

PERCEPTIONS OF CHANGE: SUPERINTENDENTS'  
VIEWS OF OKLAHOMA HOUSE BILL 1017

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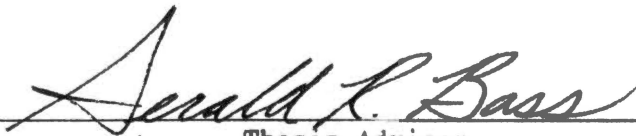
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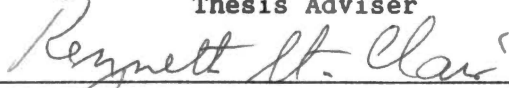
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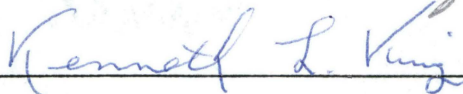
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## PREFACE

Several years ago I began my career in education administration and, as a neophyte administrator, I could not understand why people and organizations were so reluctant to change when it seemed so necessary. It is only now that I am beginning to understand why.

I do not believe that I will ever have all the answers or even be able to support the perfect model for change, but I am grateful now that I can place change-resistant organizations into perspective.

Perhaps through a coincidental matching of personality and interest, but most likely through predestination, I am fascinated with the topics of educational politics, change, and education reform. Consequently, this thesis was born in my heart when I attended the first Task Force 2000 meeting on September 8, 1989.

Without the patience, guidance, and perseverance of Dr. Gerald Bass, this thesis and research project would never have happened. I express my deepest gratitude to him for his positive attitude, words of wisdom, and his friendship. To Dr. Adrienne Hyle, who believed in me, inspired my creativity and, encouraged me to take risks, I am most grateful. Additional thanks go to the friendly encouragement from Dr. Kenneth St. Clair and Dr. Kenneth King, who told me five years ago "you'll be back" - you were right.

Many people are to thank for the completion of this thesis. Without the support and understanding of my family and friends, I



do not know what I would have done. Dad, Mom and Ken, John and Ruth, Karen, Kelli, Kris, and my dear friend, Melanie - thanks.

And last, a special thank you to the most important people in my life for your endless support and love. To my children, Megan and Ryan, who have grown up without me and to my husband, James, who always believed in me - thank you. One last word of thanks goes to my Decision Maker for His strength and uncanny ability to show me the way.

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## CHAPTER I

### INTRODUCTION

Reform is the buzz word of the 1980s and the quest of the 1990s. States all over the nation are seeking education reform this very day. Public attention is now focused on the quality of education. But just how long this interest will sustain itself is unknown. If schools are to take full advantage of the opportunity to improve themselves they must act now for America's resources are not unlimited. Oklahoma leaders have chosen to seize this opportunity. With the recent passage of House Bill (HB) 1017, education reform initiatives are merely waiting implementation.

The education reform movement of today generally is considered to have begun at a White House press conference in April 1983 when, with President Ronald Reagan sharing the podium, the National Commission on Excellence in Education (NCEE) released its report A Nation at Risk The Imperative for Educational Reform. One single paragraph from this powerful document has served as the catalyst for the reform movement.

If an unfriendly foreign power had attempted to impose on America the mediocre educational performance that exists today, we might well have viewed it as an act of war . . . . We have, in effect been committing an act of unthinking, unilateral educational disarmament (National Commission on Excellence in Education, 1983, p. 5).

Viewed as the preamble of "first wave" education reform, those two sentences established the initial tone for the debate over the

direction school reform should take. By the end of that year, the Education Commission of the States had summarized the growing body of reforms.

Hardly a month has passed without the release of a major report by a prestigious group of citizens concerned about the nature of American education. And sprinkled between major releases have been dozens of task force reports, interim studies and articles about school renewal, effective schools, business-related partnerships or ways to meet educational needs of a rapidly changing society (Education Commission of the States, 1983, p. 1).

Passow (1989) observed that this first wave "concentrated on low-cost and high-visibility activities that included rules and regulations, mandates, and requirements designed to toughen up the curriculum and raise standards for teachers and teaching" (p. 9). In short, the first level of these changes focused upon how things looked on the outside (Sergiovanni and Moore, 1989). Between 1983 and 1985, state legislatures enacted more than 700 statutes stipulating what should be taught, and by whom it should be taught. The clear purpose of this mass of legislation and the bureaucratic mandates that followed was to control and to regulate teachers and local schools (Futrell, 1989).

The reaction to this top-down wave of legislation across the nation brought about frustration and resentment from many educators. The mass of regulations imposed by the states did not appropriately authorize teachers, administrators, parents, or school boards to make decisions about changes unique to individual school district settings. Thus, the realization came later that, if education were to serve as deliverer of social and economic improvement, the decisions needed to come from educators, not legislators.

The years of 1986 through 1989 witnessed the release of what can be referred to as the "second wave of reform reports" (Passow, 1989). Included in this group of reports, those of the Holmes Group (1986) and the Carnegie Forum on Education and the Economy (1986) received most notoriety. These reports were primarily concerned with bringing about changes in teachers, their preparation, and the conditions of teaching. This second wave sought to end the educational change imposed from above and to begin to look to local schools, and particularly the teachers, for solutions leading to educational improvement. "The decentralization of substantial authority to the persons closest to the students is essential" (Sizer, 1986, p. 10).

The second wave called for reform efforts that brought together teachers, principals, superintendents, school boards, parents, and business and community leaders in collaborative efforts to renew and improve their schools. The local school was seen as the focus of reform initiatives that would be tailored to local needs. And it was during this period that equity began to reclaim a central position alongside excellence in discussions of school reform (Putrell, 1989, p. 3).

While the nature and substance of the second wave of reform have been perceived differently by various groups, the mere fact that second wave reform efforts are currently being initiated is indication that the previous goals of the reformers have not been fully attained and that, if school reform efforts are in fact to be implemented, reform by legislation, regulation, and mandate are not sufficient (Passow, 1989).

Oklahoma's HB 1017 has evolved from efforts surrounding the controversial publicity of the many national documents. Through the collaborative work of legislators, educators, and business leaders alike, the second wave reform efforts are now underway in this state. Surprisingly, the comprehensiveness of, and swift committee action on

the bill contradicted the traditional images of slow-moving political systems. Based upon research on the diffusion of policy innovations, McDonnell and Fuhrman (1985) suggested four different explanations which might be applied to this seeming deviation from the normal routine of policymaking.

1. Some state governments are simply more innovative than others, and historically have always displayed greater tendency to adopt new policy approaches.
2. Innovation results from either a crisis or a widespread perception that the current system is not working well.
3. Innovation results from organizational fiscal slack. Organizations with extra money can afford to experiment with new approaches.
4. Innovations are more likely to occur when opposition to them is relatively weak (pp. 50-53).

The journey of HB 1017 through the legislature was challenging as the opposition to change was voiced by many. Because the implementation of HB 1017 is far from complete, its effects will not be known for quite some time. Among issues that can be measured now are the nature and degree of support or opposition to change evidenced by public school superintendents.

Zaltman, Florio, and Sikorski (1977) asserted that the motivating forces for institutional change in education can usually be traced to either of two sources: demands for the schools to respond to the socialization needs of society or use of the schools to solve social problems. While Oklahoma may be responding to one or both of these forces, the degree of opposition may affect the actual success of these reforms.

Havelock and Havelock (1973) identified a number of barriers to



change encountered by school district superintendents in very successful, self-reported change efforts. These 18 barriers to change were listed in order of their importance.

1. Confusion among staff about the purpose of the innovation
2. Unwillingness of teachers and school personnel to change or listen to new ideas
3. Shortage of funds allocated for the innovations
4. Staff's lack of precise information about the innovation
5. Frustration and difficulty encountered by teachers and/or relevant staff in trying to adopt
6. Lack of communication among staff
7. Inadequacy of school plant, facilities, equipment or supplies
8. Shortage of qualified personnel
9. Feeling by teachers and staff that the innovation would have little benefit for them
10. Rigidity of school system structure and bureaucracy
11. Lack of communication between staff and students
12. Lack of coordination and teamwork within the school system
13. Disorganization of the planning and implementation efforts
14. Lack of adequate contacts with outside resource groups (e.g., universities, consultants, labs, etc.)
15. Absence of a concerted campaign to put the new ideas across
16. Frustration and difficulty encountered by the students during the adoption process
17. Lack of contact with other school systems who had considered the same innovation

18. Unwillingness of resource groups to help us revise or adapt (p. 153).

While there are many courses of resistance to change, "general cultural barriers and cultural ethnocentrism, social and organizational barriers, organizational rigidity, psychological barriers, and the nature of innovation, may all cause resistance to change" (Zaltman et al., 1977, p. 47). However, that resistance to change is a necessary and healthy phenomenon. Resistance can provide useful information about organizational resources, constraints, attitudes, values, norms, and external relationships which can help the change planner in selecting strategies (Zaltman et al., 1977).

#### Statement of the Problem

The battle involved in the passage of HB 1017 was controversial and exhausting. Many educators were surprised to learn that not all superintendents supported the passage of this massive education reform bill. The degree of support for and opposition to HB 1017 by superintendents is unclear. In addition, the variables which influence the decisions of public school superintendents in regard to change and education reform are unknown.

#### The Purpose of the Study

Specifically, this study focused on Oklahoma superintendents' perceptions of change and the education reforms in Oklahoma as proposed by HB 1017. Through the study of these current change efforts in Oklahoma, these data may assist educators in planning, implementing, and evaluating future change and reform processes. The following

questions guided this study:

1. To what degree do school superintendents support or oppose the reform efforts in Oklahoma?
2. How do superintendents assess the potential impact and effectiveness of change and reform?
3. Are there regional differences regarding support or opposition to change and reform efforts?
4. Does the amount of experience affect the manner in which superintendents perceive education change and reform?
5. Does the size of the school district have any bearing on whether superintendents support or oppose change?
6. Are there instances in which change or reform efforts are viewed differently by superintendents and their constituencies? If so, how do superintendents deal with the inherent conflict?

#### Significance of the Study

In educational organizations change occurs slowly and deliberately. School administrators are often criticized for being among the most conservative professional groups, particularly in the face of change. What is usually overlooked is that these administrators may have more reason to resist change than most other professionals as they are more likely to be subject to lay control and public interest and involvement.

The data gathered in this study may contribute to future strategy development by change planners. Change-oriented individuals and organizations must be able to access research produced by others in order to learn from past experiences. While every district and state

may be unique to its own needs and wants, the knowledge gained from both successes and failures is necessary and vital for a variety of possible implications. Formal models of change are available, but one must have the practical experience and knowledge in order to implement change within these models.

As schools continue the long and tedious process of reform, necessary data must be gathered to assist in the change process. However, the generalizations and findings from Oklahoma's education reform movement of the 1990s is only the tip of the iceberg in knowledge production and use.

#### Limitations of the Study

1. The data gathered through this study reflected the reported perceptions of individual public school superintendents. Subjective questions would allow for opinion and judgment.

2. This study was limited to certified public school superintendents employed in Oklahoma during the 1990-1991 school year, as identified by the Oklahoma State Department of Education.

3. This study was limited to Oklahoma independent school districts. No personnel from private or parochial schools were to be involved in the data collection.

#### Assumptions

This study was based upon the following assumptions:

1. Oklahoma public school superintendents involved in this study were familiar with the content and language of HB 1017.

2. Oklahoma public school superintendents have participated in some degree of change within their respective school districts.

#### Definition of Terms

Independent School Districts - Independent school districts in Oklahoma are those districts which "shall have maintained during the previous year a school offering high school subjects fully accredited by the State Board of Education" (School Laws of Oklahoma 7--5-102).

(Planned) Change - Planned change occurs "when decisions are derived mutually and deliberately with an equal balance of power between change agent and client system" (Bennis, 1966, p. 12).

Resistance - Any conduct that serves to maintain the status quo in the face of pressure to alter the status quo (Zaltman and Duncan, 1977).

Successful School Improvement - Successful school improvement is the "stable, built-in, widespread use of a well-designed innovation that has a positive impact on students and teachers" (Huberman and Miles, 1984, p. 253).

## CHAPTER II

### REVIEW OF THE LITERATURE

This chapter is presented in two sections, theory and practice. The theory segment contains a summary of the literature on the change process itself, change theory, the meaning of change, and strategy selection for change. Following the theory section is a historical review of education reform, both in America and in the State of Oklahoma.

In brief, the literature suggests that the complexity of change can be better understood by familiarity with the various theories and practices of educational change. The literature further suggests that through an understanding of the disciplines and perspectives from which change emerges, greater clarity is given to this often confusing process.

#### Understanding the Change Process

This section includes a brief review of the literature on the process of change followed by four different types of change theories. The literature presented on the change process suggests that while change is actually a tapestry of concepts from a number of disciplines, it is often perceived as logical, rational, and separate.

Baldrige and Deal (1975) maintained that there were at least

three things needed to understand the change process in educational organizations:

a comprehensive organizational perspective, that is, an understanding of crucial organizational subsystems and processes involved in innovation; familiarity with strategies that can be used to cause and support educational changes, such as leadership dynamics, the role of change agents, the dynamics of organizational politics, and the use of program evaluation processes; and practical experience with the dynamics of educational change, either from actually administering a changing institution or from gaining vicarious experience through case studies of actual attempts to change educational organizations (pp. 1-2).

Morrish (1976) stated that when studying the process of change, a large number of separate disciplines should be taken into account for a full understanding of the total problem. Just as education itself is entwined with a number of disciplines such as philosophy, psychology, sociology, and history, so an analysis of the process of change requires some understanding of the way in which change is viewed in a great variety of disciplines concerned with social change. Morrish included examples from social anthropology (a study of change arising from contact between cultures), sociology (innovations such as cooperative activities), rural sociology (the effect of the spread of new farming practices and materials), and social psychology (the problems involved in the acceptance of change in assimilation, accommodation, and socialization). Morrish stated further that "no single, elaborated theory of social change can be or has been devised to link the multiplicity of different elements suggested by this interdisciplinary approach" (p. 18).

Huberman (1973) argued that, in education, interdisciplinary groups of specialists had been unable to find "common language, common methods of research and common perceptions" (p. 3) which would permit

them to converge on any particular problem. Morrish (1976) agreed, contending that one of the drawbacks of American literature on innovation in education is that the language used is often technical and jargonistic. Other drawbacks include the tendency to look at change as an industrial process and as a logical and rational development from theory to practice; the lack of emphasis given to types of resistance to change; and a tendency to concentrate upon the behavioral aspects of change in roles and interpersonal relationships. In addition, Morrish argued that there is too much emphasis placed upon the importance of rewards and reinforcement of new habits in effecting change with little emphasis placed on the importance of historical, political, and social contexts in which all innovations operate.

Bolman and Deal (1984) explained that there are four different lenses through which organizations can be viewed. By employing all four conceptual lenses (individual, structural, political, and symbolic), different aspects of change in organizations can be focused into clear images. The images help to capture the dynamic interplay among the various elements of any organization in the process of change.

### Individual Theories of Change

In the literature of organizational change in American schools, there are two perspectives which have received considerable attention (Deal, 1986). The first perspective is founded in psychology and social psychology.

These disciplines focus attention on individuals and small groups in organizations . . . Attitudes, beliefs, skills, and norms are [perceived to be] the catalysts



for new directions [as well as the barriers to change within the organization itself] (Deal, 1986, p. 116).

The individual perspective emphasizes organizational training which promotes T-groups, sensitivity sessions, group problem solving, and training to provide new skills, understanding, attitudes, and norms. The individual perspective has been, and continues to be, influential in current organizational structures.

Goodlad (1976) maintained that the individual theory of change is characterized by a more self-determining role on the part of the individual. It implies that real change is self-imposed; that is, no one can be forced to change without the consent or the desire to do so. He further suggested that there are many models of change which have been developed from both the individual and the structural perspectives.

### Structural Theories of Change

The second perspective is focused on the conventional side of schools as organizational settings. Goodlad (1976) maintained that, within the structural theory of change, someone with authority of knowledge, or power of authority, influences the changes of an organization. Deal (1986) asserted that sociology and systems theory emphasize the traits of these larger social systems. The structural function of roles, goals, and linkages is directly associated with change.

