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THE UNIVERSITY OF OKLAHOMA

GRADUATE COLLEGE

A PLAN FOR A STATEWIDE NETWORK OF REGIONAL INTERMEDIATE  
EDUCATIONAL CENTERS FOR THE STATE OF OKLAHOMA

A DISSERTATION

SUBMITTED TO THE GRADUATE FACULTY

in partial fulfillment of the requirements for the

degree of

DOCTOR OF EDUCATION

BY

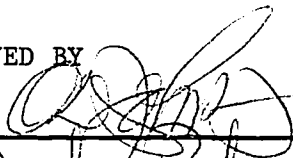
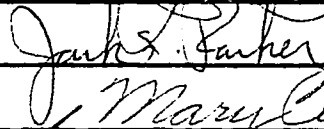

LEONARD DALE HALL

Edmond, Oklahoma

1970

A PLAN FOR A STATEWIDE NETWORK OF REGIONAL INTERMEDIATE  
EDUCATIONAL CENTERS FOR THE STATE OF OKLAHOMA

APPROVED BY

  
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## TABLE OF CONTENTS

	Page
TABLE OF FIGURES . . . . .	vi
 Chapter	
I. INTRODUCTION . . . . .	1
Background, Need, and Purpose of the Study . . . . .	1
The Problem . . . . .	12
The Data . . . . .	13
The Method of Research . . . . .	14
Organization of the Report . . . . .	15
II. A REVIEW OF THE LITERATURE . . . . .	16
The Development of the Intermediate Unit in the United States . . . . .	16
The Status of the Intermediate Unit in the United States	24
The Need for the Intermediate Unit in the United States	27
Organization, Services and Financing of Regional Intermediate Units of Education . . . . .	31
III. REVIEW OF THE DEVELOPMENT OF REGIONAL INTERMEDIATE EDUCATIONAL UNITS IN SELECTED STATES . . . . .	47
Colorado . . . . .	47
Iowa . . . . .	51
Michigan . . . . .	53
Nebraska . . . . .	57
New Jersey . . . . .	60
New York . . . . .	66
Oregon . . . . .	70
Pennsylvania . . . . .	72
Texas . . . . .	75
Washington . . . . .	79
Wisconsin . . . . .	82
Wyoming . . . . .	88
Summary of Implementation Procedures in the Respective States . . . . .	89
IV. SURVEY OF STATE PRACTICES RELATING TO REGIONAL EDUCATION CENTERS . . . . .	97
Organization and Control . . . . .	98
Programs and Services of Regional Units . . . . .	120

# TABLE OF CONTENTS--Continued

Chapter	Page
Financing of Regional Educational Centers . . . . .	128
V. CRITERIA FOR REGIONAL INTERMEDIATE EDUCATIONAL CENTERS FOR OKLAHOMA . . . . .	143
VI. STATE PLAN FOR A NETWORK OF REGIONAL INTERMEDIATE EDUCATIONAL CENTERS FOR OKLAHOMA . . . . .	165
VII. SUMMARY, CONCLUSIONS, AND RECOMMENDATIONS . . . . .	181
Summary . . . . .	181
Conclusions . . . . .	190
Recommendations . . . . .	191
BIBLIOGRAPHY . . . . .	193
APPENDICES . . . . .	200

## TABLE OF FIGURES

Figure	Page
1. Practices Relating to Methods of Selecting Governing Boards of Regional Educational Centers in Selected States, and Judgments of State Respondents as to the Effectiveness of These Practices, Expressed in Percentages . . . . .	99
2. Practices Relating to Number of Members on the Governing Boards of Regional Educational Centers in Selected States, and Judgments of State Respondents as to the Effectiveness of These Practices, Expressed in Percentages . . . . .	101
3. Practices Relating to Number of Members on the Advisory Boards of Regional Educational Centers in Selected States, and Judgments of State Respondents as to the Effectiveness of These Practices, Expressed in Percentages . . . . .	103
4. Practices Relating to Methods of Selecting Advisory Board Members of Regional Educational Centers in Selected States and Judgments of State Respondents as to the Effectiveness of These Practices, Expressed in Percentages . . . . .	105
5. Practices Relating to Membership in Regional Educational Centers by Public School Districts in Selected States, and Judgments of State Respondents as to the Effectiveness of These Practices, Expressed in Percentages . . . . .	106
6. Practices Relating to Provisions for Large Districts Joining Regional Educational Centers in Selected States, and Judgments of State Respondents as to the Effectiveness of These Practices, Expressed in Percentages . . . . .	108
7. Practices Relating to Provisions for Withdrawing from Regional Educational Centers by Member Districts in Selected States, and Judgments of State Respondents as to the Effectiveness of These Practices, Expressed in Percentages . . . . .	110
8. Practices Relating to Criteria Used in Establishing Regional Educational Centers in Selected States, and Judgments of State Respondents as to the Effectiveness of These Practices, Expressed in Percentages . . . . .	111



# TABLE OF FIGURES--Continued

Figure	Page
9. Practices Relating to Salary Schedules and Fringe Benefits of Employees of Regional Educational Centers in Selected States, and Judgments of State Respondents as to the Effectiveness of These Practices, Expressed in Percentages	113
10. Practices Relating to Methods of Selecting the Executive Director of Regional Educational Centers in Selected States, and Judgments of State Respondents as to the Effectiveness of These Practices, Expressed in Percentages	115
11. Practices Relating to Determining Salary Range of Executive Director of Regional Educational Centers in Selected States, and Judgment of State Respondents as to the Effectiveness of These Practices, Expressed in Percentages . . . . .	116
12. Practices Relating to Direction of Basic Responsibility of Regional Educational Centers in Selected States, and Judgments of State Respondents as to the Effectiveness of These Practices, Expressed in Percentages . . . . .	118
13. Practices Relating to State Legislators Delegating Responsibility for Setting Up a Statewide Network of Regional Educational Centers in Selected States, and Judgments of State Respondents as to the Effectiveness of These Practices, Expressed in Percentages . . . . .	119
14. Practices Relating to Programs and Services Provided by Regional Educational Centers to Constituent Districts in Selected States, and Judgments of State Respondents as to the Effectiveness of These Practices, Expressed in Percentages . . . . .	121
15. Practices Relating to Initiation of Proposals for Programs and Services to be Provided by Regional Educational Centers in Selected States, and Judgments as to the Effectiveness of These Practices, Expressed in Percentages . . . . .	123
16. Practices Relating to Provisions for Regional Educational Centers to Contract for Programs and Services in Selected States, and Judgments of State Respondents as to the Effectiveness of These Practices, Expressed in Percentages	125
17. Practices Relating to Participation of Constituent Districts in Programs and Services Provided by Regional Educational Centers in Selected States and Judgments of State Respondents as to the Effectiveness of These Practices, Expressed in Percentages . . . . .	127

# TABLE OF FIGURES--Continued

	Page
Figure	
18. Practices Relating to Regional Educational Centers Providing Programs and Services to Constituent Districts in Selected States, and Judgments of State Respondents as to the Effectiveness of These Practices, Expressed in Percentages . . . . .	129
19. Practices Relating to Adoption of the Budget of Regional Educational Centers in Selected States, and Judgments of State Respondents as to the Effectiveness of These Practices, Expressed in Percentages . . . . .	130
20. Practices Relating to the Use of Revenue Raised by Tax Levied on Assessed Property of the Educational Center Area in Selected States, and Judgments of State Respondents as to the Effectiveness of These Practices, Expressed in Percentages . . . . .	132
21. Practices Relating to Bonded Indebtedness of Regional Educational Centers in Selected States, and Judgments of State Respondents as to the Effectiveness of These Practices, Expressed in Percentages . . . . .	133
22. Practices Relating to State Support in the Form of Grants to Regional Educational Centers in Selected States, and Judgments of State Respondents as to the Effectiveness of These Practices, Expressed in Percentages . . . . .	135
23. Practices Relating to State Support That is Based on Equalization and/or Incentive Program to Regional Educational Centers in Selected States, and Judgments of State Respondents as to the Effectiveness of These Practices, Expressed in Percentages . . . . .	136
24. Practices Relating to Administrative Expenditures of Regional Educational Centers That are Borne by Constituent Districts in Selected States, and Judgments of State Respondents as to the Effectiveness of These Practices, Expressed in Percentages . . . . .	138
25. Practices Relating to the Assessment of Costs for Programs and Services Among the Constituent Districts in Regional Educational Centers in Selected States, and Judgments of State Respondents as to the Effectiveness of These Practices, Expressed in Percentages . . . . .	139

TABLE OF FIGURES--Continued

	Page
Figure	
26. Practices Relating to Procedures for Applying for Federal Grants by Regional Educational Centers in Selected States and Judgments of State Respondents as to the Effectiveness of These Practices, Expressed in Percentages . . . . .	141
27. Regions Identified as Suitable for Regional Intermediate Educational Centers for Oklahoma . . . . .	177

A PLAN FOR A STATEWIDE NETWORK OF REGIONAL INTERMEDIATE  
EDUCATIONAL CENTERS FOR THE STATE OF OKLAHOMA

CHAPTER I

INTRODUCTION

The intermediate unit of school administration has played an important role in the history of public education in the United States. The traditional intermediate unit has been the office of County Superintendent of Schools. However, this unit is being phased out in many areas and a new type of intermediate unit is emerging. The new type of intermediate unit tends to be regional or multicounty and is largely service oriented with some state-delegated administrative functions. This study was concerned with the development of a state plan for Regional Educational Centers for the State of Oklahoma.

Background, Need, and Purpose

Background

There has been a great deal of interest expressed in Oklahoma in recent years about a system of Regional Educational Centers. Some leadership has been exerted from the County Superintendent's Association, the State Department of Education, and the Oklahoma State Legislature for a feasibility study on Regional Educational Centers for Oklahoma.

Even though Oklahoma has made progress in school district reorganization, many educational needs of children cannot be met on an

economical and effective basis by local districts. Also, it has become increasingly clear that the present county units are not meeting special needs of local school districts, and it is assumed that these needs cannot be met through a highly centralized office at the state level.

#### Limitation of Local School Districts in Oklahoma

The limitations of local school districts in Oklahoma stem in a large part from one or more of the following characteristics of many local school districts:

1. Inadequate enrollment size.
2. Deficiencies in educational programs and services.
3. Failures to make effective use of professional personnel.
4. Inadequate financial resources.

Nearly all of these characteristics are interrelated and this makes it difficult to determine the cause-and-effect relationship.

#### Inadequate Enrollment Size

The additional reorganization of local school districts creating larger administrative units will surely be beneficial, but will not necessarily create school districts of adequate size to provide many programs and services characterizing a comprehensive educational program.

For example, Knezevich said that unless all local school districts in the United States are organized with not less than 10,000 pupils enrolled there is justification for an intermediate unit concerned with educational services. Meager population in some parts of the country, coupled with the concern for local control, indicates that school

districts with less than 10,000 pupils will continue to exist.<sup>1</sup>

Purdy suggested that a school district should have an enrollment base of 15,000 to 20,000 to have an optimum district.<sup>2</sup> He also indicated a need for a regional intermediate unit when he said:

Two separate approaches seem to be evidenced in developments now taking place within the various states. One is the formation of local school districts of sufficient size that they will be as nearly able as possible to meet the educational needs of all pupils within the district. The second is based on the belief that it will not be possible in the foreseeable future to develop a system of local school districts of that size, and that, even if it were possible, it would not be desirable. The districts so formed would be of such size geographically that people would tend to lose their feeling of having some relationship to the administration of schools. This second approach would make local school districts as large as practicable, but allocate high cost and specialized functions to some type of regional or area agency.<sup>3</sup>

In 1967-68 Oklahoma had only five local school districts having 10,000 or more students enrolled.<sup>4</sup> Furthermore, it is doubtful if reorganization would allow many more school districts to reach the 10,000 figure. Even if substantial reorganization did take place in the near future, according to Fitzwater there will still be a need for a strong intermediate unit:

It is significant that the rapidly increasing size of suburban local districts, rather than resulting in an overall reduction in intermediate unit strength, has been accompanied by a marked expansion and

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<sup>1</sup>Stephen J. Knezevich, Administration of Public Education (New York: Harper and Brothers, 1962), p. 158.

<sup>2</sup>Ralph D. Purdy, "Forces Affecting Local District Reorganization," Journal on State School System Development, Vol. 1, No. 2 (Summer, 1967), pp. 87-88.

<sup>3</sup>Ibid.

<sup>4</sup>General Statistical Information by County, Finance Division, State Department of Education (Oklahoma City, Oklahoma, 1969), pages unnumbered.

higher degree of specialization in intermediate district functions and services.<sup>1</sup>

#### Deficiencies in Educational Programs and Services

One of the factors relating to size of enrollment is the comprehensiveness of course offerings. It is generally recognized that there is a direct relationship between the size of enrollment of high schools and the comprehensiveness of course offerings. A 1967 study by the State Board of Education revealed that Oklahoma had a large number of high schools that were offering less than 36 units of work.<sup>2</sup>

Another major deficiency of the educational program of many elementary and secondary schools is in the area of special services. The present-day educational program is complex, and requires the services of a large number of specialists and supportive programs and services. Yet, relatively few elementary and secondary schools are able to provide adequate guidance programs, elementary and secondary curriculum consultant services, special teachers for remedial classes, health services for exceptional children, and other needed programs and services. For example, in 1967-68 there were an estimated 84,532 handicapped children in Oklahoma. Of these only 47% (49,501) received special services suited to their needs.<sup>3</sup> Furthermore, in the same year Oklahoma had elementary

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<sup>1</sup>Charles O. Fitzwater, "Patterns and Trends in State School System Development," Journal on State School Systems Development, Vol. 1, No. 2 (Spring, 1967), p. 27.

<sup>2</sup>Accreditation Regulations and Studies, State Board of Education (Oklahoma City, Oklahoma, 1969), p. 5.

<sup>3</sup>Optimizing Educational Opportunity, State Board of Education (Oklahoma City, Oklahoma, 1969), pages unnumbered.

school guidance programs in 85 of the 705 school districts, with a total of only 15% of elementary students in the State receiving guidance services. Secondary school guidance programs were available in 223 of the State's secondary school districts, with a total of 85% of the secondary students receiving guidance services.<sup>1</sup>

#### Failure to Make Effective Use of Professional Personnel

One problem that is related to the size of enrollment in a school district is that of assigning professional personnel to full-time teaching assignments. A number of studies have shown that the assignment of high school teachers in their major subject areas is directly related to the size of enrollment of the high school. The larger the high school the more likely they will be assigned to teach in their major area.<sup>2</sup>

Another facet of this problem is the failure of many districts to provide in-service education for their professional staff. Local districts typically spend little money for the continuous in-service education of their professional personnel.

#### Inadequate Financial Resources

Nearly all aspects of public elementary and secondary education are related to financial support. Financial resources vary widely and equalization remains a problem in Oklahoma. The wide disparity in the ability to support education is evidenced, in part, by the range in the assessed valuation per pupil in average daily attendance among the counties of the state. For example, in 1967-68 Adair County had only \$1,818

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<sup>1</sup>Ibid.

<sup>2</sup>Accreditation Regulations and Studies, op. cit., p. 11.



assessed valuation per pupil in ADA as compared to \$26,927 in Beaver County. Also, there was a corresponding discrepancy in per pupil expenditure between counties and between school districts. Beaver County spent an average in 1968-69 of \$1,026 per pupil while Cleveland County spend only \$421. In individual school districts in 1967-68, the per pupil expenditures ranged from \$263 in the Timber Hill District in Craig County to \$2,555 in the Pearsonia District in Osage County. Further evidence of inequality was the range of teacher's salaries between counties and between school districts. The average teacher's salary in Johnson County in 1968-69 was \$5,965 and in Beaver County it was \$7,235. Dennison School District in McCurtain County had an average teacher's salary in 1968-69 of \$5,056 while Forgan School District in Beaver County had an average teacher's salary of \$7,889.<sup>1</sup>

Limitations of Existing County School Systems in  
Providing Services to Local School Districts

The major limitations of the existing county unit of school administration in Oklahoma to assist constituent local school districts in providing needed programs and services relate to (1) enrollment size, (2) professional personnel, and (3) programs and services.

In 1967-68 there were only 8 counties in Oklahoma that had more than 10,000 students in ADA.<sup>2</sup> This means that most of Oklahoma's county units have a limited number of professional personnel, which in turn limits the programs and services which can be provided to the local school districts.

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<sup>1</sup>General Statistical Information by County, op. cit., pages unnumbered.

<sup>2</sup>Ibid.

