in one school district would be able to see what their counterparts elsewhere had done or were doing.

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