Organizational characteristics (patterns of the social setting) become the primary targets of change as a direct strategy for improvement. Formal patterns also provide indirect support for changes in other areas. Efforts to establish and clarify goals, pinpoint accountability, increase specialization, promote collaboration, alter roles and relationships, increase

problem-solving capacity, or provide formal incentives are guided by a structural logic of change. The perspective emphasizes formal patterns and processes, both as levers for change and as reasons why initiatives succeed or fail. The [effects of] the approach are visible in the literature, in policy, and in the way consultants or practitioners try to change or to improve schools as organizations (pp. 116-117).

While individual and structural theories are helpful in understanding school change and improvement, Deal (1986) noted that, below the surface of these theories, it is necessary to understand how people and organizations work.

The assumptions of purpose, purposeful action, reasonableness, and certainty are the primary virtues of the individual and structural approaches . . . [At the same time however,] the assumptions are also restricting blinders that leave powerful, less rational forces unidentified and unexamined (p. 117).

### Political Theories of Change

Wirt and Kirst (1989) claimed that schools have traditionally made their claim as being "apolitical," having nothing to do with politics. Perhaps that is why the politics of change have not received the attention shown the previous two perspectives. The volume of political ideas and strategies has not matched the role that politics play in changing or neutralizing changes in schools. Wirt and Kirst maintained that a tremendous amount of concern over the political agenda of the 1980s has resulted in greater emphasis on this perspective.

In explaining the critical role of politics in education, Spring (1988, p. 38) argued that "power and money are at the heart of most conflicts within the educational establishment." Deal (1986) also maintained that people enjoy their stature and power in organizations.

Even those who have neither [stature nor power] relish the time that they will. People also have self-interests

they wish to protect. When their interests are threatened, they form coalitions with others. Struggles among coalitions decide who will prevail in an arena of combative conflict. In the struggle the champions of the status quo usually emerge victorious while the agents of change will lick their wounds and wonder why they lost (Deal, 1986, p. 118).

This political approach is meshed with rational assumptions such as the supposition that interests can be identified, that power can directly influence outcomes, and that conflicts will decide winners and losers. Change will always have its winners and losers, its contests and conflicts, and its exchange of power. Understanding the theories of political change will thus enable one to explain the variance that others see as error or confusion.

Wirt and Kirst (1989) claimed that political theory is cyclical with periods of interest followed by periods of disinterest. While Deal (1986) gave credence to the political theory as a viable explanation of organizational change, he maintained, however, that this particular theory was better supported when viewed as a supplement to other change theories.

### Symbolic Theories of Change

There are several perspectives on the symbolic aspects of change. Meyer and Rowan (1976), in their institutional theory of organizations, perceived that change is sought by individuals outside of the organization rather than by those within. In order to maintain the support and faith of those outside the organization,

organizations outwardly engage in the ceremony of changing while in actuality the organizational members have neither the intention nor the hope that core features or processes will emerge differently. The ceremony is thus a dance of legitimacy played to an outside audience, rather than a real strategy of change (p. 16).

Berman and McLaughlin (1978) maintained that the purpose of innovation is to serve the purely bureaucratic objective of making the school district appear up-to-date and progressive in the eyes of the community. Outside pressure from powerful individuals, formal groups, or other segments of the community may make it necessary to appease those audiences when, in actuality, the majority of interests in the district hold great value in current practice.

Deal (1986) maintained that another symbolic interpretation of change involves the role of culture in organizations.

Culture is an evolving human intervention that shapes behavior and gives meaning to any social collective. Core values define the essential character of the organization while heroes and heroines embody and represent values, providing role models and symbols of virtue. Rituals enact the values, binding people together, providing reassurance, and reinforcing basic understanding and beliefs. An informal network of gatekeepers, storytellers, gossips, spies, and whisperers conspires to keep the culture strong and stable. Where the elements of culture are consistent and mutually reinforcing, productivity, continuity, morale, and confidence are assured as long as the culture fits the requirements posed by the external environment (p. 120).

Sarason (1982) stressed the importance of understanding culture and how it relates to change theory. He emphasized the importance of knowing and understanding the organization's culture through practical experience and pointed out that simple familiarization with change theory is of little value. It is through an understanding of the organization's culture that goals and actions may be determined insofar as what is correct for that particular organization. "Theory [thus] emerges from and continues to reflect practice in the setting" (Sarason, 1982, p. 33). According to Sarason, through the

understanding of the behavior of culture, the meaning and direction of change from this perspective becomes much clearer.

### Change and Innovation

Through the review of the change literature, clear differences in the meaning(s) of change and innovation became evident. A brief description of these definitions is included in this portion of the chapter.

Miles (1984) distinguished between change and innovation by pointing out that innovation is

clearly more planned, deliberate, routinized, and willed than change, which tends to be spontaneous. General change on the other hand, is a long-term process, but it is one which requires continual thought and application in terms of ends and means, aims and techniques (pp. 22-23).

Westley (1969) argued that there are three processes of educational innovation. First, innovations tend to occur through the creation of a variety of changes. Some of these are quite small, such as the introduction of a new textbook, while others are more widespread, such as a general improvement in the professional education and training of teachers. While innovations such as these are usually developed slowly, the total effect is a continual improvement in the education system as a whole. The second process of innovation is what Westley called the "grass roots" development of change. The system as a whole is perpetually being infused with new ideas, and it is transforming those which it is prepared to assimilate into some newly conceived form more constant with its own norms and practice. In the third process, changes occur through policy decisions. A central governmental authority decides to adopt a new idea and issues the

necessary regulations and instructions to bring it into effect.

Watson (1967) demonstrated that the majority of educational innovations are introduced in a sporadic, rather than a continuous or rational, manner. One reason given by Watson for this phenomenon is that few people can sustain continuous change. "We are taken up with sudden rational or irrational enthusiasms, but the innovatory aspect wears off and we again reach a steady plateau" (p. 106). Watson suggested that changes are created by pressures from outside the system rather than generated from within and that they occur for reasons of expediency rather than as a result of deliberate planning or as an expression of personal conviction. "Changes are effected in a haphazard way--one here, one there--rather than in any organized manner or design" (p. 107). Because of this, changes tend to be introduced much later than is desirable, lagging rather than leading. They are also inclined to be superficial rather than basic or fundamental in nature. Watson also suggested that "innovations are devised to win praise or promotion for certain individuals rather than to improve the standards of education generally" (p. 108). Fullan (1982) supported this notion of self-opportunism, citing many case-study examples in which one of the main consequences of introducing innovations was career advancement for the sponsor. The actual innovation often failed to be implemented.

In a 1988 survey conducted on the perception of change and change agents in secondary schools, Rasmussen found that changes in high schools were perceived by high school principals as ordinal. The study suggested that change was initiated first by the principals then followed by the superintendent or other central office administrators.

School boards were ranked as third in the sequence of change agents while teachers were thought to be the last to initiate change. The principal was perceived as the primary change agent in all instances except in changing the humanistic side of the organization. In this case, the superintendent or other central office staff were found to be the change agents.

In another study, Burris (1987) surveyed superintendents in the State of Illinois to determine their perceptions of the state's 1985 Reform Act. Burris determined that school superintendents, as a whole, were in agreement regarding their perceptions of the reform measures. Further, there was consistency in the beliefs of superintendents toward various components of the reform act which they perceived to be generally beneficial. Superintendents generally supported the changes brought about as a result of the legislation. Interestingly, the study determined that school size and organizational structure had little effect upon the implementation of the reform components.

### Strategy Selection

Baldrige and Deal (1975) suggested that the selection of an administrative strategy in innovation should reflect what is changing (the process) and what is being changed (the product). Program changes may require one type of strategy while environmental or structural changes may require another. No single change strategy will continually work successfully for each change or innovation. Prior to selecting or devising a particular change strategy, Baldrige and Deal emphasized that attention should be given to some basic consideration in the strategy selection process. Therefore, beyond these general

considerations are more specific characteristics of a good change strategy that provide a set of useful criteria in evaluating the research included in the strategy. Listed below are their seven basic rules for planned change.

- Rule One: A serious assessment of needs is necessary. . . .
- Rule Two: Proposed changes must be relevant to the history of the organization. . . .
- Rule Three: Organizational changes must take the environment into account. . . .
- Rule Four: Serious changes must affect both the organizational structure and individual attitudes. . . .
- Rule Five: Changes must be directed at manipulable factors. . . .
- Rule Six: Changes must be both politically and economically feasible. . . .
- Rule Seven: The changes must be effective in solving the problems that were diagnosed (Baldrige & Deal, 1975, pp. 14-20).

#### Recent History of Education Reform

The following section contains a general overview of recent education reform in America, tracing the roots of this reform movement from the late 1950s into the current issues of the 1990s. Particular emphasis has been placed upon the past 20 years, as it was during this time that the contemporary reform era is said to have been developed.

Passow (1989) emphasized two events in time which perhaps stand out more than any others over the entire era of reform. The first, which set the foundation for education reform, was the alarming message that prevailed among the American public when Russia orbited Sputnik in October of 1957. The second milestone of education reform was the 1983 release of the report A Nation at Risk.

The launching of Sputnik led to national concern over the educational system in America, resulting in the passage of the National



Defense Education Act (NDEA) of 1958 (Passow, 1989). According to Passow, the late 1950s and early 1960s became known as "The Era of Curriculum Innovation," when dozens of federal projects were undertaken to strengthen curricula and teaching, especially in the areas of science, mathematics, and foreign languages.

From 1957 until the mid-1970s, the federal government's role in public K-12 education grew to include funding and control over 66 categorical programs (Mann, 1978). Reforms during this time were diverse in philosophy and program: new curricula in science and mathematics aimed at gifted students; compensatory education for disadvantaged children; ethnic studies courses; programs to eliminate sexual bias in athletics or vocational education; desegregation; bilingual, bicultural programs; performance contracting; Head-Start and Follow-Through programs; open classrooms; team teaching; minimum competency testing; affective education and sensitivity training; creation of alternative schools; legal protection of student rights; management by objectives; education for the handicapped; and experiments in parental choice of education through vouchers. In many cases, extravagant claims were made for the efficacy of the innovations. Yet as soon as one was alleged to have "failed," another panacea appeared on the horizon (Mann, 1978).

Prior to the outpouring of reform reports in the 1970s, educators had only one commission or committee report with which to deal at a time but, since the 1970s, one such report could hardly be digested before another appeared, with most receiving considerable discussion and debate. Passow (1989) stated that the reform reports of the 1970s were generally in agreement on what was wrong with the schools. One of

the common themes was that schools, especially high schools, were unchanging and unresponsive to the changing conditions. Critics claimed that schools did not and could not provide a comprehensive education; served as "social aging vats," prolonging transitional dependence on adults; did not provide effective work experiences; and could not provide adequate citizenship education or education in the arts. The key operant words in the reform literature of the 1970s were electives, options, and alternatives.

Despite the volume of suggested reforms, questions continued to be raised as to whether schools had really changed.

The past 20 years have witnessed a tremendous effort to change and improve the character of public education. In dollars, these efforts may be measured in the billions. Concerning the time, days and hours committed to programs of change may be considered in terms that are astronomical if they are calculable at all. Despite this huge outpouring of human and financial energy, it is hard for a person who even occasionally visits schools to escape the gnawing feeling that things are pretty much the same as they always have been. This is not to say that conditions and what transpires in schools are bad. Nor is it to say that there are not some schools that have not changed radically and in a productive manner. It is simply to suggest that the system seems to have remained relatively stable in the face of tremendous effort to make it different (Blumberg, 1980, pp. 30-31).

The decade of the 1980s will likely be seen as a period of even greater emphasis on education reform than had been the case in either of the preceding decades (Passow, 1989). The reactive efforts that followed the launching of Sputnik cannot be compared to the second mark in time: April of 1983, at which time the National Commission on Excellence in Education released its report entitled A Nation at Risk: The Imperative for Educational Reform. This document ushered in what has since become known as "the year of the educational reform

reports." In its report, the Commission declared that the "educational foundations of our society are presently being eroded by a rising tide of mediocrity that threatens our very future as a nation and as a people" (p. 5). The report listed 13 "educational dimensions at risk," including poor achievement test scores, declines in both enrollment and achievement in science and mathematics courses, the high costs to business and the military for providing remedial and training programs, unacceptable levels of functional illiteracy found among American children and adults, and poor performance of America's students on comparative studies of educational achievement. A Nation at Risk proposed "five new basics" and specified the number of years of English, mathematics, social studies, science, and computer science that should be required at the secondary level.

Though none of the subsequent national reports received the attention that A Nation at Risk did, there were nevertheless national committee reports being issued by various groups with such titles as the National Commission on the Reform of Secondary Education, the Panel on Youth of the President's Science Advisory Committee, the National Panel on High Schools and Adolescent Education, the Phi Delta Kappa Task Force on Compulsory Education and Transitions for Youth, and the National Commission for Manpower Policy. Well over a dozen reform documents were issued between 1982 and 1984. Included were Action for Excellence (1983), Academic Preparation for College (1983), Ernest Boyer's High School (1983), John Goodlad's A Place Called School (1984), Meeting the Need for Quality (Southern Region Education Board, 1983), TheodoreSizer's Horace's Compromise (1984), Mortimer Adler's The Paideia Proposal (1982), and Paul Peterson's Making the

Grade (1983).

In May 1984, the Department of Education released its rebuttal to A Nation at Risk in a 229-page report entitled The Nation Responds: Recent Efforts to Improve Education. This document summarized the reform efforts of states and local districts in response to A Nation at Risk while pointing out the unprecedented activities at the state-level on the part of governors, legislators, and state education departments (Passow, 1986). Examples of state-level reforms as cited in the report included:

- \* Forty-eight [states] are considering new high school graduation requirements; 35 have approved changes
- \* Twenty-one report initiatives to improve textbooks and instructional materials
- \* Eight have approved lengthening the school day; seven, lengthening the school year; and 18 have mandates affecting the time of instruction
- \* Twenty-four are examining master teacher or career ladder programs, and six have begun statewide or pilot programs
- \* Thirteen are considering changes in academic requirements for extracurricular and athletic programs, and five have already adopted more rigorous standards (U. S. Department of Education, 1984, p. 16).

Indeed, reports are still appearing regularly, including a recent 1988 release by The Carnegie Foundation entitled The Condition of Teaching: A State-by-State Analysis.

#### Oklahoma Reforms Since 1980

Over the past decade the State of Oklahoma has, through the legislative process, mandated a variety of educational reforms which have affected the schools in the state. This portion of the chapter contains highlights of the changes that have been made as a result of those reforms.

House Bill 1706

Enacted in 1980, HB 1706 stands out in the minds of educators, legislators and other state leaders as a turning point for reform initiatives in Oklahoma. The provisions of HB 1706 addressed teacher preparation, teacher assistance, and professional growth of educators. The Teacher Education Program of HB 1706 has resulted in better screening of education applicants while providing more field-based experience for undergraduate teacher education students. Another segment of this bill requires teachers and administrators to pass a competency test in each content area or teaching field prior to licensure/certification. The plan has been in effect for all new graduates of teacher education programs since February 1, 1982, with stipulations that, after October 1, 1986, any educator applying for a new teaching credential must pass the appropriate competency test in order to be certified.

The Entry Year Assistance Program, also a part of HB 1706, was implemented in the 1982-1983 school year, with the purpose of improving the quality of teaching in Oklahoma. The provisions of this program require that every beginning teacher be provided with guidance and assistance by a committee consisting of a teacher consultant (who receives a \$500 stipend), a school administrator, and an educator from an institution of higher education. The Entry Year Program spans practically the entire first year of the beginning teacher's employment and mandates at least 75 hours of assistance by the teacher consultant, formal observations by each committee member, and three committee meetings. At the conclusion of the Entry Year Program, each Entry Year Assistance Committee makes a decision to either recommend certification

of that teacher or to require a second year of Entry Year support. Under the second option, the committee decision at the end of the second year must be to either grant or deny certification.

The staff development provisions of HB 1706 stipulated that, beginning in 1980, all teachers and administrators would be required to continue their educational experience beyond initial certification. This bill included the requirement that a committee be formed in each school district to design and provide a staff development program to meet the needs of its local teachers and administrators. Local staff development committees, comprised primarily of teachers, are required to determine the needs of the school district staff. The plans for achieving those needs are then included in a four-year plan which is submitted to the State Board of Education and updated annually. Based on the student enrollment of each district, an appropriated amount of money is distributed to each school district for support of staff development activities.