Fitzgerald studied the adequacy of Oklahoma counties to function as intermediate units of educational administration. He concluded that an intermediate unit should have at least 10,000 public school pupils to provide a maximum program of specialized educational services. One of his findings was that only a few counties could offer a maximum program and some of the counties were deemed totally inadequate to provide even a minimum program.<sup>1</sup>

Adams pointed out the need for a more desirable type of intermediate unit of educational administration for Oklahoma. He concluded that the county intermediate units in Oklahoma are not large enough to serve the local districts of the state. He recommended an intermediate unit that would be, in most cases, larger than a single county.<sup>2</sup>

The State Department Is Too Remote to Provide  
the Necessary Specialized Educational Programs  
and Services

Democratic educational administration requires that every function be performed by that unit of organization closest to the people which can carry it out with completeness, equity, and efficiency.<sup>3</sup>

Although the State Department of Education might assist in some aspects, it does not seem to be the logical organization to provide

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<sup>1</sup>J. C. Fitzgerald, "Adequacy of Intermediate School Districts in Oklahoma," (unpublished doctoral dissertation, Oklahoma Agricultural and Mechanical College, 1956), p. 87.

<sup>2</sup>James Avery Adams, "A Proposal for the Creation of Desirable Intermediate Units of Educational Administration for Oklahoma," (unpublished doctoral dissertation, Oklahoma State University, 1960), p. 12.

<sup>3</sup>Effective Intermediate Units--A Guide for Development (Washington, D. C.: Department of Rural Education, National Education Association, 1955), p. 5.

major assistance to local school districts in providing comprehensive programs of specialized educational programs and services.

The Need for Regional Educational Centers  
in Oklahoma

It is clear that educational programs and services for meeting identified educational needs must be provided. These programs and services should be provided from sources as near the local people as possible. Many of the local school districts in Oklahoma are limited in size and resources to provide a comprehensive school program. The county units as presently structured are, in a majority of instances, inadequate in size and resources to provide help to the local districts in the way of special programs and services. The State Department of Education is too remote from the people to be served to assist the local school districts in providing special programs and services.

The need exists for a different structural organization that can better utilize existing resources, develop new resources and provide programs and services that individual school districts can no longer, or have never provided. Regional Educational Centers seem to be the most feasible approach of overcoming present inadequacies and of providing essential educational opportunities for all students, while maintaining local control.

Regional Educational Agencies have the support of a number of professional organizations and agencies. Among these is the American Association of School Administrators which in 1967 adopted a resolution supporting intermediate educational service agencies.

The Association recognizes that the achievement of excellence in our public school programs requires competent curriculum leadership,

the services of clinical teams, programs designed for continuous staff development, an expanding range of instructional materials, media services, and many other programs dependent on highly specialized personnel, facilities, and equipment. It further recognizes that effective and economical provision of such services is beyond the capability of many local school districts. We therefore urge that administrators give serious attention to the establishment or strengthening of a series of intermediate educational service agencies designed as an integral part of the state system of public education while at the same time eliminating small and inefficient intermediate units.<sup>1</sup>

Isenberg, Director of the Department of Rural Education, National Education Association, sums up the advantages of the multidistrict agency in this manner:

The multidistrict area has unquestionably been utilized as a local education agency for complex and specialized educational functions. Its merit seems to be in its adaptability. It furnishes a large enough population base to permit the operation of effective programs. At the same time, its cooperative nature does not upset the existing school district structure. With such great advantages, even greater use of the multidistrict local education agency can be expected in the future.<sup>2</sup>

Regional Educational Agencies are supported by recent enactment and pending legislation in many states in all parts of the country. It is evident from an examination of activities in selected states there is widespread interest in the intermediate unit.

Wisconsin, which since 1947 has reduced its local districts from over 6,000 to 570 in 1965 abolished its 72 county intermediate districts and replaced them with 19 new Cooperative Educational Services Agencies.<sup>3</sup>

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<sup>1</sup>American Association of School Administrators, Official Report for 1967 (Washington, D. C.: AASA and NEA, 1967), p. 177.

<sup>2</sup>Robert M. Isenberg, "The Multidistrict Local Education Agency," Journal on State School Systems Development, Vol. 1, No. 4, (Winter, 1969), p. 258.

<sup>3</sup>Charles O. Fitzwater, "Patterns and Trends in State School System Development," op. cit., p. 28.

Michigan in 1962 enacted legislation requiring consolidation of county intermediate districts with a school membership of fewer than 5,000 pupils.<sup>1</sup>

Nebraska in 1965 provided for 19 new multicounty educational service units covering the entire state.<sup>2</sup>

Washington in 1965 adopted legislation requiring the State Board of Education to develop a statewide plan of enlarged intermediate units and prescribing adoption of the new units by vote of the local district boards in the counties involved in each proposal.<sup>3</sup>

Colorado in 1965 passed legislation allowing districts to join together to provide special programs and services through Boards of Cooperative Services.<sup>4</sup>

Iowa has legislation permitting county boards of education to merge two or more adjacent county intermediate districts subject to approval by the State Board.<sup>5</sup>

New York State has been consolidating its intermediate districts over the years and currently has a statewide network of 69 Boards of Cooperative Educational Services.<sup>6</sup>

At the direction of the State Legislature the Pennsylvania State Board of Education developed a statewide plan which calls for replacing the 66 county intermediate districts with 25 new intermediate units.<sup>7</sup>

In Ohio, a statewide study of school district organization, made at the direction of the State Legislature, has recommended replacement

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<sup>1</sup>Ibid.

<sup>2</sup>Ibid.

<sup>3</sup>Ibid., p. 30.

<sup>4</sup>Ibid.

<sup>5</sup>Ibid., p. 31.

<sup>6</sup>Ibid.

<sup>7</sup>Ibid., p. 32.

of the existing 88 county intermediate districts with a new intermediate pattern of area education districts.<sup>1</sup>

In Oregon, legislation is under consideration which would facilitate consolidation of county intermediate districts.<sup>2</sup>

#### Need

The need for this study is based on:

1. A general awareness of inadequacies of programs and services for boys and girls in the schools of Oklahoma.

2. A concern on the part of many people about the problem of wide differences in programs and services in the school districts in the state and a desire for a solution to this problem.

3. The growing belief that the regional approach offers a possible solution to the problem.

4. The weight of the opinions of professional educators in support of the regional unit concept.

5. The trend in other states which points to the merit of the regional approach.

6. The fact that there has been no recent research in Oklahoma on intermediate units.

7. The belief that if a network of Regional Intermediate Educational Centers is to be provided for Oklahoma it should be done in a systematical and logical manner.

8. The expectation that the results of this study may be helpful to other states contemplating changes in their educational structure.

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<sup>1</sup>Ibid.

<sup>2</sup>Ibid.

### Purpose

The basic purpose of this study is to determine if it would be feasible to establish Regional Intermediate Educational Centers for the State of Oklahoma in order to make comprehensive programs and services available to all school districts in the State.

### The Problem

Local school districts in Oklahoma are faced with the necessity of providing broader educational programs and services. Because of the limitations of wealth and pupil enrollments, many local districts are not able to provide a comprehensive school program. Many feel that a regional agency has the greatest potential for providing programs and services that individual school districts do not, and possibly cannot provide.

### Problem Statement

This study is concerned with the development of a state plan, based on validated criteria, for Regional Intermediate Educational Centers in Oklahoma. Specifically, it is proposed to (1) develop and validate criteria for Regional Intermediate Educational Centers, and (2) develop a state plan based on the validated criteria. The state plan will include (1) guidelines for the organization and control, for the programs and services to be provided, and for the financing of Regional Intermediate Educational Centers, and (2) guidelines for the implementation of the state plan.

### Basic Assumptions

The local school district will continue to be the basic unit of public school organization. Further reorganization will be accomplished

in Oklahoma but the need will remain for some type of intermediate unit.

#### Definition of Terms

School District.--The area that is under the supervision of a district board of education.

Attendance Unit.--A school attendance center is a subdivision of a school district. It comprises the geographical area and the population served by a school building.

Intermediate Unit.--An administrative agency, most commonly a county intermediate district structure, that functions between the state education agency and the local school district.

Regional Intermediate Educational Center.--A multidistrict or multicounty educational unit operating at a regional level giving coordination and providing services to local districts and serving as a link between local districts and the state department of education.

#### The Data

The primary data for this study were gathered from direct communications with state agencies and regional units and from their printed and duplicated publications. These were supplemented by information secured by questionnaires directed to selected state coordinators and selected executive directors of regional units. The secondary source materials were obtained from the related literature, position papers of professional educators, and selected materials from national, state, and regional agencies.



## The Method of Research

### Type of Research

Descriptive research was used in this study. McGrath, Jelinek, and Wochner indicate that the term "descriptive" is used both in method and as a technique. The data derived in descriptive research can be meaningful and helpful in diagnosing a situation or in proposing a new and better program. The same authors state that another pattern of the descriptive approach involves the production of a format for a program. This could be a syllabus, a course of study, a handbook, a treatise, a set of directives for operation, or a similar contribution.<sup>1</sup>

### Research Design and Procedure

The following procedure was used to facilitate this study:

1. Requests were made to selected states for copies of their guidelines and state plans for regional units. These were summarized.
2. Supplemental information was secured, by questionnaire, from selected state coordinators and selected executive directors of regional units. This questionnaire requested information on: (1) the state's current practices, (2) the effectiveness of the current practices, and (3) changes planned or needed to make the regional units more effective in that state.
3. Related professional literature was surveyed and summarized.
4. From the data received from the state plans, from the responses to the questionnaires, and from the related professional

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<sup>1</sup>G. D. McGrath, James J. Jelinek, and Raymond E. Wochner, Educational Research Methods (New York: The Ronald Press Company, 1963), pp. 78-81.

literature, the writer developed criteria for a state plan.

5. The criteria was validated by submitting them to a panel of professional educators, chosen from universities that have conducted studies on regional units, state departments of education that operate regional units, and executive directors of regional units.

6. A plan for Regional Intermediate Educational Centers was developed for Oklahoma using the validated criteria. The plan included (1) guidelines for the organization and control of Regional Intermediate Educational Centers, the programs and services of Regional Intermediate Centers, and the financing of Regional Intermediate Educational Centers, and (2) implementation of the state plan.

#### Organization of the Report

Chapter I is concerned with the background, need and purpose of the study; a statement of the problem; a description of the data; and an explanation of the type of research to be used and the procedure to be followed in the study. Chapter II includes a review of the related literature. Chapter III reviews the development of regional intermediate units in selected states. Chapter IV reports the data obtained from questionnaires that surveyed the state practices relating to regional intermediate units. Chapter V describes how the general criteria for Regional Intermediate Educational Centers were developed and validated. Chapter VI presents the state plan for a network of Regional Intermediate Educational Centers for Oklahoma. Chapter VII contains a brief summary and recommendations.

## CHAPTER II

### A REVIEW OF THE LITERATURE

The review of the literature was intended to survey the professional writings concerning the development, the present status, and the need for the intermediate unit in the United States. Further, it was intended to survey the professional writings on the characteristics, organization, services, and financing of intermediate units in the United States.

#### The Development of the Intermediate Unit

##### In the United States

The development of the public school systems in the United States necessitated the establishment of intermediate units.

##### Education, a State Function

The states' statutes regarding education were, in the beginning, usually permissive and allowed groups of people the privilege of forming local districts and levying taxes to support them. This permissive attitude, combined with a desire to keep administration close to the people, resulted in the development of many small school districts in the United States.<sup>1</sup>

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<sup>1</sup>Robert M. Isenberg, ed., The Community School and the Intermediate Unit, a yearbook prepared by the Department of Rural Education (Washington: National Education Association, 1954), pp. 25-26.

The states' responsibility for providing a system of general public education slowly and steadily evolved. Cubberley's account of the early developments bear this out.

In time, the national land-grants for public schools, which began with Ohio in 1802, came to exert a stimulating effect on the new states west of the Allegheny Mountains. . . . The creation of so-called "Literary Funds" was also begun by the older states to the east. The permanent school fund of New Jersey, from 1816; North Carolina, from 1825; Pennsylvania, from 1831; and Massachusetts, from 1834. It was sometime, however, before the demand for a system of public schools, to supplement, and in part displace the private, charity, and church schools of the time made itself felt. . . . It was not until after 1820 that the development of manufacturing, the extension of manhood suffrage, the action of labor unions, the rise of the many humanitarian movements, and the introduction of the Lancastrian system of instruction began to awaken a demand for public tax-supported schools, under the authority and partial support of the state. . . . Gradually, however, the people of the different states were converted to the idea of adopting public education as a state function, and state after state began to provide for tax-supported schools. . . .<sup>1</sup>

Cubberley, briefly commenting on later developments in public education, further describes this steady evolution.

The School Code of each of the states today represents an important historical development, and contains a large, important, and constantly expanding body of school law, while school legislation has become one of the important interests considered in each meeting of the legislature of the state. . . . As a result it may be stated to be today a settled conviction of the people of our different American states that the provision of a liberal system of free education for the children of the state is one of the most important duties of the state. . . . We of today conceive of free public education as a birthright of the child, on the one hand, and as an exercise of the State's<sup>2</sup> inherent right to self-preservation and improvement on the other.

Thus, state legislation concerning public, tax-supported education changed from permissive to mandatory, causing a need for a state

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<sup>1</sup>Elwood P. Cubberley, Public School Administration (New York: Houghton-Mifflin Company, 1916), pp. 8-10.

<sup>2</sup>Ibid., p. 12.

education agency. In 1912 New York created the office of Superintendent of Common Schools, the first such position in the United States. Other states soon followed in the creation of similar positions.<sup>1</sup> The duties of this state educational official at first were primarily clerical, statistical, and exhortatory. For example, he was responsible for looking after school lands; tabulating and editing statistical returns from townships, towns, or districts; apportioning state aid according to law; visiting different parts of the state to exhort people to establish or add to their schools; and stimulating school teachers and officers to improve the educational program.<sup>2</sup>

Another argument supporting the position that public education is a responsibility of the states has been given by Cooper:

The founding fathers of our country foresaw the essential need of an educated electorate and advocated the establishment of a system of free public schools everywhere in the nation. However, public education was regarded as a function of the individual states. In time, people in the different states came to accept the proposition that education was a state function and provisions were made for putting this important concept into action.

Among the most important of these provisions was the establishment of a chief state school officer to represent the state in educational matters. These officials were needed to promote the spread of public education, to see that the laws relating to schools were carried out, to collect and disseminate information about the schools, and to represent the state in its dealings with local school systems. In short, the duties of this state official were largely statistical, clerical and promotional in character.<sup>3</sup>

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<sup>1</sup>Ibid., p. 28.

<sup>2</sup>Ibid., p. 29.

<sup>3</sup>Shirley Cooper, ed., The County Superintendent of Schools in the United States, yearbook, National Education Association, Department of Rural Education (Washington, D. C.: National Education Association, Department of Rural Education, 1950), p. 30.

### Education, Delegated to the Local School District

State governments, in the beginning, delegated to the local communities the authority to establish and maintain public tax-supported schools because it was virtually impossible for states to actually operate school districts. The following statements show this development in American public education.

Education is a state function, and the state legislature must provide the means of conducting schools. In all states it has been found expedient and desirable to establish local units or subdivisions empowered to maintain and control schools. These local units are creatures and agencies of the state.

Although education is a function of the states it is obvious that no state can effectively administer its entire public educational system, and none has tried to do so. In keeping with the sociological development of the schools and a tradition of local self-government, the respective states have created subdivisions, or have placed responsibility on general governmental subdivisions already established to provide and administer public schools. Delegated authority and local autonomy and responsibility are characteristics of the public school system in every state in the Union.<sup>1</sup>

Edwards states:

In origin and development, the American public school system is a local institution. Beginning in the cooperation of neighbors to provide such education as they thought needful for their children, schools have always operated as community institutions. In legal theory, however, the public school is a state institution. . . . Power to maintain a system of public schools is an attribute of government in much the same sense as is police power, or the power to administer justice, or to maintain military forces, or to tax.<sup>2</sup>

Cubberley writes:

These early community efforts show how natural it was that the school district should become the unit for educational organization. . . .

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<sup>1</sup>National Commission on School District Reorganization, Your School District, (Washington: National Education Association, Department of Rural Education, 1948), p. 135.

<sup>2</sup>Newton Edwards, The Courts and the Public Schools (Chicago: The University of Chicago, 1941), p. 1.

As the schools developed, the smaller irregular school district, rather than the town or township, became the unit for educational organization and administration.<sup>1</sup>

In all of this development, however, it should be noted that the authority and power to develop have come from the state, and not, except secondarily, from the community. This is an important point to be kept in mind. The school district, the township, the village, the city and the county are all subordinate creations of the state, erected for the purpose of better local administration.<sup>2</sup>

With the development of state systems of education and the delegation by the state to local school districts, a need for an intermediate unit between the state and local level became apparent.