### Basic Curriculum

Another reform initiative adopted in Oklahoma during the same time period, although not a piece of legislation, was the Curriculum Review Model. The model was developed in 1980 by the State Department of Education for the purpose of strengthening and aligning the core curriculum of local school districts. The step-by-step model suggests five main areas of review: curriculum philosophy, desired student learner outcomes, program evaluation, identification of specific skills and concepts, and program course descriptions. Minimum competency skills by grade level were the result of the statewide curriculum

review. The basic skills listed in the Curriculum Review Model are referred to as "Suggested Learner Outcomes." The Oklahoma Legislature redefined basic skills in 1982 as math, reading, science, social studies, and language arts. Since 1982 local boards of education have been required to annually review their districts' curricula in these subjects (Oklahoma State Department of Education, 1989).

### School Funding Formulas

Initiated in 1978 and completed in 1981, a revision of the two school district funding formulas attempted to provide for more equitable distribution of state funds for schools. The Legislature recognized that the costs of providing educational programs vary with the needs and grade levels of students. At the same time, conditions within different school districts may also vary. Consequently, the Legislature adjusted the pupil weighting categories in order to more equitably distribute money to school districts. In its formation, a transitional funding "floor" for some school districts was created which later became the "hold harmless" funding mechanism (Deering, Shive, Bass, and Pettigrew, 1989).

In addition to the state aid that is distributed to school districts through formula funding, local funding, primarily generated by the ad valorem tax, provides a key source of revenue. However, several problems exist with the ad valorem system (Holmes, 1983). From county to county, there is a substantial variation in property tax assessment practices. Pockets of wealth create disparities among various counties while interdistrict disparities are created when valuable industrial or other property is located within the boundaries

of certain school districts and not in others.

In an effort to reduce the unequal funding disparity that existed among school districts prior to 1980, Parker (1983) supported the idea that a "Common School Fund" be established for the purpose of more evenly distributing wealth to school districts. A Common School Fund was originally authorized by an amendment to the State Constitution in 1913, but legislation to implement that fund had never been adopted by the Legislature. In the compromises that were necessary for passage of the 1981 school finance reform legislation, the Common School Fund was abandoned. However, great strides were made in moving toward fiscal neutrality and vertical equity through the revision of the state funding formulas.

#### Gifted and Talented Students

In the 1981 legislative session, action was taken to provide for additional funding in the school funding formula for the special needs of gifted and talented students throughout the state. School districts were required to establish programs and policies with which to serve identified gifted and talented students by the 1983-1984 school year.

According to recent figures by the State Department of Education, over 38,000 Oklahoma students have been identified as gifted and talented, scoring in the top three percent on a nationally standardized test. Students who excel in creative thinking, visual and performing arts, or specific academic areas are also eligible for identification.

#### Oklahoma School Testing Program

SB 183, the "Education Improvement Act of 1985," established the



requirement that, beginning in 1986, standardized, norm-referenced tests were to be annually administered to all Oklahoma students in grades 3, 7, and 10. Writing assessments for 7th and 10th graders were added to the Oklahoma School Testing program in 1987 and 1988. By 1989, statutes had expanded the norm-referenced testing program to include grades 3, 5, 7, 9, and 11. Also in 1989, a criterion-referenced competency test was added as a requirement for issuance of a high school diploma beginning with the graduating seniors in 1993. Seniors not passing the competency testing requirement would receive a certificate of completion in lieu of the diploma. Results of the competency tests are to be used at the local level to prescribe skill reinforcement and/or remediation for individual students. Results of all tests are to be used in establishing mandated school improvement plans. In addition, test results are published for public scrutiny (Oklahoma State Department of Education, 1989).

#### Kindergarten Screening

Initiated in 1985, and fully implemented in 1986, Oklahoma law requires that all schools provide for the screening of students prior to or during their kindergarten year. School district personnel and/or qualified personnel from the 10 Regional Education Service Centers are trained in and perform the screening for the purpose of determining readiness to do first grade work.

#### Class Size Reduction

The Education Improvement Act of 1985 (HB 1466) created reform

provisions for class size reduction. This bill stated that, through gradual decline, class size numbers should be lowered in grades one through three to 23. However, a 1986 legislative moratorium on class size reduction left the class size requirements in grades one through three at 24. It was not until the 1988 legislative session, that SB 638 again mandated the lowering of maximum class sizes in grades one through three from 24 to 23. However, the bill was vetoed by the governor due to budgetary constraints. As a continued effort, in 1989 the Oklahoma Legislature passed HB 1202 which set the limit at 21 pupils per class for grades one through three. From the 1990-1991 school year forward, class size reduction for kindergarten will decrease the permissible pupil-teacher ratio from 25 in 1989-1990 to 20 by 1993-1994. Financial penalties are mandated for all districts in which classes exceed the permissible size for that grade (Oklahoma State School Boards Association, 1985).

#### Teacher/Administrator Evaluation

Criteria for effective teaching practices were developed in 1985 by the Oklahoma State Department of Education utilizing appropriate research findings. Since then, all Oklahoma school administrators have been required to complete a training program designed to provide them with skills by which they may evaluate teachers according to the effective teaching criteria. At least 5,000 administrators have been trained by the State Department of Education since April, 1986 (Oklahoma State Department of Education, 1989).

### School Improvement Plans

Since 1986, each school district has been required to have a written school improvement plan addressing improvements to be made over a four-year period. The plan is to be reviewed and updated annually by both the local school district and the State Department of Education and must address any problems related to low test scores from the Oklahoma School Testing Program. In addition, improvement plan activities must include an evaluation of the school's instructional programs in the basic skill areas.

### Oklahoma School of Science and Mathematics

Authorized by the Oklahoma Legislature in 1983, the Oklahoma School of Science and Mathematics was created as a full-time residential program for high school juniors and seniors with exceptional ability in math and/or science. After considerable debate on the selection of the administration, location, and logistics of the school itself, the school began operation in Oklahoma City in the fall of 1990. Statutes require that the school staff must also provide regional summer institutes in math and science as a part of the school's outreach program. Also mandated are other enrichment and staff development programs for math and science teachers throughout the State.

### School District Annexation Elections

In 1987, Governor Henry Bellmon signed into law new provisions regarding school district annexation. School district voters may now petition for a school district annexation even if the school board

fails to pass a resolution calling for such an election. This marked a major change in the way in which annexation elections could be authorized since, prior to 1987, annexation elections were dependent upon action by the local school board.

#### Voluntary School Consolidation

As a result of SB 74 in 1989, financial incentives were provided for school districts which voluntarily decided to engage in consolidation or annexation. The additional funding could be used for assistance in purchasing textbooks and supplies, to provide an increased variety of course offerings for students, to assist teachers whose positions would be eliminated, and even to support some costs of needed construction.

#### School Performance Indicators

In 1988, the Legislature passed SB 183, which required the State Board of Education to establish an Oklahoma Educational Indicators Program. Beginning in 1989, the State Board of Education was required to develop and annually publish data from a set of educational quality indicators which allow the comparison of school district and school site outcomes. Indicators are to include test scores, dropout rates, average class sizes, and the percentage of high school graduates continuing to post-secondary education or employment. Analysis of the indicators must take into account school district finances and socioeconomic factors as contextual factors. Schools performing in the lowest one fourth of Oklahoma schools on the Oklahoma School Testing Program must be declared by the State Board to be "academically at

risk" and are then subject to greater state-level evaluation and possible intervention.

#### School District Financial Accounting

As a result of a lengthy piece of legislation adopted in 1988, school districts are converting to a new program cost accounting system in order to provide better identification of the manner in which education dollars are spent. The cost accounting system provides a specific 26-digit coding design in order that all expenditures of public school monies are easily accounted. All districts must begin using the Oklahoma Cost Accounting System by July 1, 1991.

#### AIDS Education

One of the first AIDS prevention education programs in any state was established by the Oklahoma Legislature in 1987 under HB 1476. Information developed by the State Department of Education pertaining to the transmission of AIDS must be presented to all students in grades seven through nine and may be presented in earlier grades.

#### Alcohol and Drug Abuse Prevention

HB 1344 was signed into law by the governor shortly after the AIDS bill was passed in 1987. In accordance with this law, all schools are encouraged to make application for federal Drug Free Schools and Communities funds between 1987 and 1990. Provisions include development of drug and alcohol abuse prevention curriculums through the Oklahoma Alcohol and Drug Abuse Prevention and Life Skills Education Advisory Council.

Health Insurance for School District  
and Vocational Education Personnel

In 1988, legislation combined provisions for health and accident insurance for members of the Oklahoma Teachers' Retirement System with that for all other state employees. All school districts must provide health insurance coverage for employees by July 1, 1991. Districts may elect to participate in either the state coverage or to provide comparable coverage from private insurers or other plans such as that provided by the Oklahoma State School Boards Association.

House Bill 1017

Despite all of the education reforms enacted in Oklahoma in the 1980s, the decade ended with an aggressive effort to pass a massive school reform bill in a special legislative session. Following the regular 1989 session of the Oklahoma Legislature, Governor Henry Bellmon called a special session to convene on August 14, 1989. The purpose of that session was to address the immediate needs and financial concerns of Oklahoma public schools in what Bellmon called "a crisis in Oklahoma's common education system" (Stillwater News Press, 1991). Bellmon's short-lived proposal for action was primarily focused on a statewide tax increase and on teacher pay raises but was soundly defeated, only to be replaced by an alternate proposal by House Speaker Steve Lewis.

After having met with economic and education specialists throughout the summer of 1989, Speaker of the House Steve Lewis on August 16 proposed his "Education: Challenge 2000" reform package to the legislature (House Education Committee, 1990). Included in this

alternate proposal were 10 major reforms. To fund those reforms, the bill included a tax package totaling \$304 million in new revenues for 1990, increasing to about \$598 million by 1995. A major feature was a 1% to 1.5% increase in the effective rate of the state income tax for all Oklahomans. However, Speaker Lewis' proposal also lacked sufficient legislative support for further consideration.

Legislative and executive branch leaders then turned to a committee which had been earlier authorized but not yet appointed. "Task Force 2000" was thus directed to formulate an education reform proposal that would improve the quality of primary and secondary education in the State, along with a funding proposal that would financially support the implementation of the reforms. On August 29, 1989, the appointed members of the Task Force 2000 were announced. Tulsa oilman and attorney George Singer was named as chairman of the 31-member group. Other members of the Task Force included state business leaders, public school superintendents, classroom teachers, and vo-tech representatives.

Over the next two months, Task Force 2000 met at least once each week in order to prepare its report for presentation to the Legislature by the deadline of November 6, 1989. Between September 15, 1989, and October 27, 1989, eight full-day meetings were held and between September 20, 1989, and September 30, 1989, six public hearings were held in various locations throughout the State (House Education Committee, 1990).

The recommendations of the Task Force were introduced by House Speaker Steve Lewis as "the most important legislation we have considered in the past decade" (House Education Committee, 1990,

p. 4). The primary focus of Task Force 2000 was on outcomes, deregulation, accountability, and adequate and equitable resources (House Education Committee Staff, 1990). Within seven legislative days, the legislation had been drafted, introduced, passed through two committees, and debated on the House floor. On November 15, 1989, the House voted 55 to 46 to pass HB 1017, but the 60 to 41 vote on the emergency clause failed to pass that provision by the required two-thirds majority. The emergency clause was considered critical for two reasons: it would put the provisions of the bill into effect immediately following the Governor's signing and any attempt to refer the measure to a popular vote would be made more difficult and could not prevent the bill's immediate implementation.

House and Senate leaders had predicted that a final bill would be approved by Christmas, but the bill became deadlocked in the Senate. On December 18, 1989, Speaker Lewis addressed the members of the House prior to recessing for the Christmas holidays.

We gather here today--a group of men and women who met their responsibility head on. As ill-conceived and poorly executed as the calling of this special session was, we took it seriously and we made it work. And here we are now, one week before Christmas, ready once again to approach the challenge of the future with an open mind. If the problems in education we are seeking to address were easy to solve, they would have been solved long ago. No one said it would be easy and no one guaranteed success. The truth is we are almost there . . . Let's continue to do what we have done up to this point. Let's keep our goal and our vision steadfast. We must work to make Oklahoma the greatest home in the world for our children. We must provide them with the outstanding education they need and deserve (House Education Committee, 1990, p. 3)

Christmas came and went, 1990 arrived, and still no education reform law had been passed.

Reconvening on January 8, 1990, the Oklahoma Senate voted 25 to 23



to pass HB 1017, but the emergency clause failed to get the necessary two-thirds majority of the full Senate and failed by a vote of 33 to 15. The following day, on January 9, 1990, House and Senate conferees were named to begin work on a final version of legislation. Then, on January 29, 1990, the House and Senate conferees approved a compromise version of HB 1017 which included major reforms and a \$230 million tax package. Examples of the various components of the landmark legislation included funding equity, voluntary consolidation, school accountability, incentive pay, revision of teacher tenure, curriculum standards, class size reduction, and teacher salary improvements. On January 31, 1990, the House voted again to approve HB 1017, passing the measure by a margin of 51 to 50. The emergency clause failed again, this time by 66 to 35. Two weeks later, on February 13, 1990, the House leadership finally obtained the necessary votes to approve the emergency clause 68 to 31. That same day, February 13, the Senate approved the bill 25 to 23, but continued to struggle over the emergency clause. When the Senate finally voted on the emergency clause itself, on April 11, the 27 to 20 vote failed the two-thirds requirement.

The educators in the State of Oklahoma, frustrated and angry, protested their discontent through a five-day walkout called by the Oklahoma Education Association for the week of April 15-21. With tremendous public debate about whether or not HB 1017 would ever pass with the emergency clause, the Senate voted on the bill once again on April 19, 1990, passing the basic measure 26 to 19 and passing the much debated emergency clause 32 to 14. Speaker Lewis claimed:

This is a great day for Oklahoma . . . The changes that HB 1017 will make will go a long way toward

preparing Oklahoma for the economic and social challenges of the next decade and the next century . . . Today, Oklahoma stands proud. We have waited a long time for education improvements and adequate funding. Now Oklahoma is in a position to move ahead and face the future head on. The passage of 1017 will improve our quality of life and increase our economic opportunities for years to come. Today, the sun shines brightly on Oklahoma (House Education Committee, 1990, p. 5).

On April 25, 1990, a special ceremony was held, celebrating education reform in Oklahoma. Governor Henry Bellmon signed HB 1017 (The Education Reform and Funding Act of 1990) into law at John Marshall Elementary, an "at-risk" school in Tulsa, Oklahoma. Governor Bellmon referred to the new law as the most important achievement of his entire public service career. This "Celebration of Education" was viewed by many as a new beginning for education reform in the State of Oklahoma. Those who opposed the measure due to the ensuing tax hike, viewed the passage of HB 1017 as a real defeat. Nevertheless, the special session of the 42nd Oklahoma Legislature will probably be viewed by many as one of the most widely publicized and controversial sessions in the history of Oklahoma (Oklahoma State School Boards Association, 1990).

#### Key Reforms from HB 1017

The following section summarizes key provisions that were contained in HB 1017. While the entire scope of HB 1017 reforms is significant, the selected reforms have received considerable attention from both educators and the media. A complete summary of HB 1017 reforms may be found in Appendix A.

### Accreditation

The Oklahoma State Board of Education was charged with the responsibility of ensuring that certain accreditation standards would be required of all public school districts as early as February 1, 1991. Such standards were expected to meet or exceed those of the North Central Association of Colleges and Schools standards which are currently optional but in place for many schools. While the standards were to emphasize an outcome-driven approach, they also could not conflict with current state statutes. The standards were to include criteria for school counselors and require that all high schools meet the accreditation provisions by June 30, 1995. All other levels of education had until June 30, 1999, to meet these minimum standards. State accreditation must be denied or withdrawn from schools which do not meet the accreditation criteria by the specified date(s), and the State Board of Education was authorized to close such schools and reassign students to other accredited schools in the district or to annex the district to one or more other districts so that the children can be educated in an accredited school (House Education Committee Staff, 1990).

### Curriculum

Beginning on July 1, 1990, each public school district is required to submit an annual curriculum evaluation to the State Board of Education, which will use such evaluations for its periodic assessment of the statewide curriculum. The evaluations shall also be made available to a 22-member Oklahoma Curriculum Committee. The Committee

shall make recommendations to the State Board of Education by November 1, 1990, and assist the Board in the implementation of curriculum reforms to the extent that the Board so requests.

The primary purpose of the Oklahoma Curriculum Committee was to determine and prescribe desired levels of competencies for students in the public schools; determine the core curriculum needed to support effective instruction of each competency; determine the curriculum needed to provide the opportunity for every student to become proficient in the use of computer technology; delineate which activities shall be designated as extracurricular; review the future role of the State Textbook Committee and the state-recommended textbook list; investigate more efficient means for integrating nonacademic material; and provide for the teaching of a hands-on career exploration program for students in grades 6 through 10. The curriculum standards were also required to be equivalent to those of the North Central Association. The Committee's curriculum recommendations for high schools were required to ensure that all high school students would have access to course offerings that would enable them to enter a comprehensive university without having to enroll in remediation courses at the university.

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

elementary and secondary levels through the core curriculum. The core curriculum was to be designed to teach the competencies necessary to prepare students for the 12th grade competency testing required by law and for employment or post-secondary education. The curriculum also must provide students with a hands-on career exploration program in cooperation with the vocational-technical schools. The State Board of Education was required to provide an option for high school graduation based upon attainment of desired levels of competencies in lieu of completion of a specified amount of course credits and to adopt a grade promotion system based upon attainment of specified levels of competencies in each area of the core curriculum. Students who have individualized education plans in accordance with P. L. 94-142 were exempted from the promotion requirements (House Education Committee Staff, 1990).

#### Consolidation and Annexation

HB 1017 established a School Consolidation Assistance Fund to assist small school districts in their efforts to consolidate or annex. Under the provisions, school districts may receive funds (up to 80% of the total salary expenditures) to help pay for assistance to school personnel who lose employment due to annexation or consolidation. Persons receiving such severance pay shall also be credited with one year of service for retirement purposes.

The school consolidation plan allows district voters the right to petition for a school consolidation vote even if the local board of education does not consent. In addition, the State Board of Education was authorized to make one-time allocations from school consolidation

assistance funds based upon the combined enrollment and the number of districts jointly annexed or consolidated. The allowable amount of such assistance ranged from \$500 per ADM for two combined districts to \$800 per student for five combined districts (House Education Committee Staff, 1990).

### Kindergarten and Early Childhood

#### Education

Prior to this reform, the age range for compulsory education was from 7 to 18, unless the child had parental and school permission to leave school at the age of 16 or had graduated. HB 1017 lowered the minimum requirement to five years of age. Beginning with the 1991-1992 school year, unless the child has been screened and determined not ready for kindergarten, every five-year-old child will thus be required to attend kindergarten. In addition, the legislation continued a demand that the kindergarten program shall be directed to developmentally appropriate objectives and required that new kindergarten teachers hired after January 1, 1983, have early childhood education certification. Also under this section, school districts were allowed to offer developmentally appropriate four-year-old programs starting with the 1990-1991 school year. Such programs must supplement the Head Start program and be available to all children without regard to socio-economic conditions of the child or family (House Education Committee Staff, 1990).

#### Class Size Reductions

Following an established timeline for gradual decline, maximum

allowable class sizes will be reduced to 20 in grades K-6 and will limit the total number of pupils instructed by a teacher in grades 7-12 to 120 by the 1997-1998 school year. As an additional consideration for class size, school districts must provide a teachers' assistant or volunteer for each class (K-12) with more than 20 pupils when more than 20% of the pupils meet the eligibility criteria for the National School Lunch Act. In addition, the new law stipulated that class sizes shall be calculated by school site as the average daily membership (ADM) divided by the number of instructional staff, excluding special education classes and Chapter 1 teachers at each site.

#### Teacher Salaries and Incentive Pay

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

### Teacher Due Process Act of 1990

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

### Funding Issues

HB 1017 specifically earmarked revenue raised from new taxes for support of the mandated education reforms and created revised school finance formulas which became effective on July 1, 1990. The Office of State Finance was directed to create a separate, identifiable account within the General Revenue Fund to assure that the new revenues are earmarked for common education. Under the old formula, local school districts received foundation aid on the basis of students in average daily attendance (ADM) and salary incentive aid based upon average daily attendance (ADA). Using the new formulas, school districts will receive state appropriations based upon ADM for both foundation and salary incentive aid. The new formulas also provide for essentially the same special education and economically disadvantaged weighting factors in both calculations, as well as providing for the computation of small school district aid based upon either small school size or district sparsity and isolation, whichever is greater. Another feature of the formula is the addition of a grade-level weighting factor for



eligible children in early childhood programs.

While provisions of the bill provided for greater equity in school funding through the state formulas, the improved equity was somewhat contingent upon voter approval of two state questions (constitutional amendments) included in a companion measure to HB 1017. Voter approval would have resulted in the more equitable distribution of ad valorem taxes on public service property and on commercial/industrial property valued at more than \$500,000. In addition, state revenues that had been redistributed to local districts, including gross production taxes, motor vehicle fees, rural electric association taxes, and school land earnings, would have been retained at the state level for distribution through the formulas. Finally, a second state question would have consolidated separate school millage levies into a single 44-mill limit for formula equalization purposes (House Education Committee Staff, 1990). Unfortunately, State Questions 634 and 635 were both defeated in a statewide vote on June 26, 1990.

Never had a piece of legislation gained such attention from the Oklahoma public and the media as did HB 1017. In fact, controversy still exists over the law as anti-tax supporters have rallied together in an effort to stop the increased taxation resulting from HB 1017. An organization called "Stop Taxing Our People" (STOP) formed initially in protest to the bill itself. Petitions were then circulated in the summer of 1990 in an effort to gather the 90,000 signatures needed to call for a referendum election to repeal HB 1017. Despite the gathering of approximately 150,000 signatures, the effort to recall the law by a vote of the people was delayed by yet another coalition, this time a group of concerned citizens committed to quality education in

Oklahoma. The organization called Growth Oklahoma (GO) formed as an opposing force to STOP and has been the catalyst in delaying access to the state ballot. Proponents of both groups are still actively pursuing the goals of their respective organizations. No final conclusion is yet available, as the petition has been under Supreme Court review following hearings during which HB 1017 supporters attacked the validity of many of the petition signatures. STOP also awaits court approval of its initiative calling for a constitutional amendment giving voters a final say regarding any tax increases that failed to get a 75 percent vote of approval in the legislature (Stillwater News Press, January 6, 1991).

The reform initiatives in Oklahoma are reflective of the complex change process and are subject to a great deal of speculation at this time. Through an understanding of the change process, change theory, the meaning of change, and strategy selection for change, a better perspective may be developed in respect to the effectiveness and impact of reforms on the school districts in the State of Oklahoma. Conclusions regarding the effectiveness and impact of many of the reforms that were initiated in HB 1017 will not be known for quite some time, but the degree to which Oklahoma demonstrates its response may be forthcoming in its reception to future reform legislation.

## CHAPTER III

### RESEARCH DESIGN

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

#### Population and Sample

The population for this study consisted of the superintendents of the 450 independent school districts in Oklahoma. Through random selection, 110 superintendents were selected as the sample.

#### Instrumentation

HB 1017 is a massive piece of legislation, with 132 pages and 131 sections. This study was focused on six of the most controversial and important reform measures as identified in interviews with various members of Task Force 2000, the Cooperative Council of Oklahoma School Administration, and the Oklahoma State School Boards Association. School reform issues selected for this study included the following:

1. Voluntary consolidation of schools (VC)
2. Career teacher and tenure process (CTT)
3. Master salary schedules for teachers (MSS)
4. Accreditation standards (AS)

5. Common School Fund for greater financial equity (CSF)

6. Oklahoma Curriculum Committee standards (OCC)

Using a five-point Likert-type scale, the superintendents were asked to rate their responses with "one" corresponding to the most positive response and "five" being the most negative response as shown below.

1 - Totally Support/Strongly Agree

2 - Somewhat Support/Agree

3 - No Opinion/Undecided

4 - Somewhat Opposed/Disagree

5 - Definitely Opposed/Strongly Disagree

Prior to the distribution of questionnaires to the subject superintendents, a pilot study was conducted in order to examine the reliability and validity of the instrument. A panel of public school administrators was selected and requested to review the questionnaires for constructive criticism, comment, and suggestions regarding content. This group was selected from assistant superintendents and from superintendents not selected in the sample. Following this review of the instrument, the updated questionnaires were then distributed to 10 additional superintendents who were not selected for the sample. This group of administrators again offered suggestions for the improvement of the instrument. Revisions from those reviews were incorporated into the final instrument.

#### Data Collection

Data were collected through the use of the survey instrument (See Appendix B). A packet of materials was mailed to the randomly selected

Oklahoma public school superintendents. Included in the packet were a letter of introduction (See Appendix C), instructions, the questionnaire itself, and a self-addressed, stamped envelope for prompt response. Three weeks after the initial mailing, a follow-up postcard (See Appendix D) was mailed to all superintendents who had not yet returned the questionnaire. After an additional two weeks, telephone contacts were made with those subjects who had not yet returned the instrument. A confidentiality procedure was enforced to protect the identity of the participants in the survey.

#### Analysis of the Data

Data from the questionnaire mailed to the superintendents were reported through descriptive statistics using percentage distribution and measures of central tendency. The Pearson Correlation Matrix was used to analyze the relationships among the variables categorized by demographics, by perceptions, and by reform topics. Additional information from the comment sections of the questionnaire was reported in narrative form (See Appendix E).

## CHAPTER IV

### PRESENTATION AND INTERPRETATION OF DATA

The literature has shown that nearly any type of change will be associated with some degree of controversy. The changes brought about by Oklahoma's reform bill, HB 1017, were no exception. During the course of debate over HB 1017, dissenting views existed among superintendents regarding the provisions of, and thus the degree of support for, the bill. This study was conducted to determine Oklahoma superintendents' perceptions of change as defined by their perceptions of reform measures contained in HB 1017. The sample consisted of 110 superintendents randomly selected from the population of 450 Oklahoma public school superintendents. A total of 87 superintendents, or 79% of those surveyed, completed and returned the instrument which furnished the data for this study. The collected data are reported in this chapter.

#### Demographics

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

Table I indicates the distribution of respondents according to district size as determined by ADM. Data for the population were also used to indicate distribution in frequency and in percentage. Figures from the Oklahoma State Department of Education indicate that the distributions of the population and the respondents are relatively similar, with the majority of school districts of both groups reporting a per-district ADM of 3,000 or less. Where the largest single group of respondents (33%) were from school districts between 251 and 500 ADM, that size also constituted the largest group of school districts in the total population. The three largest size categories of school districts were represented by only four districts (4.7%) whose superintendents responded to the survey. While it is recognized that such small cell sizes present difficulty in analyzing data, the largest districts comprise a similarly small proportion of the population of Oklahoma independent school districts.

The distribution of the school districts by region is shown in Table II. The districts were divided into quadrants within the State of Oklahoma by Interstate Highway 35 (north to south) and Interstate Highway 40 (west to east). The number of respondents from each quadrant indicates a fairly equal distribution. The Southeast region of the state had the majority of respondents (32%) while the Southwest region of the state comprised 21% of the respondents. When comparing the total population to the respondents, a similar distribution can be seen for both groups. Population figures were derived through the number of Oklahoma Association of School Administrators (OASA) districts within each quadrant of the state (CCOSA, 1991). Since not all superintendents are OASA members, these data represent

TABLE I  
DISTRIBUTION OF OKLAHOMA SCHOOL DISTRICTS BY SIZE (ADM)

District Size	Respondents		Population*	
	N	%	N	%
0 - 250	14	16.1	97	21.6
251 - 500	29	33.3	150	33.3
501 - 1,000	22	25.3	93	20.7
1001 - 3,000	18	20.7	81	18.0
3001 - 5,000	1	1.2	11	2.4
5001 - 10,000	2	2.3	9	2.0
10,000+	<u>1</u>	<u>1.2</u>	<u>9</u>	<u>2.0</u>
Totals	87	100.0	450	100.0

\*Oklahoma State Department of Education, 1991.

TABLE II  
DISTRIBUTION OF OKLAHOMA SCHOOL DISTRICTS BY REGION

Quadrant	Respondents		Population	
	N	%	N	%
Northwest	20	23.0	90	20.1
Northeast	21	24.1	142	31.8
Southwest	18	20.7	91	20.4
Southeast	<u>28</u>	<u>32.2</u>	<u>124</u>	<u>27.7</u>
Totals	87	100.0	447	100.0



most, but not all, of the population.

Table III shows the frequency and percentage distribution by gender of both respondents and the population of Oklahoma superintendents listed by full time equivalency (FTE). It is obvious that, as with national figures, only a very small proportion of Oklahoma superintendents are female.

The distribution of superintendents by age is shown in Table IV. According to the National School Boards Association, the figures represented for the State of Oklahoma are typical of nationwide statistics regarding the median age of public school superintendents. Though population statistics for age were unavailable for Oklahoma public school superintendents, there was no available evidence that the population would differ significantly from the reported national statistics.

Table V indicates the respondents' years of experience as superintendent. The greatest percentage of respondents were those with zero to three (0-3) years of experience (24%) and those with over 15 years of experience (32%). Nearly half of the respondents had 12 or more years of experience.

#### Reform Issues

Part II of the survey included questions aimed at revealing superintendents' perceptions of education reforms. The survey segment was divided according to six different reform issues included in provisions of HB 1017. The six reforms selected for inclusion in this study were (1) voluntary annexation or consolidation, (2) career teacher/tenure, (3) minimum salary schedule, (4) accreditation

TABLE III  
DISTRIBUTION OF OKLAHOMA SUPERINTENDENTS BY GENDER

Gender	<u>Respondents</u>		<u>Population*</u>	
	FTE	%	FTE	%
Female	4	4.6	13	2.9
Male	<u>83</u>	<u>95.4</u>	<u>437</u>	<u>97.1</u>
Totals	87	100.0	450	100.0

\*Oklahoma State Department of Education, 1991.

TABLE IV  
DISTRIBUTION OF RESPONDENTS BY AGE

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Age Group	Number of Respondents	Percentage of Respondents
Under 31	0	0.0
31-40	15	17.2
41-50	46	52.9
51-60	24	27.6
Over 60	<u>2</u>	<u>2.3</u>
Totals	87	100.0

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TABLE V  
DISTRIBUTION OF RESPONDENTS BY YEARS OF EXPERIENCE

Years of Experience as Superintendent	Respondents	
	N	%
0 - 3	21	24.1
4 - 7	16	18.4
6 - 11	9	10.3
12 - 15	13	14.9
Over 15	<u>28</u>	<u>32.2</u>
Totals	87	100.0

standards, (5) Common School Fund, and (6) Oklahoma Curriculum Committee. For each reform, the superintendents were asked to indicate their perceptions regarding: (1) their degree of understanding of the issue, (2) the statewide impact of the reform, (3) the impact on their own school districts, (4) their initial support or opposition to the reform, and (5) whether their support changed with time. The remainder of this portion of the chapter has been organized by these five categories of perception.

### Understanding

The first research question was stated as follows: "To what degree do you understand the provisions in HB 1017 which pertain to [the reform issue]?" Each superintendent was asked to report the degree of understanding of each issue by selecting a rating of "fully understand," "mostly understand," "somewhat understand," "somewhat uninformed," or "totally uninformed." The data collected from participating superintendents are represented in Table VI.

Responding to questions about their understanding of education reform, 96.2% of the superintendents reported that they understood, to some degree, all of the issues contained in the survey. Only 3.4% of the respondents reported to be somewhat uninformed on the issues. The minimum salary schedule received the highest degree of understanding by superintendents, with 71% of the respondents reporting that they fully understood this issue. On the other hand, approximately 7% of the superintendents considered themselves to be somewhat uninformed on the two least understood issues, the Common School Fund and the Oklahoma Curriculum Committee. Accreditation

TABLE VI

DEGREE OF UNDERSTANDING BY SUPERINTENDENTS OF EDUCATION REFORM ISSUES

	<u>Fully Understand</u>		<u>Mostly Understand</u>		<u>Somewhat Understand</u>		<u>Somewhat Uninformed</u>		<u>Totally Uninformed</u>		$\bar{X}$	
	f	%	f	%	f	%	f	%	f	%		
Totals	(5)		(4)		(3)		(2)		(1)			
Voluntary Consolidation	26	29.9	48	55.2	13	14.9	0	.00	0	.00	4.15	
Career Teacher/Tenure	12	13.8	51	58.6	21	24.1	3	3.4	0	.00	3.83	
Minimum Salary Schedule	62	71.3	24	27.6	1	1.1	0	.00	0	.00	4.70	
Accreditation Standards	16	18.4	50	57.5	17	19.5	3	3.4	1	1.1	3.89	
Common School Fund	17	19.5	43	49.4	21	24.1	6	6.9	0	.00	3.83	
Oklahoma Curriculum Committee	9	10.3	37	42.5	34	39.1	6	6.9	0	.00	3.54	
	$\bar{X}$	=	23.7	27.2	42.2	48.5	17.8	20.5	3.0	3.4	0.3	.00

standards and the career teacher and tenure provisions were also perceived as issues on which respondents reported to be relatively less informed.