#### Developments Required the Establishment of an Intermediate Unit

The earliest demand seemed to be for a unit to oversee small districts, to direct the distribution of state funds within the area, to gather information for the state, and to provide certain services for the state.<sup>3</sup> Knezevich noted that it seemed apparent that the intermediate unit of public education was created to overcome some of the shortcomings in local school administrative units as the early functions of this office were primarily administrative, statistical, and supervisory.<sup>4</sup> In effect, the early role of the intermediate unit was that of an "arm" or "adjunct" of the state educational agency to feed statistical and supervisory reports to the state department, and to receive for distribution, to local districts, the school funds disbursed by a state agency.<sup>5</sup>

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<sup>1</sup>Cubberley, op. cit., p. 5.

<sup>2</sup>Ibid., p. 14.

<sup>3</sup>Edgar L. Morphet, Role L. Johns, and Theodore L. Reller, Educational Organization and Administration, 2nd Edition (Englewood Cliffs, New Jersey: Prentice-Hall, Inc., 1967), p. 276.

<sup>4</sup>Knezevich, op. cit., p. 153.

<sup>5</sup>Ibid.

McLure states that the intermediate school district superintendency originated with the creation of county governments. When states were first organized, the county was established as a local unit of government somewhat after the system in England. In America, as in England, the county unit is further broken down into subdivisions, the most common being the township. The county was regarded as a suitable geographical and legal territory for the general oversight and promotion of public education as for other functions of government.<sup>1</sup> This development is illustrated by the following:

State responsibilities for education could not be discharged effectively without maintaining contact with local district officials and the teachers. To meet this problem it was natural to turn to the county, a political unit for administrative and governmental affairs already existing. . . . The county school official, occupying an intermediate position between the state and the local districts, became an important link between the two. On the one hand he represented the state in its overseeing of local schools. On the other hand, he represented his county in channeling information back to the state concerning the schools within his jurisdiction. He was essentially an educational officer representing the county and state as distinct from the district trustees and the teachers.<sup>2</sup>

Cooper and Fitzwater present a similar view:

The intermediate district has been in existence in some form almost from the beginning of organized state school systems. With education clearly recognized and established as a state function and a marked tendency toward the development of small local districts to which responsibility was delegated for the direct operation of schools, the need for a level of administration in an intermediate position between the state government at the head of the school system and the local school district closest to the people was recognized as constitutions were adopted and state systems of public education began to form. Information relative to the condition of buildings, school population, enrollments, programs of study,

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<sup>1</sup>William P. McLure, The Intermediate Administrative School District in the United States (Urbana: The University of Illinois, 1956), p. 1.

<sup>2</sup>Cooper, op. cit., p. 31.



certification and expenditures was almost nonexistent. Without such knowledge, state superintendents of public instruction with their inadequate staffs faced an almost impossible task of giving constructive leadership in a state school system comprised of hundreds, and in many cases, thousands, of small local administrative units. The urgent need for gathering such data and compiling them into intelligible reports was an important factor in the early establishment of the intermediate level of school administration. But the need for this level of administration was by no means limited to gathering and compiling factual information and transmitting it to state departments of education. School lands that were gifts of the federal government had to be looked after. In many instances, there were state school funds to be apportioned and accounted for. Local school district boundary lines had to be established and the many inevitable controversies on school matters could not be taken to the state department for settlement. Furthermore, there was need for a school official more familiar with local school conditions than the state superintendent could possibly be to see that legal requirements concerning the organization and operation of schools became effective . . . . Clearly, the intermediate district began as an adjunct of the state level of school government--as a downward extension of administrative control. This level of school administration was established in response to felt needs in the administration of state school systems.<sup>1</sup>

Virtually the same view is given by Isenberg:

Because of the large number of school districts and the limited number of supervisory officers, it was virtually impossible for the state education departments to oversee the operation of the schools or even to determine whether or not the local school districts were complying with the minimum requirements established by law. There was an almost universal need for some decentralization and delegation of authority.<sup>2</sup>

The major purpose of the intermediate unit at the time it was first established was to assist the state department of education by visiting the schools in the intermediate area and supervising both the educational program and local school authorities. The duties of the intermediate superintendent included recording changes in district boundary lines, apportioning state funds to the districts, ascertaining that teachers employed possessed certificates, collecting data on expenditures, and attendance for each of the districts, and reporting this information to state officials. To a large degree the earliest intermediate school officer in most states was a clerk and statistical recorder, serving<sup>3</sup> as a means of communication between the state and local district.

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<sup>1</sup>Shirley Cooper and Charles O. Fitzwater, County School Administration (New York: Harper and Brothers, 1954), pp. 103-104.

<sup>2</sup>Isenberg, op. cit., p. 26.

<sup>3</sup>Ibid., p. 40.

The first county superintendent's office was created in Delaware in 1829 with other states following in rather rapid succession, so that by 1879 only four of the thirty-eight states had not yet established this office.<sup>1</sup> Several of the states, including Mississippi, California, Texas, Idaho, and Arizona, provided for the office of county superintendent of schools, abolished it, but reinstated it later. Maine, New Hampshire, New York, and Vermont at one time had county superintendents, but abolished them in favor of the superintendency district or the supervisory union as their intermediate unit. Connecticut, Massachusetts, and Rhode Island are the only states that have never had a school official representing the county as a whole.<sup>2</sup>

In recent years Cooper and Fitzwater have examined the evolution of the intermediate unit, and their conclusions are as follows:

1. Recognition of education as a state function coupled with a rapidly growing number of small local districts, created a need for an intermediate level of administration to facilitate communication between the state government and the local school units.
2. In the initial stages of development, the intermediate district was regarded, primarily, as an arm of the state department of education--as a downward extension of state control.
3. The development has been landmarked with evidence of the trend toward transfer of administrative functions from a lay board to a professional officer. Gradually, there has been a delineation of the functions of a professional school officer as compared with the functions of a lay board. Formulation of policy, expression of popular interest and desire and exercise of discretionary powers have come to be accepted as the rightful functions of the lay board. Execution of policy, performance of defined functions, giving technical and professional counsel and advice, and providing stimulating leadership have, on the other

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<sup>1</sup>Cooper, op. cit., p. 30.

<sup>2</sup>Cooper and Fitzwater, op. cit., p. 137. Since this writing Alaska and Hawaii would be added as states that have never had a county intermediate unit.

hand, come to be regarded as the appropriate functions of the professional school officer.

4. Progress has been slow because of the jealousy with which local districts have guarded the right to local control of the educational program and the resentment they have shown toward any development that looked like state encroachment on this right.
5. People have tended to place more and more responsibility on the intermediate district administrative officer as the educational program has developed.
6. With increasing complexity of educational problems, measures have been taken to gradually raise the prestige and qualifications of the intermediate district administrative officer.
7. As with every other phase of school government, the people have viewed the intermediate district as an implement of their own creation to be used by them in organizing and operating an educational program. When this implement has not served them well, it has been modified in an attempt to make it function better.
8. The intermediate district is essentially an administrative organization for serving rural people.<sup>1</sup>

#### The Status of the Intermediate Unit in the United States

In a recent article Fitzwater outlined the organizational structure of the intermediate unit in the United States.

1. Hawaii's structure is centralized, consisting of a single agency --the State Education Agency--which is responsible for direct administration and operation of all public schools in the state.
2. Seventeen states have a two-level structure consisting of the state education agency and the local school districts. This pattern is largely concentrated in the Southeast, but there is also a four-state cluster in the western part of the country. In 12 of these 17 states the county-unit type of local school district organization is predominant.
3. Thirty-two states currently have a three-level structure consisting of the state education agency, local school districts, and intermediate administrative units. In these 32 states most local school districts are smaller in area than counties, but

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<sup>1</sup>Ibid., pp. 108-109.

several states have a sizable number of local districts that are county units. The most prevalent type of intermediate administrative unit is the county, but as will be noted later recent years have brought a trend toward larger intermediate units.<sup>1</sup>

Fitzwater said that none of the three levels of school administrative agencies has been static either in function or in organization and that over the past few years each level has been undergoing the processes of evolution.<sup>2</sup> To this Morphet, Johns, and Reller agree and suggest that many states have not, as yet, determined the place and functions of the intermediate unit.<sup>3</sup> They also point out that recent developments and proposals suggest that intermediate units of the future in most states will probably be comprised of other than county-coterminous areas.<sup>4</sup>

Change is seen in Isenberg's suggestion that a new type of intermediate unit is evolving. He said that the new unit is multicounty and service oriented.<sup>5</sup> The type of unit that Isenberg suggested is evolving and being developed in many states. Stephens and Spiess in 1968 summed up recent changes in the intermediate structure in states that had made a change or were in the process of making changes.

1. Washington in 1965 enacted permissive legislation creating 15 new regional, multicounty service areas. In January of this year,

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<sup>1</sup>Charles O. Fitzwater, "Patterns and Trends in State School System Development," Journal on State School Systems Development, Vol. 1, Number 1, (Spring, 1967) p. 6.

<sup>2</sup>Ibid.

<sup>3</sup>Morphet, Johns, and Reller, op. cit., p. 281.

<sup>4</sup>Ibid., p. 280.

<sup>5</sup>Robert M. Isenberg, "The Evolving Intermediate Unit," Proceedings of Conference on School District Reorganization and the Intermediate Service Unit, (April, 1966), p. 21.

(1968), six units had been formed. Efforts were exerted in the past (1967) legislative session to mandate the creation of the remaining nine districts.

2. Oregon in 1963 enacted legislation which changed the functions of single county Intermediate Units from that which was essentially supervision and control to an emphasis upon a broad range of responsibilities and services to both local school districts and the state education agency.
3. The past session of the California legislature also greatly strengthened the county unit. Predictions are that sixteen to nineteen service units will be created in California in the very near future.

Midwestern states, including Nebraska, Wisconsin, Illinois, Michigan, Ohio, and Iowa, have also taken significant action in recent years or are involved in study and planning:

1. Nebraska in 1965 passed legislation creating 19 Educational Service Units. With the opening of school this fall, 17 units were in various degrees of development.
2. Wisconsin in 1965 abolished the county school office and created 19 new State Cooperative Educational Service Units.
3. Michigan in 1961 passed legislation requiring counties of less than 5,000 students to merge with another county. There are now less than 60 Intermediate Units and this number will, it is safe to say, be greatly reduced within the near future.
4. In the state of Iowa, the Sixty-first Iowa General Assembly in 1965 enacted permissive legislation allowing two or more adjacent counties to merge by concurrent action of county boards of education. To date, three mergers involving eight of the former 99 single county school systems have taken place. There is considerable merger discussion in nearly all parts of the state.

In the East, New York and Pennsylvania have experienced considerable legislative activity relating to the Intermediate Unit--in all cases, action which would result in a strengthening of this unit.

These recent developments are illustrative of the current widespread analysis of state school systems, and, more specifically, of the recognized potential of the regional educational service agency concept as a means of improving and strengthening the state school system and education at all levels.<sup>1</sup>

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<sup>1</sup>E. R. Stephens, and John Spiess, "The Emerging Regional Educational Service Agency: The Newest Member of the Restructured State School System," Planning for School District Organization, The Great Plains School District Organization Project, (Lincoln, Nebraska, 1968) pp. 226-227.

The Need for the Intermediate Unit  
in the United States

Not all of the authorities agree that the intermediate unit is necessary. Campbell, Cunningham, and McPhee, suggested that in a sense, the intermediate unit is on trial and has always been on trial.<sup>1</sup> McLure made the observation that there have long been fundamental differences of opinion as to whether there should be an intermediate unit.<sup>2</sup> Van Miller was among the many writers who questioned the necessity of a middle-echelon educational agency.<sup>3</sup>

Alternatives to the Intermediate Unit

Campbell, Cunningham, and McPhee discussed the three alternatives to establishing intermediate units. One alternative to establishing intermediate units is organizing local districts into adequate units of school administration, wherever possible, with pupil enrollments in grades 1 through 12 of no less than 10,000 to 12,000 students.<sup>4</sup> However, there is no nationwide, or statewide, movement to reorganize local units in this manner.<sup>5</sup> Knezevich cites the sparse population in many states and the great concern for maintaining at least some semblance of a community district boundary as reasons for this type of reorganization

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<sup>1</sup>Ronald F. Campbell, Luvern L. Cunningham, and Roderick F. McPhee, The Organization and Control of American Schools (Columbus, Ohio: Charles E. Merrill Books, Inc., 1965), p. 116.

<sup>2</sup>McLure, loc. cit.

<sup>3</sup>Van Miller, The Public Administration of American School Systems (New York: The MacMillan Company, 1965), pp. 138-139.

<sup>4</sup>Campbell, Cunningham, and McPhee, op. cit., p. 116.

<sup>5</sup>Ibid.

never to take place.<sup>1</sup> Although much reorganization has taken place, a majority of all school districts in the United States continue to be relatively small and inadequate.<sup>2</sup>

A second alternative, if districts are to remain small and there is to be no intermediate unit, is a plan of cooperation among districts. One or more cooperative plans might be established. One wonders, however, if many cooperative plans will be fostered without the vision and encouragement of professional persons which, ordinarily, are not found in small rural districts.<sup>3</sup> Morphet, Johns, and Reller are among those who expressed doubts of mutual agreements among local districts working satisfactorily in the absence of an intermediate unit performing a coordinative function.<sup>4</sup>

The third possible alternative is the decentralization of the state department of education. Instead of establishing an intermediate unit of administration the state department might establish a number of regional offices throughout the state and equip each office with personnel who could provide services to local districts. This type program is hardly in keeping with local school development in this country.<sup>5</sup> Fears

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<sup>1</sup>Knezevich, op. cit., p. 159.

<sup>2</sup>American Association of School Administrators, School District Reorganization: Journey That Must Not End (Washington: AASA and NEA Department of Rural Education, 1962), pp. 2-3.

<sup>3</sup>Campbell, Cunningham, and McPhee, op. cit., p. 116.

<sup>4</sup>Morphet, Johns, and Reller, op. cit., pp. 280-281.

<sup>5</sup>Campbell, Cunningham, and McPhee, op. cit., p. 117.

of increased state control and the possibility that regional state department offices would not really meet local needs have been cited as arguments against such a proposal.<sup>1</sup>

Although many educators have been critical of the intermediate unit as it exists in most states, they have called for restructuring of the intermediate unit rather than abolishing it. These writers propose a regional or area service concept.<sup>2</sup> Somewhat typical of this group was Knezevich, who said "the office should not be abolished, but rather redesigned to perform a more vital role in educational administration."<sup>3</sup> Many other authorities have emphasized the necessity for a regional approach to intermediate restructuring and have predicted increased importance for intermediate units organized on a multicounty basis.<sup>4</sup> Fitzwater drew this conclusion and cited, in support of his position, recent regional intermediate legislation in Wisconsin, Michigan, Nebraska, Washington, and Oregon and pending legislation in several states including New York, Pennsylvania, Ohio, and Oregon.<sup>5</sup> Furthermore, Arthur D. Little, Incorporated stressed, after a complete study of California's System of Education, the ever-present need for "intermediate administration" for California, but pointed out that intermediate units

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<sup>1</sup>Morphet, Johns, and Reller, op. cit., pp. 280-281.

<sup>2</sup>The Multi-County Regional Educational Agency in Iowa (The Iowa Center for Educational Research in School Administration, College of Education, The University of Iowa, 1967), p. 61.

<sup>3</sup>Knezevich, op. cit., p. 93.

<sup>4</sup>The Multi-County Regional Educational Agency in Iowa, op. cit., pp. 2-3.

<sup>5</sup>Fitzwater, "Patterns and Trends in State School System Development," op. cit., pp. 28-32.



should no longer be based on county boundaries.<sup>1</sup> Similar suggestions were made by Pringle for Illinois,<sup>2</sup> Sabin for Oregon,<sup>3</sup> and Kooster for South Dakota.<sup>4</sup> Rhodes supported the regional intermediate unit when he said:

In the days when schools did little more than provide their pupils with teachers and textbooks, there was little need for the type of intermediate unit now developing. This was a time when education was relatively simple, the population limited, and the community each served was small. There was not much need for coordination among schools, little was known about the technical processes of teaching and learning, and curricula were narrow and limited. In such circumstances, each school could be quite self-sufficient. The intermediate unit was concerned primarily with liaison functions between local districts and state education agency.

But as education has become broader in scope, many additional services are demanded. Schools are now expected to deal with "all the children of all the people" and with all their learning problems. Ways must be found to make specialized services available to all who need them whether they live in a city, in suburbia, or in the open country. Furthermore, these services must be provided efficiently and at minimum cost.

Very few local school districts are able to provide all essential services for all children. This is as true in two-level state school systems as where there is a three-level system. Increasing educational demands call for a new kind of agency--more correctly a new role for an old agency. Without some type of intermediate unit, public education will be unable to meet the demands of today's world

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<sup>1</sup>Arthur D. Little, Inc., Emerging Requirements for Effective Leadership for California Education (Sacramento: California State Department of Education, November, 1964), p. 49.