### Overall Impact

Superintendents' perceptions of the overall statewide impact of the education reforms were the focus of the second research question. Superintendents were asked to gauge the degree of such impact by selecting a rating of "very positive," "somewhat positive," "no impact," "somewhat negative," or "very negative." The analysis of data collected from participant superintendents are represented in Table VII.

The data in Table VII indicate that two thirds of the school superintendents perceived that the survey issues would have a positive impact on public education in Oklahoma. An overall negative impact was perceived by only 16% of the superintendents, while 15% of the superintendents believed that the provisions would have no impact on public education in the state. The issue receiving the most positive response was the minimum salary schedule. Approximately 90% of the superintendents thought that the minimum salary schedule would have a positive impact on public education, while 70% had a similar perception on the accreditation standards. The issue that was perceived to have the most negative impact on public education was the Common School Fund. Nearly 24% of the respondents believed that the Common School Fund would have a negative impact on public education in Oklahoma. Only 38% of superintendents perceived the career teacher and tenure changes in a positive manner.

TABLE VII

SUPERINTENDENTS' PERCEPTIONS OF THE IMPACT OF EDUCATION REFORMS  
ON OKLAHOMA PUBLIC EDUCATION

	Very Positive		Somewhat Positive		No Impact		Somewhat Negative		Very Negative		No Response	$\bar{X}$
	f	%	f	%	f	%	f	%	f	%		
Totals	(+2)		(+1)		(0)		(-1)		(-2)			
Voluntary Consolidation	9	10.3	50	57.5	13	14.9	11	12.6	4	4.6	0	+0.56
Career Teacher/Tenure	2	2.3	31	35.6	35	40.2	14	16.1	5	5.7	0	+0.13
Minimum Salary Schedule	33	37.9	45	51.7	4	4.6	3	3.4	2	2.3	0	+1.20
Accreditation Standards	20	23.0	49	55.3	5	5.7	10	11.5	2	2.3	1	+0.87
Common School Fund	19	21.8	36	41.4	11	12.6	19	21.8	2	2.3	0	+0.59
Oklahoma Curriculum Committee	3	3.4	60	69.0	10	1.5	12	13.8	1	1.1	1	+0.60
$\bar{X}$ =	14.3	16.1	45.2	51.9	13.0	14.9	11.5	13.2	2.7	3.1		



### Local Impact

The third research question was similar to the second but was focused on the reform measures' impact on each superintendent's own school district. Superintendents were again asked to report the degree of impact by giving it a rating of "very positive," "somewhat positive," "no impact," "somewhat negative," or "very negative." The data thus collected from participating superintendents are represented in Table VIII.

Overall, the superintendents were less positive regarding the issues' impact on their own school districts than they were in regard to statewide impact. On the average, only 53% of the superintendents perceived the issues to have a positive impact on their respective school districts. No significant impact on individual school districts was anticipated by 28% of the respondents, while 19% believed that there would be a negative impact on their districts. Again, the issue receiving the most positive response was the minimum salary schedule, with approximately 75% of the superintendents reporting a positive impact of that change on their school districts. Accreditation standards were perceived as having positive local impact by 69% of the respondents. The Common School Fund was perceived to have the most negative impact on school districts as so indicated by nearly 29% of the respondents. However, the overall lowest perceptions were reported for the issues of voluntary consolidation and career teacher/tenure.

### Initial Support

The fourth research question was stated as follows: "What was your position relative to [the reform issue] in HB 1017 prior to and

TABLE VIII

SUPERINTENDENTS' PERCEPTIONS OF THE IMPACT OF EDUCATION REFORMS  
ON THEIR SCHOOL DISTRICTS

	<u>Very Positive</u>		<u>Somewhat Positive</u>		<u>No Impact</u>		<u>Somewhat Negative</u>		<u>Very Negative</u>		<u>No Response</u>	<u>X</u>
	f	%	f	%	f	%	f	%	f	%		
Totals	(+2)		(+1)		(0)		(-1)		(-2)			
Voluntary Consolidation	5	5.7	19	21.8	48	55.2	10	11.5	5	5.7	0	+0.10
Career Teacher/Tenure	1	1.1	25	28.7	45	51.7	14	16.1	2	2.3	0	+0.10
Minimum Salary Schedule	27	31.0	38	43.7	8	9.2	10	11.5	4	4.6	0	+0.85
Accreditation Standards	15	17.2	45	51.7	13	14.9	11	12.6	2	2.3	1	+0.70
Common School Fund	23	26.4	25	28.7	14	16.1	19	21.8	6	6.9	0	+0.46
Oklahoma Curriculum Committee	2	2.3	51	58.6	17	19.5	14	16.1	2	2.3	1	+0.43
$\bar{X}$ =	12.2	14.0	33.8	38.9	24.2	27.8	13.0	14.9	3.5	4.0		

during the time the bill was being debated in November of 1989?" Superintendents were asked to report their degree of support by selecting a rating of "very supportive," "somewhat supportive," "neutral," "somewhat opposed," or "very opposed."

As shown in Table IX, the data indicate that, on the average, 60% of the respondents had been supportive of the issues listed in the survey, while 21% considered themselves to have been neutral, and only 19% of the respondents had been opposed to the issues listed in the survey. The issue receiving the most opposition at that time was the career teacher/tenure provision while the minimum salary schedule ranked highest in the degree of support at that time.

#### Change in Support

The final research question was focused on whether, and to what degree, the respondents' positions had changed, in regard to the education reforms, since November of 1989? Superintendents were asked to report such change in support by selecting a rating of "much more supportive now," "somewhat more supportive now," "no change," "somewhat more opposed now," or "much more opposed now."

A change in support of the reforms was reported by an average of 12% of the superintendents, as indicated in Table X. While 87% of the superintendents reported no change in their positions, those who had changed were somewhat evenly divided between those who were now more supportive and those who were now more opposed to the provisions. The voluntary consolidation issue was ranked as the issue for which the largest number of superintendents changed their response to become more supportive. The minimum salary schedule provisions received the

TABLE IX

OKLAHOMA SUPERINTENDENTS' SUPPORT FOR EDUCATION REFORMS PRIOR TO  
NOVEMBER OF 1989

	Very Positive		Somewhat Positive		No Impact		Somewhat Negative		Very Negative		No Response		<u>X</u>
	f	%	f	%	f	%	f	%	f	%	f		
Totals	( +2 )		( +1 )		( 0 )		( -1 )		( -2 )				
Voluntary Consolidation	20	23.0	32	36.8	19	21.8	7	8.0	9	10.3	0	+0.54	
Career Teacher/Tenure	3	3.4	33	37.9	26	29.9	16	18.4	9	10.3	0	+0.06	
Minimum Salary Schedule	45	51.7	30	34.5	4	4.6	6	6.9	2	2.3	0	+1.26	
Accreditation Standards	24	27.6	36	41.4	12	13.8	15	17.2	0	.00	0	+0.79	
Common School Fund	29	33.3	21	24.1	18	20.7	11	2.6	8	9.2	0	+0.60	
Oklahoma Curriculum Committee	7	8.0	32	36.8	30	34.5	16	18.4	1	1.1	0	+0.32	
$\bar{X}$ =	21.3	24.5	30.7	35.3	18.2	20.9	11.8	13.6	4.8	5.5			

TABLE X

## CHANGE IN OKLAHOMA SUPERINTENDENTS' SUPPORT FOR EDUCATION REFORMS

	<u>Very Positive</u>		<u>Somewhat Positive</u>		<u>No Impact</u>		<u>Somewhat Negative</u>		<u>Very Negative</u>		<u>No Response</u>	<u>X</u>
	f	%	f	%	f	%	f	%	f	%	f	
Totals	(+2)		(+1)		(0)		(-1)		(-2)			
Voluntary Consolidation	1	1.1	9	10.3	72	82.8	2	2.3	3	3.4	0	+0.03
Career Teacher/Tenure	2	2.3	3	3.4	75	86.2	6	6.9	1	1.1	0	-0.01
Minimum Salary Schedule	3	3.4	3	3.4	73	83.9	6	6.9	2	2.3	0	-0.01
Accreditation Standards	0	.00	4	4.6	81	93.1	0	.00	1	1.1	1	+0.02
Common School Fund	2	2.3	4	4.6	77	88.5	3	3.4	0	.00	1	+0.06
Oklahoma Curriculum Committee	1	1.1	2	2.3	77	88.5	4	4.6	1	1.1	2	-0.02
$\bar{X}$ =	1.5	1.7	4.2	4.8	75.8	87.2	3.5	4.0	1.3	1.5		

most change in a negative direction, and the accreditation standards received the least amount of change.

In summary, superintendents were somewhat positive or supportive of all of the selected education reform issues in HB 1017. Of the reform issues listed in the survey, the superintendents were most supportive of the minimum salary schedule provisions, which they also perceived to have the most positive overall impact. The respondents ranked the career teacher/tenure provisions of HB 1017 as having the least positive overall impact and reported a neutral stance regarding support for that issue. Generally speaking, superintendents reported that they understood all of the reform issues listed in the survey. While the original support or opposition varied considerably among the issues, the majority of superintendents did not report any change in the degree of support or opposition to any of the reform issues following the extensive debates which began in November of 1989.

#### Significant Correlations

Using a Pearson Correlation Matrix to analyze the relationship among 30 specific variables, comparisons were made between support variables and demographic variables to determine whether or not a significant relationships among the possible comparisons existed. The support variables included degree of understanding, degree of statewide impact on public education, degree of impact on local school district, degree of support prior to November of 1989, change in degree of support after November of 1989, and overall degree of support, a composite of original support and change in support. The demographic variables included size (ADM) of the district, and age, gender, and

years of experience of the superintendent. With the degrees of freedom equal to 85, and a significance level of .05, the required  $r$  value was determined to be .205. Of the 30 possible relationships, 15 were found to be statistically significant at the .05 level. Correlational values represented may appear as inverse due to the method of scoring for this part of the analysis (1 = fully understand, 2 = mostly understand, 3 = somewhat understand, 4 = somewhat uninformed, 5 = totally uninformed).

Table XI provides an overview of the significant correlations. The analysis of the demographic variables found a significant negative correlation between degree of understanding and size of the school. This negative correlation, however, suggests that superintendents from larger school districts tended to perceive themselves as having a greater degree of understanding of the HB 1017 issues included in this survey. A negative correlation was also indicated for the perceived impact on public education and the size of the school district. The correlation again suggests that superintendents from larger school districts perceived the impact on public education to be more positive than did superintendents from smaller school districts. A similar correlation was found between the perceived impact on local school districts and the size of the school district. Superintendents from larger school districts perceived the impact on their respective school districts to be more positive than did superintendents from smaller school districts. The same type of relationship was also reported between the degree of support prior to November of 1989 and the size of the school district. An analysis of the data revealed that, the larger the school district in size, the more supportive the superintendent was

TABLE XI  
SIGNIFICANT CORRELATIONS

Relationship	ADM	Understanding	Impact on Public Education	Impact on School District	Age/ Experience	Position
Degree of Understanding	-0.219 *	1.000			-0.092/-0.160	
Impact on Public Education	-0.277 *	0.076	1.000		-0.024/ 0.042	
Impact on School District	-0.280 *	-0.020	0.825 *	1.000	-0.009/ 0.063	
Degree of Support Prior to November 1989	-0.372 *	0.172	0.753 *	0.735 *	-0.054/-0.090	1.000
Degree of Support After After November 1989	-0.152	-0.258 *	0.502 *	0.497 *	-0.027/-0.044	0.305 *
Overall Support	-0.362 *	0.046	0.805 *	0.789 *	-0.055/-0.091	0.936

df = 85

Significance level .05

r = .205



inclined to be during the time the bill was being debated in November of 1989 and the more overall support the superintendent reported for each of the surveyed issues.

An analysis of the support variables indicated positive correlations with the exception of the correlation between change in degree of support after November of 1989 and the degree of understanding. This negative correlation indicates that, the higher the degree of understanding of the provisions prior to November of 1989, the less inclined the superintendent was to change his or her position following the debate on the issues.

The remaining significant correlations were found to be positive. A relatively strong correlation was reported between the perceived impact on public education in the state and the perceived impact on the local school district. This relationship suggests that superintendents who believed that the impact would have a positive effect on their respective school districts also believed that, on the whole, the impact of the provisions would have a positive effect on public education. A similar relationship was reported between impact on public education and degree of support prior to November of 1989. Superintendents who thought the provisions would have a more positive impact on public education also reported a higher degree of support for the provisions prior to November of 1989. Similarly, the relationship between degree of impact on public education and change in the degree of support indicated that superintendents who perceived a more positive impact on public education were also more supportive of the bill following the debate on the issues in November of 1989. A strong positive relationship was indicated between the degree of impact on

public education and the overall degree of support for the provisions. This correlation suggests that superintendents who believed the impact on public education to be more positive also ranked higher in overall support of the issues pertaining to the survey.

Significant positive correlations were found between support variables and the perceived impact on local school districts. The data indicated that superintendents who perceived a more positive impact on their local districts were also more supportive of the overall provisions of the bill prior to November of 1989. The same positive relationship was suggested for superintendents who perceived a more positive impact on school districts and change in degree of support following November of 1989. Similarly, superintendents who thought the impact on their school district would be positive also reported more overall support for HB 1017.

Finally, a significant relationship was indicated between the degree of support of the provisions prior to and during November of 1989. Superintendents who reported themselves to be supportive of the bill prior to November of 1989 also reported themselves to be as supportive following the debate in November of 1989.

On each of the issues listed in the survey, the respondents were asked to comment on the provisions listed from HB 1017. The superintendents' comments were encouraged in order to provide greater understanding of the data analysis. It is easy to feel the effect of many of the comments and opinions offered by the respondents.

For each reform issue, the comment section was separated into two sections. One section requests factors leading to a change in position

and the other section asking for open comments. The comments are provided in narrative form in Appendix E.

## CHAPTER V

### SUMMARY, CONCLUSIONS, RECOMMENDATIONS AND COMMENTARY

A review of the literature indicated that Oklahoma's education reform movement was an evolutionary response to the attention gained from the 1983 report A Nation at Risk: The Imperative for Education Reform. That document, along with many other ensuing reports, set the stage for the pervasive concern over the quality and condition of our schools and school systems. Nearly every state has responded to the demand for change following the "after-shock" of the series of reports released over the past decade. Hence, reform is the quest of the present and the future.

Oklahoma launched its most recent reform campaign when Governor Henry Bellmon called a special legislative session and, with the legislative leadership, appointed the 31-member Task Force 2000, whose charge was to develop a blueprint for the immediate and future needs of public education in Oklahoma. The committee studied the needs and concerns for educational improvement in the State of Oklahoma and made its final recommendations to the legislature on November 6, 1989. Legislators discussed and debated the recommendations for educational excellence made by Task Force 2000. The majority of the recommendations were incorporated into reform legislation known as

HB 1017, which was signed into law on April 25, 1990.

The lengthy battle that was fought over the passage of HB 1017 was both controversial and exhausting. While emotions ran high, a great deal of the media attention was focused upon the issues themselves. What was overlooked was the degree of support or opposition that may or may not have been voiced by the top ranking officials of the school districts. Many educators were surprised to learn that not all superintendents supported the passage of this omnibus education reform bill. At the same time, the variables which influenced the decisions of public school superintendents in regard to change and education reform did not receive the attention that was due.

The purpose of this study, then, was to focus on Oklahoma superintendents' perceptions of change in relation to the education reforms in Oklahoma as proposed in HB 1017. Through the study of current change and reform efforts in Oklahoma, these data may assist educators in planning, implementing, and evaluating future change and reform processes. The following questions served as focal points for this study.

1. To what degree do school superintendents support or oppose the reform efforts in Oklahoma?
2. How do superintendents assess the potential impact and effectiveness of change and reform?
3. Are there regional differences regarding support or opposition to change and reform efforts?
4. Does the amount of experience affect the manner in which superintendents perceive education change and reform?

5. Does the size of the school district have any bearing on whether superintendents support or oppose change?

6. Are there instances in which change or reform efforts are viewed differently by superintendents and their constituencies? If so, how do superintendents deal with the inherent conflict?