<sup>2</sup>Robert Pringle, "A Proposal for a New Intermediate Administrative Structure for Education in Illinois," (unpublished doctoral dissertation, University of Illinois, Urbana, Illinois, 1964), p. 146.

<sup>3</sup>Robert C. Sabin, "A Survey of the Need for an Intermediate School District in Oregon with Implications for Its Future Development," (unpublished doctoral dissertation, University of Oregon, 1965), p. 429.

<sup>4</sup>Henry Koster, "The Future of the Intermediate Unit in South Dakota," (unpublished doctoral dissertation, University of South Dakota, 1968), p. 185.

for most communities. The alternative is failure to provide needed educational services.<sup>1</sup>

The Encyclopedia of Educational Research states that:

When a number of the separate and autonomous local districts, both large and small, share in a cooperative area-wide program, virtually all the services which previously have been available only in large urban school systems can be provided in an effective and defensible manner for all. The possibility of a wide range of specialized educational services without the requirement of "too large" local districts has caused a widespread interest in this new concept on intermediate functions. The types of functions now considered desirable at the intermediate level are: (a) providing educational leadership; (b) providing specialized educational services; (c) coordinating educational efforts among the various local districts within the intermediate district and between each of these local districts and the state.<sup>2</sup>

#### Organization, Services, and Financing of Regional Intermediate Units of Education

This section presents a review of the professional writings of educators on the organization and control, programs and services, and the financing of regional intermediate units, i.e., the characteristics of a good intermediate unit. However, Rhodes does suggest that:

There probably is no "best" design, no "best" operational framework, for an Intermediate Unit. As a distinct but integral part of a state school system, it cannot be designed apart from other segments. It is well designed only as it contributes to and reinforces each of the other administrative levels of the total structure.

Since state school systems differ in some respects and the circumstances in which educational programs are provided differ widely, variations in the organization and operation of Intermediate Units will undoubtedly be necessary, both within and among states. Yet,

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<sup>1</sup>Alvin E. Rhodes, Better Education Through Effective Intermediate Units (Washington, D. C.: Department of Rural Education, National Education Association), pp. 4-5.

<sup>2</sup>Walter S. Monroe, ed., Encyclopedia of Educational Research, 3rd Edition, 1960, p. 1200.

in spite of this need for variation and organizational flexibility, certain features characteristic of good Intermediate Units can be identified.<sup>1</sup>

Rhodes, along with others, identified some of these characteristics. First was an adequate service area. He suggested that three criteria be considered in determining the service area for the Intermediate Unit: (1) the service area should encompass a sufficient population to permit the efficient employment of specialized service personnel; (2) the service area should be sufficiently limited in size to facilitate travel and communication among school districts and between local school districts and the Intermediate Unit offices; and (3) the local school districts comprising the service area should have sufficient common interests to become a cooperating working force. Next he identified an elected lay board of education as the governing body of the Intermediate Unit. Thirdly, he suggested that the governing board select and appoint the executive officer of the Intermediate Unit and employ additional personnel upon the recommendation of the chief executive officer. Fourthly, he said that an Intermediate Unit must have definite and reliable financial support. This support should come from state, local, and intermediate area sources. Fifthly, he identified the functions of the Intermediate Unit as articulate functions, coordinative functions, and supplementary service functions. Finally, he said that there should be emphasis upon local determination. However, he suggested that the Intermediate Unit's functions and authority should be clearly defined in terms of the total educational system of which it is a part in order that there should be neither misunderstanding

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<sup>1</sup>Rhodes, op. cit., p. 9.

concerning its authority or any possible overlapping, duplication, or conflict between its responsibilities and those of the local school districts or the state education agency.<sup>1</sup>

Butterwoth has identified four characteristics of sound intermediate units: (1) there should be a board of education to represent the people of the intermediate district; (2) there should be a competent superintendent as the chief executive officer of the intermediate district; (3) there should be sufficiently clear definition of functions in the state law so that the intermediate district may confidently exercise leadership without fearing that it is interfering with local boards; and (4) there should be sufficient financial resources available to the intermediate district board, from state and intermediate district sources, to enable it to carry out its functions.<sup>2</sup>

Reller suggested these characteristics: (1) the purpose of the intermediate unit should be that of assisting the local school districts; (2) the governing board should be a popularly elected lay board; (3) the governing board should select the chief administrator of the intermediate unit; (4) the area of the intermediate unit should contain at least ten administrative units of adequate size; (5) there should be adequate financial resources supplied by the intermediate area and the state.<sup>3</sup>

Commenting on certain aspects of the intermediate unit, the Center for Coordinated Education said that it stood as a connective tissue

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<sup>1</sup>Ibid., pp. 9-13.

<sup>2</sup>Julian E. Butterworth, "Essentials of the Intermediate District," The Nation's Schools, Vol. 41, No. 5 (May, 1948), pp. 24-25.

<sup>3</sup>Theodore L. Reller, "The Characteristics of a Desirable Intermediate Unit," American School Board Journal (August, 1954), pp. 29-31.

between the local district and the state office; that it should not become either the appendage of a given district or the arm of a university department of education; that its boundaries must have an educational rather than a political logic; that it should be concerned with instructional coordination; that it should serve as an agent of change; and that its method of operation must be both divergent and inventive.<sup>1</sup>

The "Committee of Ten" reached the conclusion that intermediate units in California should be developed as a local education agency rather than a regional office of the State Department of Education. Furthermore, it should be governed by a locally elected lay board of education charged with appointing the executive officer, establishing and controlling the budget, and making policy. Such factors as population, distance, topography, road patterns, composition of the population, and certain social aspects should be considered in determining the intermediate unit area. It was decided by the committee that the intermediate unit functions primarily in a leadership and coordinative role but would provide certain services such as: (1) in-service education, (2) publication, (3) preparation of guides, (4) provisions of courses of study, (5) instructional materials services, (6) audiovisual services, (7) library services, (8) instructional television, (9) research, (10) pupil personnel services, (11) special education services, (12) data processing services, (13) cooperation with business and industry services, (14) unique functions services, and (15) business and

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<sup>1</sup>Center for Coordinated Education, Educational Change and the Intermediate Unit (Santa Barbara: Center for Coordinated Education), pp. 1-11.

administrative services. Sufficient funds should be appropriated by the state under a formula-in-law.<sup>1</sup>

Butterworth and Dawson said that the essentials of a good intermediate district were: a sufficient pupil enrollment that it will be possible to provide the desired offerings and services both effectively and economically; that it represent, as far as possible, a community of interests; that it be controlled by a board of education representative of the people of the intermediate area and they should not be a member of a local board; that there should be a staff attached to the intermediate unit's office adequate in number and qualifications to meet the needs of the district; clearly written laws defining the functions of the intermediate unit; commitment to concept of leadership; and financial support necessary to carry on its activities.<sup>2</sup>

The Department of Rural Education of the National Education Association prepared seven guides to be used in determining an effective organizational pattern for intermediate units. (1) Provision should be made for an intermediate unit board of education and an executive officer. (2) Provision should be made for the administrative participation of representatives of the community schools in the area. (3) Provision should be made for administrative coordination. (4) The intermediate area should be sufficiently large to assure a program of

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<sup>1</sup>California Association of County Superintendents of Schools and County Boards of Education: Section of California School Boards Association, "The Committee of Ten," The Future Role and Function, Size, Structure, and Organization of the Intermediate Unit in California (September, 1966), pp. 1-16.

<sup>2</sup>Butterworth and Dawson, op. cit., pp. 359-362.

services adequate to meet the unmet needs of community schools. (5) Provision should be made so that the structure can be adjusted to meet changing functions. (6) Provision should be made for cooperation among intermediate units. (7) Provision should be made for adequate financing of a program of services.<sup>1</sup>

The National Commission on Intermediate Units made the following observations about intermediate units. (1) The intermediate unit is not a substitute for local community school districts. (2) Local school districts are not subordinates of an intermediate unit. (3) Intermediate units should perform only those functions and provide only those services that local districts cannot perform or provide with comparable effectiveness. The functions are educational leadership, specialized services, and coordination. (4) The intermediate unit should be large enough to assure the effective and economical provision of the services needed to supplement what local community school districts cannot provide, yet small enough to facilitate communication, coordination, and sensitivity to local community differences. (5) The intermediate unit should have a board of education that appoints the executive officer, appoints the professional staff upon the recommendation of the executive officer, and should have the responsibility of determining the budget without review by an external reviewing board. (6) The structure of the intermediate unit should be flexible to allow for cooperation among intermediate units and for adjustment to meet changing functions, responsibilities, and circumstances. (7) The financing features should include support from the state's foundation program; distribution of

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<sup>1</sup>Isenberg, op. cit., pp. 197-198.

funds on an equalization basis; authority to rent, purchase, or build necessary buildings, and authority to levy taxes. (8) Each intermediate unit should provide a wide range of services to fit the needs of the local districts.<sup>1</sup>

Sabin developed a set of criteria for intermediate units in Oregon. He said that the functions, organization, and financing of the intermediate school district should be clearly defined and specified in the state law but be sufficiently flexible to allow adaptation to changing educational conditions and needs. He concluded that the basic responsibility of the intermediate district should be to the local districts with emphasis on the service function. The organizational structure of the intermediate school district should provide for (1) an elected lay board of education, (2) a qualified administrator who is appointed by the lay board, and (3) a qualified staff appointed by the board upon the recommendation of the intermediate district superintendent. Further, he said that all local school districts in the state should be included in some intermediate school district and that the intermediate school district should serve no fewer than five constituent local districts. His criteria called for financial support to come from the state and from the intermediate district area through a tax levy, and provisions whereby local school districts could contract for services not generally provided for all constituent districts. He concluded by saying that the intermediate school districts should comprise an area laid out to include a group of districts sufficiently compact and

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<sup>1</sup>National Commission on the Intermediate Administrative Unit, Effective Intermediate Units--A Guide for Development (Washington, D.C.: National Education Association, Department of Rural Education, 1955), pp. 3-12.



cohesive to have common interest; sufficiently large to present a real challenge to educational leadership; and with sufficient pupils to insure that educational services can be provided economically, efficiently, equitably, and completely. He specified the minimum, optimum and maximum number of pupils enrolled, number of teachers, total population, area in square miles and true cash valuation per pupil necessary for an adequate intermediate school district. These numbers are:

1. Pupil enrollment in grades 1 to 12--
  - Minimum - 4,000
  - Optimum - 15,000 to 25,000
  - Maximum - No limit
2. Teachers employed by districts included in the intermediate school district--
  - Minimum - 160
  - Optimum - 600 to 1,000
  - Maximum - No limit
3. Total population in the intermediate school district--
  - Minimum - 16,000
  - Optimum - 60,000 to 100,000
  - Maximum - No limit
4. Area in square miles--
  - Minimum - 500
  - Optimum - 2,000 to 5,000
  - Maximum - 12,000
5. True cash valuation per pupil enrolled in grades 1 to 12--
  - Minimum - \$10,000
  - Optimum - \$15,000
  - Maximum - No limit<sup>1</sup>

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<sup>1</sup>Sabin, "A Survey of the Need for an Intermediate School District in Oregon with Implications for Its Future Development," op. cit., pp. 414-415.

Pringle developed a set of criteria that he considered as guideposts to be used in establishing intermediate units in Illinois. (1) The intermediate unit should provide advisory and consultative services to local districts, supplement the programs of services offered by local school districts, and provide specialized educational services for children. (2) A minimum program of services to be offered by the intermediate unit should include the following areas: guidance, health, curriculum, special education, instructional supervision, administrative services, research, library, audiovisual, transportation, central purchasing, and adult and vocational education. (3) The organizational structure of the intermediate unit should be flexible to allow for changes that occur in education. (4) The governing body of the intermediate unit should be composed of from seven to nine lay individuals elected by the citizens whom they represent for staggered terms of from four to six years. (5) The governing board should appoint the superintendent of the intermediate unit and should appoint the staff upon the recommendation of the superintendent. (6) Financial support should come from intermediate district taxes, state funds, and contractual agreements with the local districts. (7) Specific criteria for Illinois included: (a) minimum student population of 25,000, (b) service area not to exceed 5,000 square miles with a maximum of 60 to 70 miles between the central office of the intermediate unit and the most distant attendance center, and (c) a minimum of \$250,000,000 assessed valuation of taxable property and a minimum of \$10,000 assessed valuation of taxable property per pupil.<sup>1</sup>

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<sup>1</sup>Pringle, "A Proposal for a New Intermediate Administrative Structure for Education in Illinois," op. cit., pp. 144-146.

Adams proposed the following as desirable for intermediate units in Oklahoma. (1) The purpose of the intermediate unit would be to provide educational leadership, specialized educational services, and coordination of educational services and efforts of local school districts. (2) Financial support should come from the state, the intermediate unit (which should have taxing powers), and local school districts contributing to the financing of the functions of the intermediate unit. (3) The intermediate unit should be under the control of an elected board of education that appoints the administrator. (4) The structure of the intermediate unit should be flexible. (5) The size of the intermediate unit should be an area with sufficient general and scholastic population to offer services economically and efficiently, large enough to provide challenging opportunities for educational leadership, and yet be socio-economically cohesive.<sup>1</sup>

One recent study said the following should be given consideration in the establishment and operation of regional units.

(1) The services of the center (program mix) should be highly specialized, never duplicating other operations in the state system, being highly complementary to local school efforts and closely supplementary to state-level operation.

(2) The services should be physically accessible to its constituents and should be accessible as a matter of right.

(3) The center should be financed with public funds.

(4) The constituency of the center should have a school population of at least 50,000 ADM.

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<sup>1</sup>Adams, "A Proposal for the Creation of Desirable Intermediate Units of Administration for Oklahoma," op. cit., pp. 51-52.

(5) The programs of the center must meet some standards: (a) must be appropriate for regional operation--not state or local level; (b) must be discreetly specialized; (c) must be necessary to the well-being of its educational constituents and the state system; (d) must offer the best in the way of sophisticated practice that technology and educational and para-educational disciplines have to offer.

(6) Staffing of the center should be based on a division of labor by specialty.

(7) The organization operating the center should be an integral part of the state system of schools.

(8) Institutional integrity is to be sought after in regional service centers.

(9) Formal arrangement must be made within the state system to require, or at least encourage the regional center to behave in a responsible and therefore serviceable and viable fashion.<sup>1</sup>

In a speech before the Illinois Association of County Superintendents of Schools in December, 1961, Roald F. Campbell listed criteria for an intermediate district.

(1) The major functions of the intermediate unit should be planning for local district reorganization and the location of school plants, supplemental financing the further equalization of educational opportunity, offering specialized instructional programs, providing specialized educational services such as psychiatric help to local districts, and providing educational leadership to local school districts.

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<sup>1</sup>Regional Educational Service Agency Prototypes, op. cit., pp. 75-77.

(2) Whenever possible, there should be a minimum enrollment of 10,000 pupils. An enrollment of 20,000 to 30,000 pupils would be better.

(3) There should be no required relationship between county boundaries and the boundaries of the intermediate units.

(4) The control of the intermediate unit should be under the direct control of an elected board of education, elected at large by the residents of the area. The board would adopt policy, appoint the superintendent, employ the necessary personnel upon recommendation of the superintendent, and appraise the effectiveness of the policies.

(5) An advisory committee to the intermediate board should be elected from the membership of the local district boards of education.

(6) The intermediate board should be fiscally independent. It should have independent taxing power and the authority to determine its own budget. State funds should also be made available to intermediate units. The intermediate board should have power to contract with local district boards for certain services.

(7) The intermediate superintendent should be a person with sufficient qualifications and competence to earn and deserve high professional recognition by administrators in all types of local school districts.

(8) The intermediate unit should be flexible in both structure and functions.<sup>1</sup>

Pound defined the proper functions and structure of the intermediate unit through a series of questions and answers.

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<sup>1</sup>Roy DeShane, "An Effective Intermediate Unit," --A New Role for an Old Agency, Illinois Education, 52:205-208 (January, 1964).

1. What are the functions that should be performed by the intermediate district?

a. As part of the framework of the state system, the intermediate district should provide leadership and serve as a coordinating agency between state and constituent districts.

b. It should provide special services to local districts in problems of attendance and guidance, supervision of instruction and curriculum, teaching aids, instruction for handicapped and homebound pupils, and health education.

c. The intermediate district should administer appellate functions assigned to it by law and directory functions assigned to it by the state.

2. Whom should the intermediate district serve?

All districts, children, within its geographic area.

3. What should be the structure of the intermediate district?

a. At least 4,000 to 5,000 pupils in the intermediate district.

b. Board of education to serve as its policy making body. Board should be representative of the people of the total area without undue influence from the constituent districts. Board should be composed of from five to seven members elected for a four-year term. Members could be nominated by a convention of representatives of the boards of the local districts. The board should appoint the staff and determine its budget.