A survey instrument was mailed to 110 randomly selected public school superintendents from the population of 450 superintendents of Oklahoma independent public school districts. Using Likert-type scales, the superintendents were asked to rank their responses to items which were focused on their understanding, perceptions of impact, and support in regard to six major reforms contained in HB 1017. Of the 110 questionnaires that were mailed out, 87 were returned for a 79% response rate. In addition to an analysis of correlation among variables, data from the questionnaire were reported through descriptive statistics using frequency, percentage distribution, and measures of central tendency.

Superintendents from districts ranging from 251 to 500 ADM constituted the largest group of respondents from the survey. The smallest number of respondents were those whose districts contained 10,000 or more students. The sample was considered to be representative of the total population for the State of Oklahoma. School district size was strongly and consistently significant throughout much of the data analysis.

All four quadrants of the state were fairly represented in the sample population. The largest group of respondents were from the Southeast region of the state, and the smallest group of respondents was from the Southwest region. This demographic variable emerged as

significant in the data analysis.

A very wide discrepancy representing the gender of the superintendents was consistent with the total population of superintendents in Oklahoma. The low percentage of female superintendents versus the high percentage of male superintendents appears in national statistics as well. No significant gender differences were identified in the data analysis perhaps in part due to the relative cell sizes. The largest group of superintendents consisted of those between the ages of 41 and 50, while the smallest group of superintendents was composed of those over the age of 60. Although a category was designed for superintendents under the age of 31, none were reported. No consistent differences were identified using age as a comparative variable.

Superintendents with more than 15 years of experience comprised the largest group of respondents while those with 8 to 11 years of experience were reported as the smallest group of respondents. Data on the range of experience in the total population were not available. There were no significant differences that were prominent in the data when analyzed by years of experience.

Of the five demographic variables that were listed in the questionnaire, only two of the variables thus remained significant. Personal data such as age, gender, and years of experience did not emerge as statistically significant in any of the 30 variable correlations. The district data, size of district and region of the state, consistently emerged as statistically significant.

Statistically significant relationships were found to exist in 15 of the 30 variable combinations. A significant correlation was found

between the degree of understanding of HB 1017 provisions and the size of the school district. Superintendents from larger school districts also reported to a greater degree their perception that the overall impact of the education reforms would be more positive for the state. Similarly, those superintendents indicated that the impact on their respective school districts would be more positive than did the superintendents from smaller school districts.

When asked to what degree they supported HB 1017 prior to and during its initial debate in November of 1989, the superintendents from the larger districts reported more support for the bill than did their counterparts. Their support apparently has not changed since that time, as the degree of continued overall support was also ranked higher by those in the larger school districts than by their peers in smaller school districts.

Another statistically significant correlation was found between the districts' regional location and the superintendents' degree of understanding. Data analysis suggested that superintendents who represented districts in the Northwest and Northeast quadrants of the State perceived themselves as more knowledgeable of the HB 1017 issues than did superintendents from the Southwest and Southeast regions.

Yet another finding suggested that the higher the degree of understanding (of all the issues in the questionnaire) prior to November of 1989, the less inclined the superintendent was to change his or her position on that issue. This finding included superintendents from all district sizes.

A parallel analysis was noted between the degree of impact on public education and the change in degree of support. Superintendents



who thought HB 1017 would have a more positive impact on public education were more inclined to continue supporting the bill after its debate in November of 1989. Analogous to that finding, superintendents who reported a belief that the impact of the reform on public education to be positive also ranked higher in the amount of overall support of the issues.

Data analysis further revealed that the more positive perceptions superintendents had of the impact on their local districts, the more supportive they were of the overall provisions of the bill prior to and after November of 1989. In other words if they thought that the provisions would positively impact their own districts, their opinions or degrees of support did not change at any future time.

### Conclusions

1. Superintendents' perceptions of the statewide impact of reform issues tend to be based upon their perceptions of those issues' impact on their own local school districts. Many administrators pride themselves on their ability to "see the whole picture" in educational administration. So often administrators tout their decision making abilities to be based upon the best interest of all. Yet, this conclusion clearly implies that an administrator's "global view" may be somewhat nearsighted, that is, the distance seen may only be as far as one chooses to see. This view should not necessarily be construed as wrongful, but rather should be understood as situational; that is, administrators and superintendents will be and should be protective of their school districts. The focus of this conclusion is on the idea that superintendents may need to question "best practices" in their

approach to decision-making and support or opposition to education reform for the State.

2. Superintendents of larger school districts may well be more receptive to change than their counterparts in smaller districts. Superintendents from larger school districts may be more supportive of education reform issues because they are perceived to understand the issues better than do superintendents from smaller school districts. At the same time, an assertion could also be made that superintendents from smaller districts are less supportive of the education reform issues because of anticipated greater adverse effects of the reforms on their districts. A third explanation may be that superintendents of larger school districts have the desire or the ability to view the effects of reform issues more globally than do superintendents from smaller districts. While that question cannot be answered in this study, it still may be a viable consideration. If nothing else, it merits thought.

3. Personal data such as age, years of experience, and gender have little bearing on the superintendent's perceptions of change and reform. The literature supports the notion that change and innovation come from a desire within one's self to change (Deal, 1986). If this is indeed true, then little difference would be expected when considering the age, gender, or years of administrative experience that one claims. To further clarify, the amount of support or opposition to Oklahoma's education reform bill, or the degree to which one supports the changes brought forth by any of the provisions of HB 1017, are most likely based upon one's own philosophy, paradigm, or world view. Depending upon how one views the realities imposed by a changing

society (good, bad, or indifferent), a better indication of the reception to change and innovation can be gauged.

4. Superintendents from larger school districts tend to be better informed and have a greater understanding of education reform issues than do their counterparts in smaller school districts. This may well be founded on the fact that superintendents from smaller school districts typically have fewer professional and support staff than do the larger district superintendents. The latter group can rely upon their assistants and other specialists to maintain daily operations, thus freeing themselves to attend informational meetings and conferences and allowing more time to consider research and other information, whereas smaller district superintendents do not have this luxury. Superintendents in smaller school districts frequently must be "jacks-of-all-trades," taking the responsibility for a multiplicity of administrative and other tasks which may divert their attention from statewide issues and mandate their continuing presence within their own schools.

5. Superintendents from the Southwest and Southeast quadrants of the State are perceived to have a lesser understanding of education reform issues than do superintendents from the Northwest and Northeast quadrants of the State. The school districts in the southern half of Oklahoma are relatively smaller in size than the school districts in the northern half of the State. Hence, superintendents who were from the southern regions ranked themselves as having a lesser overall degree of understanding of the reform issues than did superintendents from the somewhat larger districts in the northern quadrants. This may be consistent with the previous comment that superintendents from

smaller districts simply do not have the support staff to maintain all daily operations while accessing and researching new information, attending conferences and meetings, and maintaining an active role in state decision making.

#### Recommendations

1. It is recommended that further study be directed to more accurately assess and then compare superintendents' actual level of knowledge of educational issues versus their perceived level of knowledge. The results of such an assessment could be used to determine possible needs for changes in preparation programs for school administrators or better systems for informing practitioners of the current issues and their possible impact.

2. Information reflecting the perceptions of school board members and/or legislators in regard to change and education reform efforts could be useful for administrators and other change agents in planning change strategies.

3. Research from a theoretical standpoint would be useful for determining superintendents' paradigmatic placement. As personal demographic data were concluded to have no bearing on the degree of support for change, data could be gathered to support or oppose reform efforts based upon the confirmation of certain realities or world views of superintendents.

4. The data from this study supported the conclusion that superintendents from smaller school districts were less receptive to change than were their counterparts from larger school districts. Further research is needed to determine whether superintendents who

oppose certain changes imposed by reform initiatives do so because of the potentially adverse effects on their districts or whether the opposition is due to a personal dislike for change. Again, this information could be beneficial to change agents and change planners alike.

5. A replication of this study should prove interesting to see if superintendents' perceptions of the reform issues of HB 1017 have changed since the study was first conducted in 1990. Since that time, superintendents have had time to study the bill and to become well acquainted with the implemented standards and provisions, and thus the potential effects on their school districts.

6. The overall degree of understanding surfaced as an important issue in the way it affected both perception of impact and the degree of support for education reform. Superintendents and administrators in key leadership roles must take the initiative to study current trends and issues which may affect not only their local school districts but all of the people of their states. There is a difference between being familiar with, and being knowledgeable of, education reform.

Over the two-month period when Task Force 2000 was meeting weekly to discuss various issues of education reform, the meetings were open to anyone wishing to attend. Typically, there were only a handful of superintendents present, if even that many. Some superintendents believed that their attendance was irrelevant--that the agenda and its recommendations were predetermined. Many superintendents chose to place more emphasis on their visits to the State Capitol following the recommendations by Task Force 2000 to the legislature. Still, the numbers of administrators in attendance were relatively sparse. Those

administrators who made a continual effort to discuss their concerns with state lawmakers were, generally speaking, those from larger school districts.

More concern and involvement should be voiced by superintendents as a whole, but particularly superintendents of smaller school districts in Oklahoma. Legislators need to listen to and involve these superintendents in the decision making process when the decisions made affect the schools themselves. In an effort to improve their understanding of current issues, small school districts should take a more active role in state and local government. Smaller school districts and their superintendents should not necessarily be considered as uninterested in educational politics. Hence, consideration should be given to smaller districts in helping find creative or alternative ways of promoting political involvement on the state level.

7. Superintendents judge the impact of change based upon the degree that changes will affect their school districts rather than based on the degree that changes will affect the entire state.

Superintendents and those in key leadership roles should develop and practice a shared vision for the State of Oklahoma. In an effort to reach this vision, superintendents and administrators alike should be prepared to make objective sacrifices in order to achieve the end goal. This is not to say that administrators and superintendents should not be protective of their school districts, but rather that superintendents may need to rethink their approach to decision making and support or opposition to education reform. Those who are in top leadership roles should question their stand relative to the degree of

support given to state reform issues. Positions of support should be based upon the best interest of all children in the state, and not just upon the nearsightedness of factional interests. Superintendents must be willing to set aside personal interests in favor of professional interests. If Oklahoma ever hopes to achieve its 21st century goals, then everyone must be willing to accept the sacrifices along the way. This arduous task will require frequent and continual communication between and among all facets of education. Further, it will require that those in key leadership roles within the state improve their knowledge base and understanding of current trends and issues facing public education today.

8. The Oklahoma Secretary of Education, in conjunction with the personnel in the State Department of Education, should serve as a facilitator of communication, to close the gap that currently exists between levels of education in the State and to promote a shared vision through the development of common goal setting among all segments of education. It is recognized that putting theory into practice is often difficult to accomplish. However, in order to achieve visionary, yet realistic goals for the entire education program of the State, the consensus of all is desired.

#### Commentary

Contrary to the desires and opinions of some state leaders the fact remains that Oklahoma will probably never emerge as a lighthouse for change and innovation for public schools. Speculations from leading authorities declare varying waves of reform in existence. While some states are experiencing third and even fourth-wave reform

efforts, the actions of the educational and legislative system in the State of Oklahoma clearly demonstrate that second-wave reform efforts are currently underway and, that in the national race Oklahoma's educational system is lagging rather than leading. Oklahoma ought not strut its stuff just yet.

During an interview with Dr. Kara Gae Wilson (February, 1991), Tulsa County Superintendent of Schools, Dr. Wilson commented, "we are not in the third-wave yet . . . we have not yet seen a power shift in Oklahoma." Conversations with other superintendents across the State have further supported the notion of second-wave reform efforts that are implemented to force change on both state and local levels. Perhaps the power struggle will shift in the State to allow more significant contributions by school superintendents in supporting and implementing change. The resulting controversy and debate over HB 1017 may have been curbed if school superintendents had greater input into the decision making process of education reform issues--the very issues that affect school districts. This projection seems almost paradoxical given the reality that superintendent input may not have been deemed necessary, albeit for what was determined to be good reason. The possibility exists that some state officials and state leaders believed that they could envision what was needed for Oklahoma without the input of superintendents. But the fact remains that as a whole, superintendents have had very little input in the public education system in regard to change planning and reform efforts. In the words of Rosow and Zager (1989, pp. 80-81):

State governors and legislators wear two hats. First, they are answerable to the electorate, so they must behave like politicians. Second, they are directly in control of education, so they must behave like managers.



Likewise, public school teachers are part of the electorate, but they are also employees of the politician/manager. Confusion between these dual roles often leads politicians/managers into the erroneous belief that they can improve the operation of schools merely by writing laws, issuing regulation, and manipulating budgets, with little regard for the opinions of front-line employees. The heads of America's largest private corporations have learned that they can no longer manage in that fashion. It is time for the politician/manager to catch up.

In an interview with Dr. C. G. Oliver, Superintendent of Broken Arrow Public Schools, a suburban school district in Tulsa County, when asked if he thought that the input of superintendents in the recommendations and planning process of HB 1017 was adequate, Dr. Oliver responded, "I would say that it was not. I don't think they took much of the advice of superintendents on anything."

This should not be construed to mean that educators in the State should not be pleased, or even proud of their accomplishments. But caution should be exercised in premature congratulations or extravagant claims of reform when the measures contained in HB 1017 should rightfully have been in place long ago. The system of public education in Oklahoma has certainly come a long way, but there can be no question that it still has a long way to go. Unless the power structure shifts, educators and non-educators who support necessary and forthcoming change and innovation should be prepared to encounter a bastion of barriers to change while facing lengthy legislative or court battles. The net results from HB 1017 should not be viewed solely by the scope and impact of the reform measures themselves, but also by the groundwork that was laid for future reform efforts due to the newly focused lens of the public's eye.

### The Winds of Change

As the standards and provisions imposed by HB 1017 are further cemented and, the certainty of funding is guaranteed, it will be time once again to initiate more changes and stronger reforms for the children of the State of Oklahoma. Efforts are underway this very moment to increase funding for higher education as everyone wants a piece of the pie, but in the near future it will be time for public education to regain momentum. When this occurs superintendents across the entire State must be well practiced in change strategies and educational politics, and they must assume a greater understanding of the issues at stake. For unless the players are equally armed, the game will become merely a match.

Educators, non-educators and, politicians, must begin rethinking the whole notion of change and reform. Those who cling tightly to past traditions will be left behind. Traditionalists must realize that time is of the essence in the race for excellence through worldwide competition. The narrow perceptions of many superintendents in regard to the degree of support for change must be expanded to allow for a more peripheral view of a changing state, a changing nation, and a changing world.

### Back to the Future

A decade ago, long before the advent of HB 1017, a group of Oklahoma superintendents organized an advisory group and a school board district coalition known as the Fair School Finance Council. Included in the advisory segment of the organization are approximately 40 school superintendents whose continued goal is to provide more equitable

funding for school districts in the State. During the development and implementation of HB 1017, the group put their plans on hold, pending an analysis of the likely impact of the funding provisions in HB 1017. With the failure of the related State Question 634, which attempted to equalize funding through a more even distribution of public utilities and other commercial/industrial ad valorem taxes, the Fair School Finance Council once again became active. The organization has filed a lawsuit against the State of Oklahoma, similar to the 1988 lawsuit filed in Kentucky, claiming "inadequacy" of educational funding. It is the expectation that this lawsuit will eventually move the jurisdiction to the Oklahoma Supreme Court (Oliver, 1991).

Following the passage of HB 1017, a group known as Stop Taxing Our People (STOP) was formed in an effort to refer the bill to a vote of the people. Apparently a sufficient number of signatures was gathered, but the move was slowed as the number of valid signatures was challenged. As time elapsed, the public interest has waned while the implementation of provisions and standards of the bill have materialized. Another coalition called Growth Oklahoma (GO) was formed in opposition to STOP. Members of this coalition have supported and advocated the structural changes and additional revenues that were needed to enable education reform to occur.

As the political ramifications of HB 1017 and its ensuing coalitions continue to surface, accusations and speculations run rampant. Most recently, the original chairman of STOP resigned to organize his own anti-tax group. This newest group, Oklahoma Taxpayers United, has established a goal of raising enough money to maintain a full-time lobbyist at the statehouse. The news of this controversy has

gone as far as to reach national publicity through coverage by Money Magazine (Stillwater News Press, January 6, 1991). As for the status of a referendum vote of the people, the outcome is still pending actions by the Oklahoma Supreme Court on various challenges.

What the future holds for the State of Oklahoma remains to be seen. Oklahoma will probably continue its conservative struggle in an effort to compete with other states who have the leading edge on reform. As for the reform era itself, within time, it too may come to a gradual ease. People cannot continue for any great length of time, to be bombarded with new ideas of change, innovation, and restructuring. There must be a constant or a security link that is entwined with the educational process. One thing that is for certain, those whom have been affected by change the most, have had input the least. In our quest of excellence and in our planning for change, shared decision making is a must.

Educators are cognizant of the needed changes facing our schools today. These educators know that the existing structure and current functions of the public schools must change in order to compete with an ever changing society in a competitive world market. For the most part, educators are fearful of the unknown when facing forced change. Those educators that thrive upon change and reform are in the minority of a resistance movement where things seem to have remained relatively stable in the face of a tremendous effort to make it different.

### Theoretical Considerations

Political theory as described by Deal (1986) emphasized both stature and power. Bearing in mind that it is power which directly

influences the outcomes of the organization, it appears that the events which led to the passage of HB 1017 were employed within a political model. Further, the mandates set forth from the bill reflected top-down (second wave reform) practices which are also characteristic of political theory.

When considering the process of Oklahoma's newest reform efforts, coupled with the final product of HB 1017, comparisons can be made which support the conclusion of such political victory. In the process of HB 1017, the "power" was presented in a hierarchical construct. That is, the political power was initially evident in the Academy for State Goals original January 1989 recommendations for change in Oklahoma public education. Many of the recommendations were then transferred to the Task Force 2000 Blueprint for Excellence which contained the recommendations that were made to the Legislature. When comparing the recommendations made by each organization, and the membership of both organizations, it is no coincidence that one shadowed the other. Through Task Force 2000, the earlier recommendations were thus carried on to the Legislature for final approval.

In comparing and contrasting political theory to structural theory there is a need to highlight similarities. Structural theory emphasizes a formal and purposeful organization. This framework stresses missions and goal setting, input, clarity of focus, and need. While political theory may appear somewhat "formal" because of the legal and technical intricacies of politics as well as the potential for bureaucratic involvement, one must remember that the distinction comes in the focus or the purpose of the change. Political theory

focuses on stature and power (self-aggrandizement) of a person or persons, while structural theory focuses on goals and visions of the organization.

Structural theory supports change through goal-setting which is determined by need. As Sizer (1986) pointed out, educational change should be made, or at least influenced, by those persons who are closest to the students. The process of change which was brought forth by HB 1017 was not based upon needs as determined by those closest to the students. Hence, goal-setting may have been symbolically sought by those individuals closest to the reform recommendations, but it was power and stature which drove the motives.

Considering the second wave of reform that Oklahoma may have just completed, the circumstantial top-down control of the mandated reforms seemed successful. However, if Oklahoma hopes to achieve further reforms in its public education system, a shift in power must occur. When this power shift emerges, the change-agents of the state should give serious consideration to change-strategy selection. State legislators and key officials need to examine a variety of models and select the model which most appropriately meets the needs of the people closest to the students. Given the four models presented in the review of literature, it appears that structural theory may prove more successful in third-wave reform initiatives as goals are realized by a shared vision among educators throughout the State of Oklahoma.

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APPENDIX A

SUMMARY OF HB 1017 REFORMS

## BILL SUMMARY

**MEASURE:** Conference Committee Substitute for HB 1017

**AUTHORS:** Representatives Lewis et al; Senator Cullison et al

**SUBJECT:** Common Education Reform

**PROVISIONS:**

### ACCREDITATION

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

### CURRICULUM

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

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

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

#### CONSOLIDATION/ANNEXATION

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

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

#### KINDERGARTEN/EARLY CHILDHOOD EDUCATION

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

### EXTENDED SCHOOL-YEAR PROGRAM

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

### TESTING

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

### DEREGULATION

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

### ALTERNATIVE TEACHER CERTIFICATION

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



### COUNTY SCHOOL SUPERINTENDENT

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

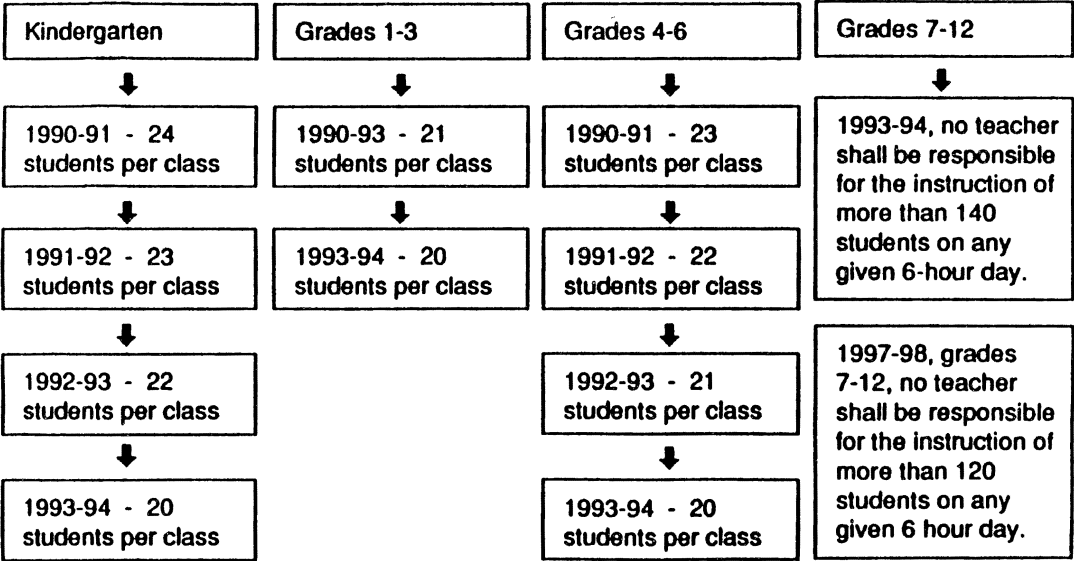
### CLASS SIZE REDUCTION

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

### PARENTAL INVOLVEMENT

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

# CLASS SIZE REDUCTION PROCESS



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

#### RESTRUCTURING THE LEARNING ENVIRONMENT

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

#### PARENTS OF FAMILIES RECEIVING AFDC

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

#### STUDENT DISCIPLINE

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

#### STATE BOARD OF EDUCATION

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

#### EDUCATION OVERSIGHT

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

### TEACHER SALARIES AND INCENTIVE PAY

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

### STAFF DEVELOPMENT

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

### MINORITY EDUCATORS

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

### VO-TECH

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

### AT-RISK STUDENTS

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

### TRAINING FOR SCHOOL ADMINISTRATORS

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

### SCHOOL/BUSINESS PARTNERSHIP

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

### TEACHER STANDARDS

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

### TEACHING PRINCIPALS' CERTIFICATION

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

### DUPLICATION IN EDUCATION SYSTEMS

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

### WEIGHT STUDY

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

### SPECIAL EDUCATION

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

### ADMINISTRATIVE COSTS

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

### STUDENT RECORDS

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

### TEACHER CONTRACTS AND SCHOOL PERSONNEL DUE PROCESS RIGHTS

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

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

### STUDENT TRANSFERS

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

### NEW SCHOOL FUNDS

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

### STATE AID FORMULA

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



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

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

#### TEACHER RETIREMENT

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

#### SCHOOL GENERAL AND BUILDING FUND

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

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

**SECTION 120:** Noncodification.

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

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

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

**SECTION 131:** Emergency

**PREPARED BY:** House Staff

**DATE:** January 30, 1990

GGH:go/HB1017

APPENDIX B

HB 1017 QUESTIONNAIRE

**Part I: Demographics**

1. Please circle the response which describes the size of your school district by ADM:

0-250    251-500    501-1000    1001-3000

3001-5000    5001-10,000    10,001+

2. Please circle the response which describes the region of your school district as divided by Interstate-35 (North to South) and Interstate-40 (West to East):

NW    NE    SW    SE

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

<30    31-40    41-50    51-60    >60

4. Please indicate your gender:

Female    Male

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

0-3    4-7    8-11    12-15    16+

**Part II: Voluntary Consolidation (Please circle response)**

1. To what degree do you understand the provisions in H.B. 1017 which pertain to voluntary annexation or consolidation?

Fully understand      Mostly understand      Somewhat understand      Somewhat uninformed      Totally uninformed

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

Very positive      Somewhat positive      No impact      Somewhat negative      Very negative

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

Very positive      Somewhat positive      No impact      Somewhat negative      Very negative

4. What was your position relative to the voluntary annexation or consolidation provisions in H.B. 1017 prior to and during the time the bill was being debated in November of 1989?

Very supportive      Somewhat supportive      Neutral      Somewhat opposed      Very opposed

5. Has your position changed, in regard to these provisions, since November?

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

6. What factors have caused your position to change?

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7. Please provide any comments you wish in regard to the voluntary annexation or consolidation provisions in H.B. 1017:

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**Part III: Career Teacher/Tenure (Please circle response)**

1. To what degree do you understand the provisions in H.B. 1017 which pertain to career teacher/tenure provisions?

Fully understand      Mostly understand      Somewhat understand      Somewhat uninformed      Totally uninformed

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

Very positive      Somewhat positive      No impact      Somewhat negative      Very negative

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

Very positive      Somewhat positive      No impact      Somewhat negative      Very negative

4. What was your position relative to the career teacher/tenure provisions in H.B. 1017 prior to and during the time the bill was being debated in November of 1989?

Very supportive      Somewhat supportive      Neutral      Somewhat opposed      Very opposed

5. Has your position changed, in regard to these provisions, since November?

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

6. What factors have caused your position to change?

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7. Please provide any comments you wish in regard to the career teacher/tenure provisions in H.B. 1017:

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**Part IV: Minimum Salary Schedule (Please circle response)**

1. To what degree do you understand the provisions in H.B. 1017 which pertain to the minimum salary schedule?

Fully understand      Mostly understand      Somewhat understand      Somewhat uninformed      Totally uninformed

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

Very positive      Somewhat positive      No impact      Somewhat negative      Very negative

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

Very positive      Somewhat positive      No impact      Somewhat negative      Very negative

4. What was your position relative to the minimum salary schedule provisions in H.B. 1017 prior to and during the time the bill was being debated in November of 1989?

Very supportive      Somewhat supportive      Neutral      Somewhat opposed      Very opposed

5. Has your position changed, in regard to these provisions, since November?

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

6. What factors have caused your position to change?

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7. Please provide any comments you wish in regard to the minimum salary schedule provisions in H.B. 1017:

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**Part V: Accreditation Standards (Please circle response)**

1. To what degree do you understand the provisions in H.B. 1017 which pertain to the minimum accreditation standards?

Fully understand      Mostly understand      Somewhat understand      Somewhat uninformed      Totally uninformed

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

Very positive      Somewhat positive      No impact      Somewhat negative      Very negative

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

Very positive      Somewhat positive      No impact      Somewhat negative      Very negative

4. What was your position relative to the minimum accreditation standards in H.B. 1017 prior to and during the time the bill was being debated in November of 1989?

Very supportive      Somewhat supportive      Neutral      Somewhat opposed      Very opposed

5. Has your position changed, in regard to these provisions, since November?

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

6. What factors have caused your position to change?

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7. Please provide any comments you wish in regard to the minimum accreditation standards in H.B. 1017:

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**Part VI: Common School Fund (Please circle response)**

1. To what degree do you understand the provisions in H.B. 1017 which pertain to the common school fund?

Fully understand      Mostly understand      Somewhat understand      Somewhat uninformed      Totally uninformed

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

Very positive      Somewhat positive      No impact      Somewhat negative      Very negative

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

Very positive      Somewhat positive      No impact      Somewhat negative      Very negative

4. What was your position relative to the common school fund provisions in H.B. 1017 prior to and during the time the bill was being debated in November of 1989?

Very supportive      Somewhat supportive      Neutral      Somewhat opposed      Very opposed

5. Has your position changed, in regard to these provisions, since November?

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

6. What factors have caused your position to change?

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7. Please provide any comments you wish in regard to the common school fund provisions in H.B. 1017:

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**Part VII: Oklahoma Curriculum Committee (Circle response)**

1. To what degree do you understand the provisions in H.B. 1017 which pertain to the Oklahoma Curriculum Committee?

Fully understand      Mostly understand      Somewhat understand      Somewhat uninformed      Totally uninformed

2. What overall impact do you believe the Oklahoma Curriculum Committee will have on public education in Oklahoma?

Very positive      Somewhat positive      No impact      Somewhat negative      Very negative

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

Very positive      Somewhat positive      No impact      Somewhat negative      Very negative

4. What was your position relative to the Oklahoma Curriculum Committee provisions in H.B. 1017 prior to and during the time the bill was being debated in November of 1989?

Very supportive      Somewhat supportive      Neutral      Somewhat opposed      Very opposed

5. Has your position changed, in regard to these provisions, since November?

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

6. What factors have caused your position to change?

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7. Please provide any comments you wish in regard to the Oklahoma Curriculum Committee provisions in H.B. 1017:

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APPENDIX C

SUPERINTENDENTS ' COVER LETTER

September 5, 1990

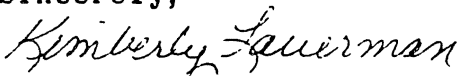
Dear Superintendent:

This letter is to request a few minutes of your time to respond to a questionnaire regarding House Bill 1017. As you are well aware, H.B. 1017 has stirred great state and national interest over the past year. As differences of opinions exist on H.B. 1017, every opinion and response is needed to accurately reflect the full picture of this bill. This questionnaire is being mailed to selected public school superintendents throughout the state. The investigation has been approved by several state officials, and a summary of the findings will be made available to all state legislators, State Board of Education, and school superintendents upon request. Additionally, a statewide summary will be available in the newsletter publication Better Schools.

The study is a part of doctoral research at Oklahoma State University. It is believed by this researcher that future legislation can be influenced in a positive way as a result of this study. This is your opportunity to respond anonymously concerning your perception of the impact of H.B. 1017 on your school district.

The questionnaire is self-addressed and stamped for your convenience in its return--simply fold, staple and mail. A space has been provided for comments which will be very helpful and are encouraged. Your timely cooperation will be deeply appreciated.

Sincerely,



Kimberly Lauerman  
Doctoral Student  
Oklahoma State University



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

APPENDIX D

FOLLOW-UP POSTCARD

September 26, 1990

Dear Superintendent:

By now you should have received a questionnaire on the topic of HB 1017. This information is needed for research efforts at Oklahoma State University. If you have not taken the time to respond to the questionnaire, would you please take a few minutes to do so? Your timely cooperation is greatly appreciated. Thank you!

Sincerely,



Kimberly Lauerman  
Doctoral Student  
Oklahoma State University

APPENDIX E

SUPERINTENDENTS' VOLUNTARY COMMENTS

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

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

1. Results.
2. If you mandate then fund.
3. The number of school districts seeking voluntary consolidation surprised me.
4. I am for stronger annexation requirements.
5. I do not see the voluntary consolidation plan improving overall education.
6. I feel that students are getting a better education from the smaller schools.
7. Our district has benefitted from the provision of preference for state grants (much more supportive).
8. Sparsity factor to allow those schools who have already consolidated to survive (somewhat more supportive now).
9. Consolidation will kill rural communities (much more opposed now).
10. The \$35 million incentive money from the "rainy day fund" is not much incentive at all due to so many stipulations attached to it (somewhat more opposed now).
11. Some of the school districts annexed can offer and meet state standards for their students (somewhat more supportive now).
12. There is no leadership at the State Department of Education (somewhat more supportive now).

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

1. Basically, it won't work. Loss of community identification is more than most are willing to endure.
2. Misleading.
3. Voluntary annexation is slow and undirected
4. I would think that there is a great deal of merit concerning the small school. Test scores seem to justify small schools and also less truancy and discipline problems.
5. Most of the schools in our area have already consolidated. We suggest other areas of the state catch up with us, area wise.
6. Consolidation should be based on the merits of the school system, not due to a lack of or loss of funding caused by proximity or location of the school district.
7. All dependent districts should be annexed to independent districts.
8. I believe that the "isolation factor" has allowed schools to stay open which should be closed!
9. Bus routes excessively long - a student could easily be on a bus between 3 and 4 hours a day.
10. 1017 allows for financial gain rather than status quo or loss in the a/c process. This motivates people to be more open to the change.
11. The provisions are very weak.
12. Consolidation will not improve financial atmosphere but should improve curriculum offering. Transportation costs will be a factor but not prohibitive.
13. It is nothing more than a bribery/scare tactic. It only results in bigger not better.
14. Consolidation is not the answer. The larger schools have already lost out on providing quality education, so why consider closing those that are providing what they cannot.
15. It is what I call humble defeat, it allows school districts to voluntarily consolidate just before they are mandated to consolidate.
16. Annexation or consolidation is a fact of life - people need to get ready for it.