4. What staff is needed for intermediate district functions?

Highest qualified people for superintendent, attendance work, supervision, and curriculum work. Other positions would be in the areas

of teaching aids, handicapped children, health, and clerical workers.

5. How should the districts be financed?

The area served, the local districts, and the state department allowing funds through the foundation program.<sup>1</sup>

Kosters recommended, for South Dakota, a new intermediate unit consisting of two, three, four, or more counties, in whole or in part. He recommended that the multicounty intermediate unit be service-oriented, charged with the responsibility to supplement the educational services and programs of the local school districts. Further, he recommended that provisions be made for (1) an elected intermediate unit board of education to provide and promote the development of educational policies and to maintain local control; (2) appointment of the chief administrative officer by the governing board; (3) an adequate financial base (local, state, and federal funds) should be provided to support the intermediate unit; (4) there should be an adequate number of pupils in the multicounty intermediate unit to insure economic efficiency in the provision of the desired educational services; (5) an advisory board, consisting of the chief administrator of each constituent local district; (6) the intermediate units to coordinate their efforts with the South Dakota State Department of Public Instruction to help local schools meet the standards and in developing better educational programs; (7) the intermediate unit to provide leadership and coordination of shared services between local school districts, between intermediate units and local school districts, and between intermediate units; (8) the size of the intermediate unit to be determined after consideration of topography,

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<sup>1</sup>Clarence A. Pound, "Is the Intermediate Superintendency Necessary?" The School Executive, (September, 1955), pp. 52-53.

distance, population, trade areas and centers, social unit, and the services to be provided; and (9) satellite centers to be established if the need arises.<sup>1</sup>

Turner said that intermediate school districts in Nebraska should be established by an act of the State Legislature with proper provision for a board of education, a superintendent, a staff and a source of financial support to provide necessary services to local school districts.<sup>2</sup>

Smith developed the following criteria to evaluate the intermediate unit in Minnesota and to recommend a plan of reorganization. (1) The intermediate unit should provide leadership and services to local schools; (2) encompass a logical combination of six to fifteen whole and defensible school districts; (3) contain a minimum of 10,000 public school pupils; (4) be governed by an elected board of education with authority to appoint a qualified superintendent and qualified staff; be fiscally independent; and (5) be flexible in structure.<sup>3</sup>

Coryell developed the following criteria for the reorganization of California's intermediate unit. (1) Each intermediate unit should serve a minimum of four local school districts; (2) each unit should have a minimum average daily attendance of 5,000 students; (3) the maximum distance from the unit office to a local school district office

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<sup>1</sup>Henry Koster, "The Future of the Intermediate Unit in South Dakota," (unpublished doctoral dissertation, University of South Dakota, 1968), pp. 185-188.

<sup>2</sup>Glenn Everett Turner, "The Location and Administration of Intermediate School Districts for the State of Nebraska," (Dissertation Abstracts, Vol. 20, Part 8, 1959), pp. 3168-3169.

<sup>3</sup>Frank Henry Smith, "An Evaluation of the Intermediate Unit of Public School Administration in Minnesota With a Plan of Reorganization," (Dissertation Abstracts, Vol. 22, Part 5, 1961), p. 1075.



should be eighty miles; (4) topographical considerations should be made when determining future intermediate units; and (5) each intermediate unit should have at least one institution within its boundaries that provides post-high school vocational and academic training.<sup>1</sup>

Stephens and his staff recommended the following for a Multi-county Regional Educational Service Agency in Iowa: (1) A minimum public school enrollment in grades K-12 of 30,000 students; (2) a minimum assessed valuation of \$300,000,000; (3) a maximum of one-hour driving time from the service center(s) to local public school districts in the area served; (4) a minimum total population of 100,000; (5) a minimum number of 1,200 professional personnel in the local public school districts in the area served; (6) the proposed role and function of multicounty regional educational service agencies--articulative functions, coordinative functions, and supplementary service functions; (7) an independent governing board chosen by public election for six-year terms. This board could consist of nine or eleven members. (8) Desirable characteristics of financing: (a) the governing board be responsible for determining and certifying its own budget, (b) fiscal independence and taxing power, (c) support from state aid, taxes, contractual agreements with local school districts, federal funds, foundation grants, and gifts, (d) regional units be prohibited from incurring bonded indebtedness, but allowed to rent and/or lease space or lease-purchase.<sup>2</sup>

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<sup>1</sup>Allen Keith Coryell, "A Quantitative and Qualitative Survey of Selected Services Offered by California's Intermediate School Administration Units and A Recommended Reorganization of These Units," (Dissertation Abstracts, Vol. 28, Part 1, 1966), p. 73-A.

<sup>2</sup>Multi-County Regional Educational Service Agency in Iowa, op. cit., pp. 365-369.

### CHAPTER III

#### REVIEW OF THE DEVELOPMENT OF REGIONAL INTERMEDIATE EDUCATIONAL UNITS IN SELECTED STATES

This chapter reviews the experiences of states which have established Regional Intermediate Educational Units, or which are taking positive steps toward their establishment. The chapter closes with a survey of the procedures followed in each state in implementing plans for regional centers.

##### Colorado

Colorado has 63 counties and for many years had 63 county superintendents of schools. When the average county had more than thirty districts, this office served many important functions. When they average less than three districts per county, serious questions are raised about the necessity of this office, especially when each local district has its own administrative staff.<sup>1</sup> A Constitutional amendment, which authorized counties to submit the question of abolition of the office of county superintendent to the voters in any general election, was passed and now more than half of the counties have voted the office out.<sup>2</sup>

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<sup>1</sup>Stanley A. Leftwich, "Colorado's Story on School Reorganization and Intermediate Unit," Proceedings of Conference on School District Reorganization and the Intermediate Service Unit, Department of Public Instruction, (Harrisburg, Pennsylvania, 1966), pp. 109-111.

<sup>2</sup>Ibid., p. 111.

Colorado passed laws in 1965 that allowed school districts to join together in cooperative programs. This act allowed the formation of the Board of Cooperative Services. Colorado feels that boards of cooperative services provide both an administrative unit for the expansion and development of education services through cooperative efforts and a safeguard for local board autonomy.<sup>1</sup>

The laws authorizing and controlling boards of cooperative services are as follows:

123-34-1. Short title.--This article may be cited as "The Boards of Cooperative Services Act of 1965."

123-34-2. Legislative declaration.--The general assembly hereby declares that this article is passed for the general improvement and expansion of educational services of the public schools in the state of Colorado for the creation of boards of cooperative services where feasible for purposes of enabling two or more school districts to cooperate in furnishing services authorized by law when such cooperation appears desirable; and for the setting forth of the powers and duties of said boards of cooperative services.

123-34-3. Creation of board of cooperative services.--(1) Whenever the boards of education of two or more school districts desire to establish a board of cooperative services for the purpose of providing cooperatively services as set forth in this article and have so certified to the commissioner of education and other interested boards by appropriate resolution, the presidents of any two of the interested boards may call a meeting of the duly appointed representatives of the interested boards. The interested boards shall seek from the commissioner of education and the state board for vocational education or its successor such aid and assistance as may be reasonably required, to the end that a proper plan of organization for the board of cooperative services and the necessary inclusion of school districts shall be accomplished. At this meeting the boards which have previously and respectively adopted resolutions so authorizing may enter into a proposed agreement to form a board of cooperative services, which proposed agreement shall set forth the names of the participating districts and such other items as may be required. The participating districts may then proceed to form the board of cooperative services.

(2) At a subsequent meeting, the boards which have approved participation in a board of cooperative services shall agree upon the

number of members which are to compose the cooperative board; except that there shall be no less than five members, and that each participating board is entitled to at least one member on the board of cooperative services. Each participating board shall then appoint its assigned number of representatives, and one alternate for each, from its membership. The term of office of each member shall have the same expiration date as the term which the member is serving on his local board at the time of his appointment to the board of cooperative services. As a term of office expires a replacement to the board of cooperative services shall be appointed by the participating board within thirty days after the expiration date. When other vacancies occur, they shall be filled by appointment by the respective boards within thirty days from the date on which the vacancy occurs.

(3) The agreement to establish a board of cooperative services may be amended to admit one or more additional districts if the additional district or districts certified by resolution their desire to be admitted, and if the board of cooperative services by resolution agrees to the admission.

(4) A board of cooperative services shall meet at least quarterly. A quorum shall consist of a simple majority of those members serving on a board of cooperative services. In the absence of a regular member, the alternate, if present, may be counted toward the required quorum and assume the prerogatives of the regular member.

123-34-4. Organization of board of cooperative services--meetings. --At its first meeting, the members of the board of cooperative services elected as set forth in section 123-34-3 shall proceed to elect from their membership a president, a vice-president, a secretary, and a treasurer, whose terms of office shall be for two years, unless their terms of office as school board members expire earlier, in which case the officership shall similarly expire. The duties of the president, vice-president, secretary, and treasurer of the board of cooperative services shall be the same as is set forth for similar offices of boards of education in sections 123-30-5, 123-30-6 and 123-30-7. Similarly, meetings of the board of cooperative services shall be called, held, and conducted as set forth in section 123-30-8.

123-34-5. Financing of services. --Financing of the services performed under the direction of the board of cooperative services shall be by contributions from available moneys in any funds, which may be legally expended for such services, of the participating school districts on the basis of a proportionality agreed upon by the boards of education of the participating school districts.

123-34-6. Duties of board of cooperative services. --In addition to any other duty required to be performed by law, the board of cooperative services shall have the same duties as those for boards of

education as set forth in subsections (2) through (14) inclusive, and (18) and (19) of section 123-30-9.

123-34-7. Powers of board of cooperative services.--(1) (a) In addition to any other powers granted by law, the board of cooperative services shall have the following specific powers, to be exercised in its judgment.

(b) To take and hold in the names of two or more participating districts so much real and personal property as may be reasonably necessary for any purpose authorized by law;

(c) Additionally, said board of cooperative services shall have the same powers as those set forth for boards of education in subsections (3) through (5), (8) through (13), (16), (19), (21) through (25), (27), and (29) of section 123-30-10, and in section 123-30-23, as amended.

123-34-8. Matching power.--The board of cooperative services shall be authorized to use the contributions from the participating school districts to match state and federal funds, or funds from any other agencies when applicable, when the acceptance of financial assistance from such other agencies requires matching of funds as a condition of participating in services authorized by law.

123-34-9. State and federal payments.--Any state or federal financial assistance which would accrue to an individual school district if it were performing a service performed under the direction of a board of cooperative services shall be apportioned by the appropriate state or federal agency to the participating school districts on the basis of the proportionality of the contributions of the participating school districts to the performance of the service, or upon the basis of proportionality otherwise set forth by law.

123-34-10. Buildings and facilities.--(1) A school district which is participating in a cooperative service agreement, when authorized by a vote of the qualified taxpaying electors as provided in Article 11 of chapter 123, C.R.S. 1963, may contract for bonded indebtedness for the purpose of purchasing sites, constructing buildings, or other structures, and equipping buildings which are necessary for the operation of a cooperative educational service program. The district which contracts for bonded indebtedness may charge the other school districts participating in the cooperative service agreement for the use of the building and equipment. The rental proceeds may be applied to the retirement of said bonded indebtedness. This article shall not be construed to create liability for retirement of such bonded indebtedness upon the other school districts participating in the cooperative service agreement.

(2) The boards of education of the school districts participating in a cooperative service agreement may jointly or separately construct, purchase, or lease sites, buildings, and equipment for the purpose of providing the facilities necessary for the operation of a cooperative service program at any appropriate location whether

within or without a school district providing the money for the facilities. School district moneys in any fund from which money may be legally expended for such facilities, may be used for carrying out the provisions of this section.

(3) The board of cooperative services, when authorized by a vote of the qualified taxpaying electors of all of the school districts participating in the agreement, may borrow any moneys available from the permanent school fund for purposes of purchasing sites and erecting buildings for use of the board of cooperative services. Repayment of such loans and interest thereon shall be by payments from the participating school districts on a proportion agreed upon by the boards of education of said participating school districts.

123-34-11. Veto power and dissolution.--(1) A participating board may refrain from participating in a specific activity proposed by the board of cooperative services by giving due notice through a board resolution as may be provided in the bylaws of the board of cooperative services.

(2) A participating board may withdraw from a board of cooperative services after having given due notice as provided in the bylaws of the board of cooperative services and after having satisfactorily completed all specific contracts to which it has become a party, or upon otherwise being released from its commitments by the board of cooperative services.

(3) A board of cooperative services may be dissolved by its resolution upon the completion of all contracts or upon other adequate discharge of its obligations.

123-34-12. Approval for post-secondary occupational programs.--No board of cooperative services shall establish a new post-secondary program of occupational education without first obtaining approval from the state board for community colleges and occupational education.<sup>1</sup>

#### Iowa

Iowa's county superintendency was created by an 1858 act of the legislature. The office was considered to be the educational leader and general supervisory officer of the many small districts not operating

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<sup>1</sup>Colorado School Laws, Article 34, Boards of Cooperative Services Act of 1965.

high schools.<sup>1</sup> A new role for the county superintendent was recognized, to some degree, in 1958 in the form of new legislation. An elected county board of education was permissive in allowing county offices to furnish requested educational programs and services to local school districts. Two or more county systems could provide services cooperatively, and two or more county systems could employ one superintendent to serve a multiple area. Thus, it was recognized through legislative action, that the broadened county school system should expand its programs and services.<sup>2</sup>

In 1965, significant legislation was passed, although the requested system of intermediate units was not mandated. As amended, House File 553 was approved and provided that (1) two or more adjacent counties may form a merged county school system, (2) the merged district shall have a single tax case, (3) a joint seven-member board of education shall act as the governing body, (4) the joint board shall have the authority to lease or rent office facilities, (5) the joint board shall have the authority to appoint advisory committees, (6) the joint board, with the approval of the State Board of Public Instruction, shall be authorized to provide courses and services for physically, mentally, and emotionally handicapped children; to provide special and remedial courses and services, and workshops; to lease, acquire, maintain, and operate such facilities and buildings as necessary to provide authorized courses and services; and to administer authorized programs; (7) the

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<sup>1</sup>The Multi-County Regional Educational Agency in Iowa, op. cit., p. 44.

<sup>2</sup>Ibid., p. 45.

joint board shall be authorized to make application for, accept, and spend state and federal funds; and (8) an election may be held in adjacent counties on the proposition of merging the counties into a single school system.<sup>1</sup>

### Michigan

In 1867 the Michigan legislature made legal provision for the creation of the elected office of county superintendent of schools. The major duties of the county superintendent were to include the certification of teachers, the visitation and inspection of schools, the promotion of teacher institutes, and enforcement of state rules and regulations.<sup>2</sup>

During the first fifty years of this century, the responsibilities of the State Department of Public Instruction increased as did the importance of the city superintendency. In this period, little if any change took place in the intermediate office. The stronger state department and the local districts were definitely at the forefront of education in Michigan. It appears safe to say that much of the work of the county commissioners was clerical.<sup>3</sup>

In 1937, this office began to be taken out of politics when Wayne County was given the authority to choose a county board of education through an electorate composed of the component local school

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<sup>1</sup>Ibid., p. 47.

<sup>2</sup>J. Alan Thomas, School Finance and Educational Opportunity in Michigan, (Lansing, Michigan: Michigan Department of Education, 1968), p. 307.

<sup>3</sup>Ibid.



districts. This county board in turn had the power to appoint a county superintendent. In 1947, this authorization was made to include all the counties.<sup>1</sup>

In 1962, the intermediate district was effected directly through Act 190 of the Public Acts of 1962. This abolished the office of county commissioner of schools, by creating the intermediate school district, and by providing the means whereby a maximum of three counties could combine into a larger intermediate school district. Counties with fewer than 5,000 school children, and where no special education programs were required, became part of a larger unit.<sup>2</sup>

Act 190 was amended in 1963, to authorize intermediate school districts to seek the support of voters in their constituent local districts for millage levies in order to finance special education programs.<sup>3</sup> Act 289, Public Acts of 1964, provided the intermediate school district with a key role in development plans for the reorganization of local school districts into strong K-12 units. A further amendment to Act 190 in 1964, permitted more than three counties to consolidate to form an intermediate district.<sup>4</sup> The passage of Act 21, Public Acts of 1966, gave permission to intermediate units to issue bonds for the construction of office and service buildings of their own. The legislature also approved a bill granting intermediate districts the right to finance the construction and maintenance of area vocational-technical facilities.<sup>5</sup>

With 83 counties, Michigan has 60 intermediate districts that include all of the operating local school districts in the state. The

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<sup>1</sup>Ibid.

<sup>2</sup>Ibid., p. 308.