17. Not tough enough - need to shut down at least 350 districts.
18. I do not believe that consolidation or annexation should be rewarded. I believe they should have to operate like all other schools. They should not be given any priorities.
19. It must be done! We need to provide more unregulated incentives to see that it is accomplished. A much better incentive package could have been put together. There are far too many bureaucratic regulations in the current incentives.
20. The funding measure to encourage consolidation is in need of revision. With proper guaranteed financial help more school districts would consolidate.
21. Geographical [location] and isolation should be considered by the state, or should be closely monitored to avoid impractical district boundaries.
22. Many districts were lead to believe they would receive more help and money than they have to this point.
23. Is size or quality education the goal of consolidation or annexation?
24. The future will tell the tale!
25. No one will voluntarily close and the ones that you hear have closed, have done so by duress.
26. Impact on our school (somewhat more supportive now).
27. Let the schools and communities decide for themselves.
28. 1017 will force most class B schools to annex or consolidate in the next 5 years.
29. Mandatory [consolidation] would be more effective!
30. It will not happen easily.
31. It was passed with one interpretation and administered on another.
32. I feel there are some schools that can't provide an adequate education for their students because of their extra-small size.
33. If they really want to provide some incentive monies to encourage voluntary consolidation, they need to eliminate the restrictions on the incentive funds so that those

funds could help districts for more than one year for new programs added. It is not much of an incentive to know that a district will have to shoulder the total responsibility for any new programs after one year.

34. Make it mandatory!
35. The people at the State Department of Education do not understand the intent of the assistance fund connected with voluntary consolidation.
36. The bill is misleading and no one has information to help you.

In regard to career teacher/tenure, what factors have caused your position to change?

1. Courts won't act in ten days. The requirement that we continue the salary makes it financially impossible to dismiss a teacher.
2. No results.
3. I didn't feel that it was that much of a change.
4. The original wording changed.
5. A teacher committee will most likely be reluctant to enter action of remediation, complaint, and/or dismissal.
6. Money a school district could have to spend (somewhat more opposed now).

Please provide any comments you wish relating to the career teacher/teacher issue.

1. I'm going to wait and see if it makes any difference in trying to remove a poor teacher before I judge it.
2. If you want real reform in education do away with teacher tenure. We have due process and that is good!
3. There is still too much built in protection for the weak teacher.
4. With the courts receiving a teacher case immediately following due process, there will be fewer cases tried.
5. Any plan that will improve the evaluation procedures of low performing teachers should be more acceptable.
6. Tenure should be abolished! There are safeguards built in by state law to protect employees from abuse

concerning dismissal without cause. Tenure ties our hands concerning bad teachers.

7. Tenure has always been difficult for the lay public to understand. Even 1017 is rather restrictive - beyond due process.
8. My opinion is prejudiced due to present conditions in our district, but I believe tenure has to be discontinued or educational upgrading will be seriously hampered. The only function that tenure has is protection of the low quality instructor.
9. It did not go far enough to create the "competitive-accountable" professional required for future.
10. No different than before.
11. Due process will continue to be lengthy and expensive.
12. I am well pleased that instructional ineffectiveness, unsatisfactory teaching performances and repeated negligence of duty have been added as grounds for dismissal. However, the problem with ineffective teachers is not with the teacher tenure law, but rather with administrators who are not performing their documentation, plan of improvement and appraisal duties in a responsible manner. We are spending far too little time working with nontenured teachers in an effort to improve their performance.
13. This new provision will keep lawyers busy, but will increase problems for education.
14. Can't see much change.
15. Public education lost an opportunity to do away with tenure for teachers.
16. There are many people teaching school that teach because they failed at everything else -- this type of person does not need to be in education.
17. For many of my teachers, it has been too little too late. Many teachers have already left the field.
18. Teachers in Oklahoma will continue to lag behind national norms as always.
19. Tenure is abused by OEA and teachers. Many poor teachers hide behind tenure, and OEA threats to boards protecting those people.
20. It is still very difficult to release poor teachers.

21. It seems that there has been very little change except that the post termination hearing has been replaced by a district court appearance.
22. The tenure law is having a very negative effect on teachers. The public does not support tenure.
23. I don't really believe that this issue will improve education.

What factors have caused your position to change in regard to the minimum salary schedules of teachers?

1. It didn't do anything for experienced teachers.
2. More money needed for minimum salary schedule. Other reforms of HB 1017 will cost more money than expected.
3. Our beginning salary for Bachelor Degree is \$19,000, plus retirement and 1/3 individual health/accident insurance. (no change)
4. There are too many reforms that are not needed. The cost to the school districts does not figure in the added costs of teacher retirement.
5. Lack of money in the bill now compared to the original projections (somewhat more opposed now).
6. Too little too late (somewhat more opposed now).
7. Increased funding (somewhat more supportive now).
8. Why penalize the older teachers (much more opposed now).
9. The mandated salary increases to small western Okla. schools will be devastating (much more opposed now).
10. People trying to undo HB 1017 (much more supportive now).

In reference to the minimum salary schedule issue, please provide any comments you wish.

1. Since it wasn't earmarked, I think it will be used for other things as has been done in the past.
2. The schedule should help equalize school expenditures.
3. I just hope the money is there three to five years from now to fund it.
4. Not enough funds are available for our district to the 5 year mandated raise. Staff will have to be reduced to

fund raises.

5. More emphasis on merit pay than guaranteed amount for year and degree.
6. Because of the increased expenses this might starve out small rural schools. I am not in favor of this but on the other hand, teachers needed a raise in salary after all the requirements placed on them to become teachers since HB 1706 was passed in the early '80s.
7. No provisions were made to match Social Security or increased retirement costs. Previous legislation will also increase fringe benefit costs in the area of health insurance.
8. I still feel the salary schedule should address teachers from 16 to 30 years. If we truly believe in keeping experienced quality people we would treat them as if we felt they mattered.
9. The future funding of the minimum salary schedule is an enormous problem based on uncertainties.
10. I am for increased salaries for teachers, however monies should be there to fund them.
11. Salary schedule was misrepresented by many pro 1017 supporters as an across the board pay raise for all teachers regardless of district pay level and level of experience.
12. I, like many others, question whether there will be enough money to fund the salary schedule. Our district can't get past next year ('91-'92) without the raise being fully funded.
13. It must be fully funded or other reforms will suffer seriously.
14. I've been an advocate of letting each district negotiate and contract on an individual basis for 20 years, and I still favor that.
15. It will help keep good teachers in Oklahoma.
16. The general public already has the misconception that HB 1017 is nothing but a salary and tax increase. Educators are currently viewed by many as overpaid/underworked. Jackasses such as the STOP people continue to feed this view.
17. Minimum salary schedule put into law have always had very little impact on education.

18. If funding does not increase our school will be unable to pay these salaries.
19. The impact is somewhat positive for school personnel. There may be a negative impact in terms of public opinion.
20. Fringe benefits could have been utilized. For example, a person in 28% tax bracket could only get 28% federal, 8% state, 11% retirement, 8.85% soc. security. 44.15% of the raises.
21. To get quality teachers they must receive decent pay.
22. I would like to have more flexibility in distribution of salary increases, i.e., career scales, etc. But I am well pleased with the infusion of new monies.
23. Salaries for teachers must increase.
24. Without the full amount first presented in the bill, it will be difficult for many districts to meet.
25. The increase in minimum salary schedule is a step toward closing the pay discrepancy for teachers in the State of Oklahoma.
26. "Good" teachers are underpaid. Many teachers are overpaid and would accept a huge pay cut because they have failed at other jobs.
27. The state had best be prepared to fund the mandated salary schedule or it will go for naught.
28. Five years from now, Oklahoma teachers will be as far behind national norms as they are today. The bill doesn't go far enough or soon enough.
29. HB 1017 mandates money that has to be spend by school but does not allow enough funding to accomplish the mandates. HB 1017 is nothing but a consolidation bill.
30. I feel that teachers deserve the raise they are to receive. They are professionals and have received their degrees and education to warrant their salary.
31. I agree that teachers need a nice raise such as this, but our district will be put into a real bind to implement the 2nd year's raises since we are not scheduled to receive any new funds.
32. Needed to happen a long time ago.

On the issue of accreditation standards, what factors have caused your position to change?

1. No change. If funded I think it is great.
2. Better understanding of provisions (somewhat more supportive now).
3. I thought it would lead to "voluntary" consolidation, and I still do.
4. Increased funding (somewhat more supportive now)

Please provide any comments you wish regarding accreditation standards.

1. Fund, and we will meet the standards.
2. Improved libraries, counseling, and class size limitations will provide better learning environments.
3. I disagree that adopting North Central standards is consistent with an output focus on education.
4. My main problem with this and many other regulations is that we spend more time in education trying to comply with a multitude of regulations than we do educating boys and girls.
5. Our school meets and exceeds all accreditation standards in 1017.
6. Minimum standards were needing to be raised - good move!
7. I do not think it will improve the quality of the product coming out of our public schools but it will cost some schools money to put in place these standards.
8. I believe in high standards, but tying them to North Central was not necessary.
9. These standards must be applied to individual metropolitan schools, not to overall districts, if we are to be judged fairly.
10. The proposed minimum accrediting standards have not been addressed adequately in the funding plan. This will impede seriously, its implementation.
11. I think the timeline for accreditation standards is too long. Changes should be made more quickly.
12. Any effort to initiate/upgrade that is feasible should

be pursued.

13. The 20-1 PTR (pupil-teacher ratio) isn't realistic in view of the money available.
14. Too little clarity - too many committees which will further bureaucracy, give meaningless regulations, and create loopholes that will be detrimental to the intent of higher standards.
15. If proper training, follow up and support services are forthcoming it will be great. In the absence of those services it will be a disaster.
16. I feel that this will only be used for forced consolidation.
17. I am for accreditation standards, however, I believe ample monies should be there to fund these standards.
18. There is no excuse for sub-par schools.
19. Needs to be stronger and occur sooner.
20. It is my opinion that education is not the problem. It is social problems that affect us; sexual abuse, child abuse, drug abuse, lack of morals, lack of character, lack of want to, and parents and teachers that don't care that much about the total student. We must address these deficiencies before we need to worry about academic standards.
21. They serve to point out the tremendous chasm that currently exists between school systems within our state. Equitable funding for schools is a must!
22. My position may well change when I see what new rules and regulations come out of the SDE.
23. Planners need more input from teachers and administrators doing the work and making the changes.
24. I feel it is a mistake to tie state accreditation to North Central. If it was (is) it should be so that NCA accredited schools were deregulated.
25. Accreditation standards and quality education for students -- is there a correlation?
26. We owe our very best to our students.
27. Public school are the goat for the other problems of society and especially the family.



28. Minimum accreditation standards of HB 1017 will force annexation or consolidation of most class B schools.
29. I believe schools should be NCA.
30. I have not received the new accreditation regulations as of yet to make a decision.
31. We can meet the new standards by getting some of our existing staff members who are part time to become certified in the needed areas. It will cost us a little, but we can do that easier than grant the salary increases.
32. I've been trying to get my board of education to become NC for 5 years.
33. I have no problems with new standards. However, I have problems with North Central standards. These standards are more input oriented. This is opposite of the output base concept which the bill emphasizes. Also, if schools are allowed flexibility in meeting HB 1017 accreditation standards, schools will meet these standards. If not, schools may and will have problems.

What factors have caused your position to change in reference to the common school fund?

1. I changed from a school district which was going to be hurt by the provisions to one that it helped.
2. Salaries have accelerated - state aid has not. More to do (mandated) on less money.
3. It has become strictly a divisive educational issue and is pitting Eastern v. Western Oklahoma and big schools against little schools. This is destructive.
4. Failure of the equalization bills in June. We do not have equity in state funding.
5. Increased funding (somewhat more supportive).

Relative to the common school fund, please provide any comments you wish.

1. I don't think HB 1017 divides the money the way it should be. I think all monies should be divided by ADM.
2. With the failure of the state question, this provision of HB 1017 is inoperative and in violation of constitutional law. If a common school fund is to be installed, a

common ad valorem tax assessment should also be installed simultaneously.

3. Devastating to small schools.
4. [The common school fund] will go a long way toward equal funding for Oklahoma schools.
5. It seems to me that when you send money to Big Brother, you don't get it all back!
6. The sparsity factor must remain in the formula. Dependent school transfer fees are a waste of paperwork and time.
7. The local assessment and ratio needs to be equalized across the state and evaluation of property should be addressed.
8. Equalization of funding should be a basic mandate.
9. Same fear - not enough money for the long haul!
10. One cannot improve by dragging someone down. It must be accomplished by attaining their level. A few schools would be seriously hurt and the rest receive insignificant increases which would in turn be chargeable against state aid. Thus some are hurt, none are helped.
11. The allowable percent carry-over should have been a formula that included district valuation because in many districts carry-over is what makes up the money gap between bond money and building costs.
12. The common school fund is a misnomer for transfer of funds from rural to urban areas. If you want true equity, go to full state funding.
13. Needs to be done.
14. We need to continue an effort to equalize funding for all students.
15. Must address the differences in ad valorem tax assessments and quit penalizing schools whose districts have been assessed by taking away state aid.
16. We must continue to strive toward equitable funding for all school children.
17. Equitable funding must be a goal of funding.
18. We need full state funding - equality - sliding scale due to size and/or location (isolation).

19. Taking local support away from school takes away local incentive. Taking away local pride, incentive, support and control is in direct opposition to the American way.
20. I was disappointed when the state questions failed.
21. Common school fund cannot be accomplished without a positive statewide vote!
22. Hold harmless schools will always have a problem with the common school fund because they will never receive any new or additional money. It all goes in the common school fund.
23. I feel there needs to be a strong push for equal education throughout the state (equal funding).
24. Make the counties which are assessing property too low raise those values. That would provide more local funds for schools without penalizing schools in counties which have higher property values. Besides, everyone in our state is free to move to some other school district or county if they really want to.
25. We received notice of some additional funds, but smaller schools in Logan County received larger amounts.
26. The state questions failed because of the lack of available information.

On the issue of the Oklahoma Curriculum Committee, what factors have caused your position to change?

1. The committee seems to be moving toward a college bound curriculum that may not be appropriate for all.
2. The appointment of Dr. Nancy O'Brian to chair the committee (more supportive now).

Please provide any comments you wish relative to the Oklahoma Curriculum Committee provision.

1. If clear, unduplicated learning objectives are presented so teachers become aware of expectations to be gauged by the Okla. testing program, some good will have been gained.
2. I'm going to wait and see what changes occur as a result of this committee before I judge it.
3. Some local control needs to be maintained over curriculum offerings in the school districts of Oklahoma.

4. I do not believe our education in Oklahoma is in a crisis as the media would indicate. I would like to know who determines the crisis, other than a report "A Nation at Risk" which may or may not be valid.
5. I reserve judgment until I see their report.
6. We have in place an ongoing curriculum review committee.
7. Curriculum must match state testing which will allow teachers and administrators to have a solid base for accountability and evaluation.
8. Can only be for the better - I do feel it is time for the North Central to make some changes toward more realistic standards. Example: NC's class size standard (secondary) is too high.
9. No basis for evaluation. The jury is still out. Ask me five years from now!
10. I don't need anymore bureaucrats. I don't want anymore people responsible to see that we do our job. They get in the way when we want to make positive, proven changes for the benefit of the students. I'm sorry, but this one will prove no different.
11. Our school district has a very good record on achievement test scores. We believe we can do a better job of teaching if we are allowed to do it our way. We believe in the total student thereby raising scores through self esteem and discipline. We are finding ourselves with less time to concentrate on these areas that we feel are so important.
12. I prefer to withhold judgement on this provision until I see the results of the committee's work.
13. My position may change when I see all recommendations from the committee.
14. Parents and community attitude make good schools, not the Oklahoma Curriculum Committee.
15. School comparison is negative. It is okay to measure how your district is doing, but to compare and rank puts a lot of stress on teachers and communities.
16. It seems to me that the curriculum committee is just a "show" and that the State Department of Education could and has been improving curriculum in schools where it is needed. This seems to be a duplication of effort.

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VITA

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