<sup>3</sup>Ibid.

<sup>4</sup>Ibid.

<sup>5</sup>Ibid.

boundaries of the intermediate districts are no longer completely contiguous with county lines, since they are determined by the attendance boundaries of the constituent school districts. In consolidated intermediate school districts, the law permits board members to be elected by the voters in the district. In all other intermediate districts, board members are selected by the constituent local school districts. Intermediate school district superintendents in both consolidated and nonconsolidated intermediate school districts are selected and appointed by the intermediate district board.<sup>1</sup>

The success of the intermediate systems depends largely upon the nature of the professional personnel that it is able to recruit. Since much of the work of the intermediate system relates to the provision of programs and services which cannot be easily or efficiently provided at the local school district level, it is vital that highly competent intermediate educational leaders be identified and engaged. It is also crucial that leaders at the intermediate level be able to promote and maintain effective working relationships with personnel in the local school districts.<sup>2</sup>

In terms of the direct relationship with the local unit of school government, intermediate school districts normally carry on those activities which can be accomplished most advantageously by a regional approach. A recent statement prepared by the Michigan Association of Intermediate School Administrators has emphasized that:

Local and intermediate districts share the same relationship as the intermediate districts and the State Department of Education, in that neither is superior or subordinate; both work toward the

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<sup>1</sup>Ibid.

<sup>2</sup>Ibid., p. 311.

realization of common goals for school children. When these goals become too specialized for an individual district, when students become too few in a given area, or whenever the criteria of allocation of function is met in any part of the educational scheme, then the intermediate district becomes a useful partner to the local district.<sup>1</sup>

Special education appears to be receiving the most comprehensive attention in the districts examined. Unfortunately, many important services in such areas as guidance, clinical treatment (psychological, speech, reading, etc.), and data processing are not available to the smaller systems. It is also evident that the smaller local districts, which did not provide needed in-service education for their own professional personnel, receive minimal assistance in the way of subject matter and other consultants.<sup>2</sup>

The pupil enrollment in intermediate units is an important variable--the larger the system, the greater the extent and scope of program services available to the component local districts.<sup>3</sup> Further evidence of the variation among these organizational units appears when various aspects of location and physical facilities are considered. Without suitable housing, the task of providing high quality services is extremely difficult, if not impossible.<sup>4</sup>

At the present time, intermediate school districts in Michigan are financed through tax levying authority granted through legislation and, in addition, each such organizational unit is eligible for and receives state financial support.<sup>5</sup>

Thomas reported that the larger the organizational unit, the lower the per-pupil unit cost. Furthermore, the larger intermediate

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<sup>1</sup>Ibid., p. 314.

<sup>2</sup>Ibid., pp. 314-316.

<sup>3</sup>Ibid., pp. 316-317.

<sup>4</sup>Ibid.

<sup>5</sup>Ibid.

districts provide the more extensive services. In other words, larger districts provide a considerably greater scope of services at a lower cost.<sup>1</sup>

### Nebraska

The office of the County Superintendent has, since its organization, been primarily an arm of the State Department of Education. It has traditionally performed those statutory duties assigned to it as well as those duties assigned by the State Department of Education.<sup>2</sup> However, major change in Nebraska's intermediate unit organization came about in 1965 with the passing of Nebraska's Educational Service Unit Bill, L. B. 304. This gave Nebraska a dual system of intermediate units in the office of county superintendent and the multicounty educational service units.<sup>3</sup>

From 1954 to 1964, six doctoral dissertations were completed at the University of Nebraska in the study of the intermediate unit of school organization. These studies concluded, without exception, that an intermediate unit designed to provide supplementary educational services would, in Nebraska, need greater pupil population and more financial resources than most of Nebraska's counties could provide. Out of these studies came firm recommendations of a multicounty intermediate service unit which would be designed to provide supplementary educational services. At the same time, national research and trends were

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<sup>1</sup>Ibid., p. 318.

<sup>2</sup>William R. Schroeder, Great Plains School District Organization Project--Project Report for Nebraska, The Great Plains School District Organization Project, (Lincoln, Nebraska, 1968), p. 26.

<sup>3</sup>Ibid.

substantiating the research being done at the university. Out of the research in the national trends came the passage of Nebraska's Educational Service Unit Act of 1965.<sup>1</sup>

The provisions of Nebraska's Educational Service Unit bill, Article XXII, Nebraska Educational Service Units (L. B. No. 301, Session Laws 1965), are both specific and far-reaching. The legislature firmly established into law the 19 service areas and provided that all the territory in the state would be included in one of these units. The major provisions of the law are as follows:

79-2201. In order to provide supplementary educational services to local school districts, there are hereby established nineteen educational service units. The official name of such units shall be Educational Service Unit. No. \_\_\_\_ of the State of Nebraska, the individual number thereof to be determined as provided in section 79-2202.

Class IV and V school districts may be exempted from the geographical areas of the educational service units; provided, that within sixty days after the effective date of this act the boards of education of the existing Class IV and Class V school districts have requested the State Board of Education for such exemption.

79-2203 Amended--1967. (1) Each educational service unit shall be governed by a board to be known as the Board of Educational Service Unit No. \_\_\_\_\_. The educational service unit board shall consist of one member from each county and four members at large, all of whom are residents of the educational service unit, but no more than two of the members at large shall be appointed or elected from the same county unless any one county within the educational unit has a population in excess of one hundred fifty thousand inhabitants or the educational service unit consists of only one county.

(2) . . . If a majority of the voters voting on the issue (to exclude a whole county from the service unit) vote for exclusion, the county shall be excluded from the educational service unit.

(3) Any county which has been excluded from an educational service unit under the provisions of subsection (2) of this section may be readmitted thereto by the results of an election held under the provisions of such subsection.

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<sup>1</sup>Ibid., p. 26-27.

(4) Any local joint school district located in two or more counties and in two or more educational service units shall be considered a part of the educational service unit in which the greater number of school age children of such joint school district reside.

79-2204. Each board shall meet within ten days after its appointment by the Governor of Nebraska and organize by naming one of their members as president, one as vice-president, and one as secretary. It shall be the function of the board of the educational service unit to determine the participation of the educational service unit in providing supplementary educational services. If the board of the educational service unit does not provide supplementary educational services, it shall meet during each succeeding January to determine the participation in providing supplementary educational services for that calendar year.

79-2205. Each board of an educational service unit deciding to provide supplementary services shall appoint and fix the compensation and duties of an administrator, who shall be a person experienced in public school administration and who shall hold at least a standard administrative certificate. With the advice of the administrator, the board shall also employ and fix the compensation and duties of such professional and clerical assistants as shall be necessary.

79-2206. The board shall determine the location within the educational service unit of its principal office and may, if necessary for the performance of its duties under this act, establish one or more other offices at such locations as it shall determine within the educational service unit. The board may acquire office space by purchase out of funds appropriated to it for educational purposes or may rent or lease such space as may be necessary. The board shall also acquire the personal property necessary for the performance of its duties.

79-2207. The county treasurer or deputy of the county in which the principal office of the educational service unit is located shall be the ex officio treasurer of the board. He shall be the custodian of all funds of the board. He shall be the custodian of all funds of the board. He shall attend all meetings of the board when required to do so, shall prepare and submit in writing a monthly report of the state of its finances, and shall pay out money of the board only upon a warrant signed by the president, or in his absence by the vice-president, and countersigned by the secretary. He shall give bond, payable to the board, in such sum as the board shall determine conditioned for the faithful performance of his duties as treasurer of the board and for the safekeeping and proper disbursement of all funds of the board collected or received by him. Such bond shall be signed by a corporate surety company authorized to do business within this state. Such bond may be enlarged at any time the board deems such enlargement necessary or advisable. The cost of such bond shall be paid out of funds of the board.

79-2208. The board of each educational service unit in cooperation with local boards of education and school boards shall be responsible for (1) providing within its geographical area supplementary services such as guidance and counseling, remedial instruction, school health, adult education including area vocational technical schools, special education, and instructional material centers; (2) planning and coordinating educational services within its geographical area whenever such services are offered on a cooperating basis between local school districts; and (3) contracting for educational services with the board of any other educational service unit, any other educational agency, or with any appropriate state or federal officer or agency.

79-2209. The board of each educational service unit may receive, for the purpose for which made available, any county, state or federal funds made available to it, and may use tax revenue from the levy of the unit for operational expenses and for the purpose of matching any funds that may be made available to it on a matching basis by any state or federal agency, and may utilize such personnel or services that may lawfully be offered by any state or federal agency or governmental unit.

79-2210. The board for each educational service unit may levy a tax of not to exceed one mill on the dollar on the assessed valuation of all property except intangible property within its geographical unit. The amount of any such levy shall be certified by the secretary of the board to the county treasurer of each county within the educational service unit who shall collect the same as other taxes are collected and remit the proceeds therefrom to the county treasurer who is ex officio treasurer of the board.

79-2211. The State Board of Education acting as such or as the State Board of Vocational Education shall adopt necessary rules and regulations for initiating and administering the provisions of this act, which shall be in conformity with sections 79-328 and 79-1429, Reissue revised Statutes of Nebraska, 1943, and amendments thereto.

79-2212. Sections 79-2201 to 79-2212 shall be supplemental to any other laws and shall not affect the reorganization of school districts as provided in sections 79-426.01 to 79-426.19 and 79-426.22, Reissue Revised Statutes of Nebraska, 1943, and amendments thereto.<sup>1</sup>

#### New Jersey

In New Jersey, the office of County Superintendent is the traditional intermediate unit. However, a new law was passed in 1968, authorizing the establishment of Educational Services Commissions. This

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<sup>1</sup>Nebraska, Laws of Nebraska, L. B. 301, Session Laws 1965.

allows for one or more counties to petition the State Board of Education for permission to establish an Educational Services Commission to provide programs of educational research and administrative services to public school districts.

This act (Senate Bill No. 727, Laws of 1968) of Chapter 243, Laws of 1968, has the following provisions:

1. Definitions:

(a) "Educational Services Commission" means an agency established or to be established in one or more counties for the purpose of carrying on programs of educational research and development and providing to public school districts such educational and administrative services as may be authorized pursuant to rules of the State Board of Education.

(b) "Commission" means county educational services commission.

(c) "State board" means the State Board of Education.

(d) "Commissioner" means the Commissioner of Education.

(e) "Operation expenses" means those funds devoted to or required for the regular or ordinary operating expenses of the commission, including administrative, maintenance and salary expenses, and purchase or rental of real and personal property, but excluding contracted services expense.

(f) "Contracted services expense" means funds devoted to or required for services provided pursuant to contracts with school districts whether member districts of the Commission or not, or contracts with nonpublic schools.

(g) "Member district" means a public school district located in the county or counties in which a commission is established which is authorized by this act to be a constituent part of the Commission, to participate in the election of members of the governing body of the commission, and to contract with the Commission for one or more of its services.

2. Whenever 2 or more boards of education in any county or in any 2 or more counties and the Commissioner after study and investigation shall deem it advisable to establish a county educational services commission, such boards of education may petition the State Board of Education for permission to establish such a commission. A report shall be attached to such petition setting forth the kind or kinds of educational services which are deemed to be needed and proposed to be provided, an estimate of the cost of providing such



services, a method of financing the operation expenses of such commission until such can be financed under its first regularly adopted budget as provided in section 12, and any other data or information deemed pertinent.

The State board, after studying the petition and report, shall determine whether there is a need for such a commission and whether its operation is feasible. If the State board finds that the need exists and further finds that the operation of a commission will be feasible, it shall approve the petition and so notify the petitioning boards of education and the county superintendent or county superintendents of the county or counties, as the case may be, in which such boards of education are located.

3. Whenever the boards of education and the county superintendent or superintendents, as the case may be, receive notification that the State board approves the establishment of a commission, the county superintendent, or the county superintendents by agreement if more than one county is included, shall instruct each board of education to elect one of its members to serve on the board of directors of such commission, and shall fix a date and place for the first meeting of the said board of directors.

4. The first board of directors shall organize upon the call of the county superintendent or county superintendents, as the case may be. Thereafter the board of directors shall organize annually on the first Monday of October. The board of directors shall organize by electing a president and a vice-president, who shall serve until the next annual organization meeting.

5. The board of directors shall consist of one representative from each member board of education and the county superintendent or county superintendents, as the case may be, of the county or counties in which the member school districts are located. Each member of the board of directors shall have one vote.

6. Members of the board of directors representing school districts shall be elected by their respective boards of education from among the membership of such boards of education. Should a member cease to be a member of the board of education which elected him, his place on the board of education shall become vacant, and the board of education which elected him shall elect another of its members to fill the vacancy for the remainder of the term for which the vacating member had been elected.

The members of the first board of directors shall serve until the regular annual organization meeting next ensuing and for one year or two years thereafter as their first terms shall be established according to an assignment of original terms in which the names of the school districts shall be arranged in order alphabetically and then numbered consecutively, beginning with the number "1," and those districts having odd numbers in such alphabetical

list shall be assigned an original term of two years, and those districts having even numbers in such list having an original term of one year. After the original term, the term of office of a school district member of the board of directors shall be for two years.

7. The board of directors shall meet for the transaction of business at least once every two months throughout the year.

The board shall neither enter into a contract nor pay a bill or demand for money against it, until the same has been presented and passed upon at a regularly called meeting of the board.

The board may designate its president, its vice-president and the county superintendent or county superintendents serving ex officio on the board as an executive committee to administer the affairs of the board of directors between regularly convened meetings of the board.

8. The board shall appoint a suitable person to be its secretary and shall fix his compensation and term of employment. The secretary shall before entering upon the duties of his office execute and deliver to the board a bond in a sum to be fixed by it, with surety to be approved by the board, conditioned for the faithful performance of the duties of his office. The board may accept the bond of a company authorized to execute surety bonds, and may pay the annual premium or fee therefor as an operating expense.

9. The powers and duties of the secretary of the board of directors shall be prescribed by the board, including but not limited to the following:

(a) Record in a suitable book all proceedings of the board.

(b) Pay out on warrants signed by two members of the executive committee all moneys of the commission.

(c) Report to the board at each regular meeting:

(1) The amount of the total appropriations and the cash receipts for each account;

(2) The amount for which warrants have been drawn and the amount of orders for all contractual obligations since the date of his last report;

(3) The accounts against which the warrants have been drawn and the accounts against which the contractual obligations are chargeable; and

(4) The cash balance and free balance to the credit of each account;

(d) Notify all members of the board of all regular meetings of the board.

(e) Notify all members of the board of special meetings of the board when ordered by the president to do so, or when requested to do so by a petition in writing signed by at least 1/3 of the members of the board.

(f) During the month of October in each year, report to the board a detailed report of its financial transactions during the preceding fiscal year, and file a copy thereof with the county superintendent of schools, or county superintendents, as the case may be, of the county or counties in which the commission is located.

10. The board of directors may appoint a suitable person to be the executive director of the commission. Such person shall possess a certificate appropriate to his position as may be prescribed under rules of the State Board of Examiners. He shall have a seat on the board of directors, but no vote. He shall have the same powers as are conferred upon superintendents of schools by Title 18A of the New Jersey Statutes.

11. The board of directors shall be a body corporate, and shall be known as "The Board of Directors of . . ." (here shall be inserted a suitable name to be adopted by the board of directors with the approval of the State Board of Education, but such name shall contain at least the words "Educational Services Commission").

12. The board of directors shall annually, on or before October 1, prepare a budget for the ensuing fiscal year, and submit such budget to the board of directors at the annual organization meeting in October. The board of directors shall adopt a budget on or before November 1 next following its organization and shall forthwith notify all member boards of education of their proportionate share of the operating expense of the commission for the next ensuing year. The proportionate share of the operating expense for each member board of education shall be determined as the proportion which the total public school enrollment in the school district on September 30 of the year in which the budget is made bears to the total public school enrollment for all member districts on said September 30. Payment of the member district's proportionate share of the operating expense, when so determined, shall be an obligation of a member school district, and payments shall be made during the school year for which such budget shall have been made in four equal installments on July 1, October 1, January 1, and April 1.

13. The board of directors shall from time to time determine what services shall be provided by the commission, subject to approval of and pursuant to rules of the State Board of Education. It shall determine the cost of providing such services, and may enter into contracts with member school districts to provide such services. Such contracts may be for terms not exceeding 10 years, and a member

school district, having so contracted, may not withdraw from membership in the commission during the term of such a contract.

14. Except as provided in Section 13 of this act, a school district which is a member of a commission may withdraw from membership by adopting a resolution setting forth its intention to withdraw, and filing with the secretary of the board of directors a certified copy of such resolution. Such withdrawal shall be effective at the conclusion of the third full school year after the filing of such resolution with the secretary of the board of directors.

15. The board may employ teachers, principals and other employees, subject to the provisions of Title 18A for the employment of personnel for public school districts, and subject to the rules of the State Board of Examiners for the employment of persons whose office, position or employment requires them to hold an appropriate certificate issued by the State Board of Examiners.

16. Persons holding office, position or employment under a board of directors of a commission shall enjoy the same rights and benefits as are enjoyed by persons holding office, position, or employment under a public school district board of education.

17. With the approval of the State Board of Education, the board of directors may enter into a contract with and receive and administer funds and grants from any individual or agency, including but not limited to, agencies of the Federal Government of the United States.

18. The board of directors shall adopt and employ such a system of bookkeeping and accounting as may be prescribed by the State Board of Education. The board of directors shall comply with the requirements for audit prescribed in chapter 23 of Title 18A for public school districts.

19. The board of directors may enlarge the purposes for which the formation of the commission was approved, upon application to and approval by the State Board of Education.

20. A board of education not a member of a commission at the time such commission was established shall be admitted to such commission upon application to its board of directors not less than three months prior to the annual organization meeting of the board of directors next ensuing. The term of the representative elected by such new member board of education shall be for one or two years as may be required to provide for the election of as nearly 1/2 of the board of directors each year. Thereafter the term of such representative shall be for two years. Should more than one new board of education member be admitted at any annual organization, the county superintendent, or county superintendents, as the case may be, shall determine by lot the assignment of original one-year or two-year terms.

21. This act shall take effect July 1, 1968.<sup>1</sup>

New York

Legislation passed in New York in 1795 established the "town commission" which was given the duty to (1) apportion state school money among the town's several school districts, (2) confer with the school's trustees about teacher qualifications and (3) exercise some supervision over the course of study. This arrangement continued until 1841 when legislation provided for what was called a "deputy superintendent." Under terms of this law, the deputy superintendent was appointed by the county board of supervisors and was considered "deputy" to the state superintendent.<sup>2</sup>

In 1843 the town commissioners and the town inspectors (trustees) were eliminated and the town superintendent's position created. Soon the deputy superintendent was eliminated from the picture, and the town superintendent remained as the sole official performing intermediate-type educational duties.<sup>3</sup>

The town superintendency was discontinued in 1856 and a new statute made provision for an elected county superintendent. This arrangement prevailed until 1910 when the elected county superintendency was abolished and supervisory districts, made up of a number of towns in each district, were formulated. Each supervisory district had a

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<sup>1</sup>New Jersey State Laws, Chapter 243, Laws of 1968, (Senate Bill No. 727, approved August 6, 1968).

<sup>2</sup>Campbell, Cunningham, and McPhee, p. 112.

<sup>3</sup>Ibid.

board of school directors responsible for the selection of a superintendent of schools. Legally, the superintendent seemed to be directly responsible to the state education commissioner.<sup>1</sup>

In 1910 the elected county superintendency was abolished and supervisory districts, each comprised of a number of towns, were established. All territory outside of cities of 4,500 or more in population was to be included in supervisory districts.

Boards of Cooperative Educational Services were authorized to be established in 1948. These were, originally, to serve as an interim step, leading to the establishment of intermediate districts but now blanket the state of New York.<sup>2</sup> Section 1958 of the Education Law was passed in 1948 and various amendments, including section 1959 and Chapter 795, Laws of 1967, have been added since that time. The provisions for Boards of Cooperative Educational Services are as follows:

1958. Establishment of boards of cooperative educational services pending the creation of intermediate districts.

1. The boards of education and school trustees of a supervisory district which is not part of an intermediate district, meeting at a time and place to be designated by the district superintendent of schools, may, by a majority vote of their members present and voting, file with the commissioner of education a petition for the establishment of a board of cooperative educational services for the purpose of carrying out a program of shared educational services in the schools of the supervisory district and for providing instruction in such special subjects as the commissioner may approve.

2. Upon the establishment by the commissioner of such a board, members of boards of education and school trustees, by a majority vote of those present and voting, shall elect a board of cooperative educational services consisting of five members. These shall serve for five years. . . .

3. The boards of cooperative educational services in any two or more contiguous supervisory districts may cooperate in the provision of educational services.

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<sup>1</sup>Ibid., pp. 112-113.

<sup>2</sup>Ibid.

4. The board of cooperative educational services shall have the power and duty to:

- a. Appoint a district superintendent of schools. . . .
- b. Prepare the budget of expenditures, . . . adopt the budget.
- c. Make or cause to be made surveys to determine the need for cooperative educational services in the supervisory district and present the findings of their surveys to local school authorities.
- d. At the request of component school districts, and with the approval of the commissioner of education, provide any of the following services on a cooperative basis: school nurse teacher; attendance supervisor, dental hygienist; teachers of art, music, physical education, vocational subjects, guidance counselors; maintenance and operation of cafeteria or restaurant service for the use of pupils and teachers while at school; and such other services as the commissioner of education may approve.
- e. Employ personnel necessary to carry out its program.
- f. Receive funds and allocate the costs of cooperative educational activities and shared services. . . .
- g. Borrow money in anticipation of revenue due the board.
- h. Arrange cooperative educational services with and if necessary make contracts covering same with other public agencies for shared services.
- i. Make reports as are required by the commissioner of education.
- . . . . .
- p. To rent suitable classrooms, offices or buildings in which to maintain and conduct such cooperative educational services and administrative offices when necessary and to equip and furnish such classrooms, offices or buildings in a suitable manner for such purposes.
- q. To provide transportation for pupils to and from classes maintained by such board of cooperative educational services.
- r. Furnish any of the educational services provided for in this section to school districts outside of the supervisory district.

5. Receive state funds.

6. The board of cooperative educational services is hereby created a body corporate.<sup>1</sup>

Frederick J. De La Fleur, director of research for the New York State School Boards Association, Inc., conducted a study to find out what the shared boards of the State looked like, what they were doing, and how they have developed.<sup>2</sup> His observations and conclusions are:

1. A wide divergence has been found among cooperative boards in New York State, due to wide differences among existing local situations.
2. The prime motivation of all boards of cooperative educational services and those responsible for carrying out their functions has been service to component districts.
3. Expansion of program offerings through the use of shared teachers has been particularly noted in rural areas of New York State. Educational services through the cooperative use of nonclassroom professionals have had their greatest expansion in more densely populated areas.
4. The use of shared teachers changes in character as enrollments of component districts increase.
5. There has been a growing realization that some positions, in order for personnel to function most efficiently, should be considered part of the "headquarters" staff.
6. There appears to be an increasing realization of the need for in-service training of local staff members.
7. Boards of cooperative educational services are still in the pioneering stage.<sup>3</sup>

Haweeli, in 1964, conducted a study of the Boards of Cooperative Services in New York and drew these conclusions:

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<sup>1</sup>Laws of New York, Chapter 583, 1955, pp. 1-6, and Chapter 795, 1967, pp. 1-15.

<sup>2</sup>Frederick De La Fleur, Shared Services Boards, New York State School Boards Association, Inc., (Albany, New York, 1961), p. 7.

<sup>3</sup>Ibid.; pp. 11-15.



Many of the present shortcomings of BOCES stem from the impermanence of the administrative unit itself. Created, pending the establishment of intermediate districts, BOCES are too weakly structured to adequately serve intended purposes. Neither have they encouraged the formation of the intermediate districts. Consequently, it is proposed that existing BOCES be absorbed by a new unit, the Cooperative Regional Education Board. This board would provide needed services to districts of up to 125,000 population. Such districts would be components of the board.

A new concern for educational opportunity is apparent among educators. Educational needs and purposes growing out of this concern are such that their efficient and effective resolution rests with groups of local districts working through the proposed instrumentality to make possible the realization of these needs. Firmly based in the law, soundly and adequately financed, and structured for effective liaison between the State and local districts, the regional board may well serve the purposes intended for intermediate districts which, up to now, have not achieved full status in the educational structure of New York State.<sup>1</sup>

### Oregon

In Oregon the county has served as the intermediate school district since 1849.<sup>2</sup> In 1911 two significant changes were made in the law pertaining to the county school superintendent's office. First, the county superintendent was relieved of certain duties. Second, due to the increase in the number of school districts the supervisory workload of the county school superintendent's office was increased. This led to the provision for a County Educational Board in all counties having more than sixty school districts.<sup>3</sup> In 1945, the legislature created the rural school district in all counties except those operating under the county unit law. This legislation was approved by the voter in 1946.<sup>4</sup>

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<sup>1</sup>Norman Haweeli, "An Inquiry into the Function and Administration of Boards of Cooperative Educational Services in the State of New York With Proposals For Their Improvement." (Unpublished doctoral dissertation, Columbia University, New York, 1964), pp. 2-3.

<sup>2</sup>Sabin, p. 52.

<sup>3</sup>Ibid., p. 60

<sup>4</sup>Ibid., p. 64.

In 1957, the office of County Superintendent of Schools was made appointive and a regular administrative credential was required.<sup>1</sup>

The 1963 Oregon Legislative Assembly enacted Senate Bill 409 which replaced the "Rural School District" and transferred most of the existing provisions of the Rural School District Law to the new district. The law also transferred numerous powers and duties of the county school superintendent to the Intermediate Education District Board.<sup>2</sup>

Under the provision of Chapter 334, Oregon Laws of 1963, the Intermediate Education District is a body corporate which may sue and be sued. The Intermediate Education District Board is authorized to transact all business within the jurisdiction of the Intermediate District.

The Intermediate Education District Board shall perform all duties required by law, including but not limited to: (1) Distribution of such school funds which it is empowered to apportion; (2) ascertain that annual audits of local school district accounts are conducted as required by law; (3) serve as the District Boundary Board; (4) Budget for and levy a tax annually for the expense of the Intermediate Education District Superintendent's office, the expenses of the Board, and tax levying duties; (5) curriculum improvements; (6) registration of contracts, teaching and health certificates; (7) special education programs; (8) employ and fix the compensation of such personnel as it considers necessary for carrying out the duties of the Board; (9) make such rules as it considers necessary to carry out the duties of the Board; (10) the Intermediate Education District Board shall deem the amount and apportionment of the tax equalization levy and certify same to the Assessor.

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<sup>1</sup>Ibid., p. 61.

<sup>2</sup>Ibid., pp. 69-70.

The Intermediate Education District or a combination of Intermediate Education Districts may provide to all school districts which are a part of the Intermediate Education District or Districts, services and facilities, including but not limited to central purchasing, library, curriculum materials, special teachers, and special programs under ORS Chapter 343.

Facilities and services authorized under Subsection (1) of ORS 334.175 may be provided to common and union high school districts outside the IED on a reimbursable basis.<sup>1</sup>

#### Pennsylvania

In 1834, the Pennsylvania legislators passed the Free School Act. This venture into free public education resulted in the formation of 531 school districts. In 1854 with the established school districts in need of coordination and leadership, the Legislature created the County Superintendency.<sup>2</sup>

The Act of 1854 prescribed that the county superintendent visit schools "as often as practicable, to examine and certify teachers, to see that the courses prescribed by law be taught and, if any were made available, to distribute state monies to local school districts." The line of administration was from state to county to school district.<sup>3</sup>

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<sup>1</sup>Minimum Standards for Intermediate Education Districts, Oregon Association of Intermediate Education Districts and County District Superintendents, 1965, p. 1. (Mimeographed)

<sup>2</sup>Pennsylvania State Board of Education, A State Plan of Intermediate Units for Pennsylvania, (Harrisburg, Pennsylvania: State Board of Education, 1967), p. 1.

<sup>3</sup>Ibid.

The reassessment of the present middle echelon--the county office--has been brought about by the development of school districts staffed by more competent persons, more adequately financed, large enough to provide many basic services, and with a strong community commitment to education. Mass communication developments permit direct and rapid communication between the Department of Public Instruction and each school district. Improved transportation facilities place local and state administration within a few hours of each other. Clearly, there was little need for a middle echelon to administer or operate schools.<sup>1</sup>

On the other hand, increased demands are being made of the education system, resulting in the need for highly specialized services which cannot be provided well by either the Department or a school district. This suggests the need for some kind of intermediate unit in Pennsylvania to provide services to school districts.<sup>2</sup>

Furthermore, the reorganization of school districts into more efficient size has created a need for a new operational framework for the present county office. During the 1966-67 school year all but 29 school districts out of 466 school districts were eligible to elect a District Superintendent. Thirteen counties have each become a single county district and 39 counties contain six or fewer school districts.<sup>3</sup>

The State Board of Education has adopted a State Plan of Intermediate Units, as directed by the Act of December 1, 1965. The major provisions of this plan are:

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<sup>1</sup>Ibid.

<sup>2</sup>Ibid.

<sup>3</sup>Ibid.

1. All school districts shall belong to an intermediate unit and shall be entitled to the services of an Intermediate Unit in accordance with a program adopted by the Intermediate Unit Board of Directors and approved by the Superintendent of Public Instruction.
2. The costs shall be shared by all school districts according to a formula reflecting the number of pupils and the aid ratio within the Intermediate Unit, of each school district within the Intermediate.
3. The Intermediate Unit may also provide contractual services to school districts upon request of a district Board of School Directors and with the approval of the Intermediate Unit Board of Directors, the cost of such contracted services to be borne by contracting school districts.
4. The Intermediate Unit program should be developed according to the needs of the school districts served by the unit. The programs shall include (1) Unit Administrative Services, (3) Research and Planning Services, (4) Instructional Materials, (5) Continuing Professional Education Services, (6) Pupil Personnel Services.
5. The Intermediate Unit Board of Directors shall be composed of nine members, chosen for terms of three years from among members of the school boards of school districts comprising the Intermediate Unit. Votes will be cast according to the district's weighted average daily membership in comparison to the total weighted average daily membership within the Intermediate Unit.
6. The staff on an Intermediate Unit shall consist of the Executive Director, one or more assistant directors and such specialists as may be needed to carry out the program of the Intermediate Unit. The Executive Director shall be chosen by the Intermediate Unit Board of Directors for a term of four years.
7. The powers and duties of the Intermediate Unit Board of Directors shall include, but not be limited to: (1) Selection of the Executive Director and determination of his salary; (2) approval of Intermediate Unit professional staff appointments; (3) adoption of employment policies and salary schedules for the Intermediate Unit professional and nonprofessional staff; (4) approval of the Intermediate Budget; (5) approval of the program; (6) such other duties as may be required by regulation of the State Board of Education; (8) an Intermediate Unit Council shall be advisory to the Executive Director. The Intermediate Unit Council shall be composed of all the chief school administrators within an Intermediate Unit. (9) The boundaries of each Intermediate Unit shall be determined by the State Board of Education. Two criteria shall be used by the Board: number of public school children enrolled--100,000 minimum, and ease of travel within the Unit--one hour maximum. (10) Financial support

for an Intermediate Unit may come from three sources: school district, state, federal funds.<sup>1</sup>

### Texas

Brockette said that there had been growing recognition in Texas, prior to a major study in 1956, that a regional approach to provide educational services to local districts was needed. Though reorganization had brought a decrease in the more than 2,000 local districts during the early 1950's to the present 1,280 districts, to date less than 10 percent of the Texas school districts are large enough, in terms of pupil population, to offer the services essential to assure a full education program.<sup>2</sup>

Due to responsible legislative enactment in the Texas Legislature for the years 1965 and 1967, the concept of providing programs to function within a regional setting was given birth and nurtured. It remained for the Texas Education Agency and the State Board of Education to plan and develop the program.<sup>3</sup>

The 1967 Legislature authorized the State Board of Education to provide for the establishment and procedure for operation of Regional Education Service Centers under provisions of Senate Bill No. 408, Acts of the 59th Legislature (codified Article 2654-3d, V.T.C.S.) for providing educational services to school districts and coordinating

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<sup>1</sup>Ibid., pp. 2-14.

<sup>2</sup>Marlin L. Brockette, "The Regional Education Service Centers in Texas," Journal on State School Systems Development, Vol. 1, No. 3, (Fall, 1967), p. 163.

<sup>3</sup>Ibid., pp. 163-164.

educational planning in the region; authorizing the governing board of each such center to contract and to expend grants received from public and private organizations for purpose(s) contracted, pursuant to rules and regulations of the State Board of Education. . . .<sup>1</sup>

The Texas Education Agency answered these questions about Education Service Centers.

What is an Education Service Center? An Education Service Center is a regional educational institution established to develop and provide a locally-oriented base for cooperative educational planning, operate the regional media component, and coordinate and encourage the development of supplementary education services and centers under Title III of the Elementary and Secondary Education Act. The center, authorized by the Fifty-ninth and Sixtieth Legislatures, is designed to provide services to school districts in a region in response to the needs and wishes of those districts.

The State Board of Education has designated twenty (20) regions in Texas, each to be served by an Education Service Center, and has adopted broad policies for establishing the centers. These policies are designed to ensure the local voice in implementing and operating the service center.

How Will it be Organized? Membership in the center is permissive; a school district may or may not choose to participate. However, all school districts may be represented on the Joint Committee, and participate fully in planning, even if they do not choose to partake of cooperative services requiring a local financial support for the center.

The Joint Committee, an advisory group for the Education Service Center, will be selected by and responsive to the local school district. The Joint Committee elects the membership of the Board of Directors of the center and serves as an advisory body to that board.

The Board of Directors is the policy-making and appraisal body of the Education Service Center. The five-or-seven-member lay group, elected by members of the Joint Committee, names the Executive Director of the center.

The Executive Director is the executive officer of the center, elected by the Board of Directors. Planning and media services will begin concurrently. The first responsibility of the center staff will be two-fold: to implement the media services authorized by the Fifty-ninth Legislature, and to begin planning for other services which local schools in the region need and want.

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<sup>1</sup>Texas State Laws, Senate Bill 313, Acts of the 60th Legislature.

Among the advisory groups, the Joint Committee has a continuing role to the Board of Directors. In addition, there will be an Advisory Committee of teachers, supervisors, and principals from school districts served by the center.

How Will It be Financed? Public and private resources may be utilized in center operation. Media operations of the center will be financed jointly by the State and local school districts in accord with provisions of the legislation establishing the regional media center. A portion of the funds available to Texas under Title III of the Elementary and Secondary Act will also be devoted to center operation.

How Will the Center Serve the Local School District? The center will establish planning capability to identify the instructional needs of its region, and establish media services for member schools, to include, but not be limited to,

- a materials lending library,
- duplication services for instructional materials,
- a delivery and dissemination service.

The center will also plan and implement additional educational services needed in the region. Through participation on the Joint Committee and the Advisory Committee, local school districts will help to determine what these services should be. The center will offer those services which are not feasible for single local school districts to provide--services too expensive or services requiring specialists or equipment not readily available.

What is the Role of the Local School District in the Education Service Center? The local school district has a continuing and important contribution to make to the success of the Education Service Center.

The local Board of School Trustees elects a person to represent the interests of the school district on the Joint Committee. This person should be connected with the school system.

The local school district through its representatives on the Joint Committee, advisory committee, and other possible planning groups, keeps the Board of Directors apprised of its needs and wishes.

All participating school districts are responsible for planning educational services. Those participating districts receiving services in cooperatively financed programs will contribute to the financial support of the center.<sup>1</sup>

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<sup>1</sup>State Plan for the Establishment of Education Service Centers Including Regional Education Media Centers, (Texas Education Agency, 1968, Austin, Texas), pp. iv-v.



A study was completed by the University of Texas in 1968 on the Service Centers after one year of operation. Findings of this study were:

1. Visibility of the Service Centers develops rapidly. The Education Service Center in its first year of operation became equal to any other recognized source of outside help for all school district personnel.
2. Visibility of the Education Service Center (as indicated by the number of free-responses which mentioned the Service Center by name) was about seventy-one percent. The amount of visibility was directly related to the hierarchy of positions; the higher the position of the respondent in his organization, the greater the visibility.
3. Consumers in school districts became aware of direct, tangible instructional services such as media more readily than indirect, intangibles such as staff development. Almost all interviewers were aware of the media services offered. Fewer than half were aware of staff development services. Less than a fourth were aware of other services.
4. Media-related services were most used of any services; but only about one-half of the teachers who were aware of services (including availability of film) reported they were using the services.
5. Respondents closer to the instructional use of a service are more likely to rate it high. All positions, however, tended to rate services received above the midpoint of the scale used.
6. All respondents valued availability on demand higher than any other characteristic of media services. Principals were more concerned with variety of media than were other groups.
7. School districts were a good "market" for services, since they were receiving few services from sources outside the district. Senior colleges and universities were about the only competing sources for many of the services offered by the Service Centers. This was particularly pronounced in availability of in-service training which was being obtained from outside resources by only a handful of respondents.
8. The media component of the Service Centers was a quantum change in improving the quality of media services available. Only a few respondents who were receiving media services reported that conditions had not improved.
9. The expectations for future growth of the Service Centers are optimistic. Respondents believed that services would be added and

existing services would be improved. A few were reserving judgment to see if money would continue to be made available to Service Centers in order to expand their operation.

10. Unmet needs in regions were chiefly those relating to direct instructional services. A need was expressed for guidance and counseling, curriculum consultants, in-service programs, and for instructional materials. Superintendents reported a need for planning assistance.<sup>1</sup>

### Washington

The State of Washington has had, almost from the beginning of statehood, an elected county superintendent of schools. The first major changes in the structure of this office came in 1955, and included the following:

Two or more counties could combine into a single intermediate unit.

Elected county boards of education were established.

County boards of education were made fiscally independent.

Financial support for intermediate units was provided from state funds.

Higher qualifications for county superintendents were established.

Specialized service personnel could be employed.

Travel and conference expenses were provided for.

Elected county superintendents in county unit districts were abolished.

Local districts tended to be strengthened by stronger intermediate units.<sup>2</sup>

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<sup>1</sup>Getting Started: The Education Service Center and its Clients in the First Year, (The Office of School Surveys and Studies of The University of Texas, 1968, Austin, Texas), pp. 32-33.

<sup>2</sup>National Commission on the Intermediate Unit, Intermediate Unit Report, (Washington, D. C.: Department of Rural Education, National Education Association, No. 3, 1956).

Sabin reported that the 1959 legislature enacted legislation providing for a study of the county school office by the State Board of Education with the cooperation of the State Superintendent of Public Instruction, the county superintendents, the county boards of education, and the county organization committees.<sup>1</sup> No legislation resulted from this study.<sup>2</sup>

In 1965 legislation was enacted that affected the County Superintendent's Office. It is summarized below:

Section 1. It shall be the intent and purpose of this act to establish the methods, procedures, and means necessary to reorganize existing offices of county superintendent of schools into intermediate district offices in order that the territorial organization of the intermediate districts may be more readily adapted to the changing economic pattern and educational program in the state, so that the children in the state will be provided with equal educational opportunities.

Section 10. Upon the formation of an intermediate district as provided in this 1965 amendatory act, the county committees on school district reorganization of the counties within the intermediate district shall redistrict the counties embraced by such intermediate district into five board member districts within the intermediate district in the manner set forth in RCW 29.20.010, the intermediate district board of education. Provided, that until the intermediate district board shall have been elected and qualified, all county boards shall continue as theretofore: PROVIDED FURTHER, that the election and terms of the members of the first intermediate district board shall be determined in the manner provided in RCW 29.20.010c except the filings for candidacy shall be with the county auditor of the most populous county whose office is within the intermediate district.

Section 12. Every intermediate district board shall perform the duties outlined for county boards in RCW 28.20.040 and in addition shall: (1) Designate the office of the intermediate district; and (2) Fix a higher rate of salary of the intermediate district superintendent than the minimum established in section 14 of this 1965 amendatory act when it is deemed by the intermediate district board of education to be in the best interest of the intermediate district to do so.

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<sup>1</sup>Sabin, op. cit., p. 170.

<sup>2</sup>Sabin, Ibid., p. 175.

Section 13. The minimum salary of the superintendent of schools of an intermediate school district shall be based on the number of children attending public schools in grades kindergarten through twelve of the intermediate district, as determined on October 1 of the previous year.

Section 14. Any time after a county, or the entire portion thereof within an intermediate district, has been a part of an intermediate district for five years, the county, or the entire portion of the county within the district, may withdraw from that district by a majority vote in the entire county. No portion of a county less than the entire portion of a county within an intermediate district may withdraw from an intermediate district.

Section 17. The budget of the intermediate district superintendent shall be approved by the intermediate district board of education. The boards of county commissioners of the counties within an intermediate district shall allocate from county funds for the intermediate district superintendent's budget a total amount sufficient to allow the intermediate district superintendent to fulfill the duties and powers of his office. Each county shall allocate a percentage of the total amount as determined above equal to the percentage that the assessed value of all taxable property in the intermediate district within that county bears to the assessed value of all taxable property in the intermediate district.

Section 18. The state board of education shall examine the budget of each county or intermediate district superintendent and fix the amount to be allocated thereto from state funds and certify to the state superintendent of public instruction the amount of state funds needed for the county or intermediate district superintendents' budgets as approved by the state board of education and shall require the state superintendent of public instruction to allocate this amount from the current state school fund or from funds otherwise appropriated for that purpose to the county treasurers for deposit to the credit of the county or intermediate district superintendent's budget for the use of the common schools.

Section 21. The county superintendent or intermediate district superintendent must arrange each year for the holding of one or more teachers' institutes and/or workshops for in-service training, in such manner and at such times as he believes will be of benefit to the teachers of the county or the intermediate district. He may provide such additional means of teacher in-service training as he may deem necessary or appropriate and there shall be a proper charge against the county or intermediate district institute fund when approved by the county or intermediate district board.<sup>1</sup>

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<sup>1</sup>Washington State Laws of 1965, Chapter 139, Laws of 1965 (Senate Bill 304).

Wisconsin

In 1861, the Wisconsin state legislature authorized an office of county superintendent of schools to supersede that of town superintendent. The law provided that county superintendents be elected by the qualified voters of each county, in the same manner in which the State Superintendent of Public Instruction was selected.<sup>1</sup>

In carrying out their duties, county superintendents of schools took on all of the functions performed earlier by the town superintendent and/or secretary of the town board of directors.<sup>2</sup>

The actual importance of the county superintendency as a representative of the state education department and as counselor and advisor of local schools grew substantially over the years. The county was the exclusive intermediate district in Wisconsin from the establishment of the county superintendency in 1861 until 1927 when a provision permitting modification was enacted. A law passed that year authorized the county board in any county having a population in excess of 15,000 to divide into two county superintendent districts. At the same time legislation was enacted that made all city school districts independent of any form of county jurisdiction or control.<sup>3</sup>

As reorganization took place across the state the circumstances within counties were changed in substantial ways. Counties which previously contained 30, 60, and 90 or more school districts had been

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<sup>1</sup>John R. Belton, "Wisconsin's New District Educational Service Agencies," Journal on State School Systems Development, Vol. 1, No. 4, (Winter, 1968), p. 204.

<sup>2</sup>Ibid., pp. 205.

<sup>3</sup>Ibid., pp. 206-207.

reorganized into only a few. One step which hastened this change was legislation in 1959 which simplified the procedure by which two or more counties could share the same county superintendent. The system was awkward and unsatisfactory, however, and it was soon obvious that a more complete restructuring of the office of county superintendent would be necessary.<sup>1</sup>

The State Superintendent established a special committee to make a thorough study of the State's middle echelon of school organization and charged it with finding out what existed in this echelon and how it might be corrected. The recommendations of this committee, with modifications acceptable to the legislature, were enacted into law on June 12, 1964. The legislature provided that all county superintendents offices would be abolished at the expiration of the term of incumbent superintendents--July 1, 1965.<sup>2</sup>

The 1964 law, Chapter 565, Subchapter 11, Cooperative Educational Service Agencies, contains the following:

39.51 PURPOSE. The organization of school districts in Wisconsin is such that there is a recognized need for some type of a service unit between the local district and state superintendent level. There is hereby created such units designed to serve educational needs in all areas of Wisconsin. Such cooperative educational service agencies are created by the state as a convenience for local districts in cooperatively providing special educational services to teachers, students, school boards, administrators, and others and may include, but is not restricted because of enumeration, such programs as research, special student classes, data collection, processing and dissemination, in-service programs and liaison between the state and local school districts.

39.54 REVISION OF AGENCY BOUNDARIES AFTER JANUARY 1, 1967. Effective January 1, 1967, the state superintendent is empowered to shift a school district from one service agency to another upon the petition of such school board but shall transfer only whole school districts from one service agency to another. . . .

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<sup>1</sup>Ibid., p. 208.

<sup>2</sup>Ibid., pp. 208-209.

39.545 REORGANIZING COOPERATIVE AGENCIES. (1) A cooperative agency board of control may on its own motion or shall on the petition of 100 electors of the service agency area, approach an adjoining agency board or boards regarding the consolidation of their service areas. The boards acting jointly shall devise a plan for the equitable distribution of the assets and liabilities of the existing service agency areas and provide for the transfer of existing contracts and programs.

. . . . .  
(3) Following the hearing on the proposed consolidation the service agency boards of control of those agencies affected shall vote on the consolidation. A majority vote of the members present and voting from each service agency board shall be necessary to approve and effect the proposed consolidation. These consolidations shall become effective on the next succeeding July 1.

39.55 COOPERATIVE EDUCATIONAL SERVICE AGENCY, GOVERNING BODY. (1) Each cooperative educational agency created by the state cooperative service committee shall be governed by a board of control composed of one delegate from each school district board in the agency designated annually in July by such school board, but not more than 11 members.

(2) If there are more than 11 school districts in the service agency, the state superintendent shall convene a convention composed of one delegate from each school district in the agency which shall formulate a plan of representation for such agency including no more than 11 representatives, which plan shall be made effective at once.

39.56 FUNCTIONS OF BOARD OF CONTROL. The cooperative educational service agency board of control shall:

(1) Determine the policies of the service agency.

(2) Receive state aids for operation of the cooperative service agency.

(3) Approve service contracts with local school districts, county boards of supervisors and other cooperative educational service agencies but no such contracts shall extend beyond 3 years.

(4) Determine participating local unit's prorated share of the cost of cooperative programs and assess such costs against each participating unit, but no board of control may levy any taxes. No cost shall be assessed against a unit for a cooperative program unless the school district enters into a contract for such service.

(5) Appoint and contract with an agency coordinator, for a term of not more than 3 years, with qualifications established by rule of the state superintendent of public instruction but at least equal to the highest level of certification required for local school district administrators, who shall be considered a teacher as defined by s.42.20(13), and subject to ch. 42.

(6) Meet monthly and at the call of the chairman.

(7) Select a chairman, vice-chairman and treasurer from its membership at the annual organizational meeting. The coordinator shall act as a nonvoting secretary to the board of control. Vacancies shall be filled as are original appointments.

(8) Adopt bylaws for the conduct of its meetings.

(9) The board shall require a bond of the treasurer and the coordinator.

(10) Authorize the expenditure of money for the purpose set forth in this subchapter and for the actual and necessary expenses of the board and coordinator and for the acquisition of equipment, space and personnel. All accounts of the agency shall be paid on voucher signed by the chairman and secretary.

(11) The board shall establish the salaries of the coordinator and other professional and nonprofessional employees. The salary of the coordinator shall be within the range of \$10,500 to \$13,500. (This has been amended to \$16,728).

(12) Do all other things necessary to carry out the provisions of this subchapter.

39.57 AGENCY COORDINATOR. The agency coordinator shall be responsible for coordinating the services, securing the participation of the individual districts, county boards and other cooperative educational service agencies and implementing the policies of the board of control.

39.58 PROFESSIONAL ADVISORY COMMITTEE. There shall be in each service agency a professional advisory committee composed of the highest professional school district administrator in each school district in such agency who shall meet at the request of the board of control or coordinator to advise them.

39.59 STATE AIDS. (1) Annually, beginning July 1, 1965, there shall be paid to each cooperative educational service agency for the maintenance and operation of the office of the agency board of control and coordinator a sum not to exceed \$22,000 for each cooperative service agency, but after 1965-66 no aids shall be paid unless the service agency submits a detailed certified statement of its expenses for the prior year. . . .

(2) Service agencies may incur short term loans prior to the aid payments and making of contracts to permit the organizational steps required to establish a service agency.



(3) No school district shall ever lose any state educational aids based on refusal of such school district to subscribe to any such services provided by these educational service agencies.<sup>1</sup>

On July 1, 1968, the Cooperative Educational Service Agencies were three years of age. More than 418 districts were served in various ways by the unit.<sup>2</sup> The services and personnel arranged through agency offices included the following:

Shared Teachers: Art, Driver Education, Music, Science, Physical Education, Reading.

Shared Service Personnel: Coordinator of Curriculum and Instruction, Supervisor of Instruction, Curriculum Consultant, Social Worker, Coordinator of Programs for the Disadvantaged, Supervisor of Transportation.

Special Education: Coordinator-Supervisor of Handicapped Children's Education, Psychologist, Psychometrist, Speech Therapist, Teacher of Trainable Classes, Teacher of Bedridden and Homebound Pupils.

Other Services: Cooperative Purchasing, In-Service Training Program, Book and Film Libraries, Data Processing Programs, Test Scoring Programs, School Board Conferences.

The growth in utilization of shared personnel and services is evident in examining a summary of the reports submitted by the agencies for the first three years of operation.

Number of CESA Shared Services and Personnel by Years, 1965-1968.

	<u>1965-66</u>	<u>1966-67</u>	<u>1967-68</u>
Shared Personnel	101	168	366
Shared Services	33	33	68
Number of Participating Districts	311	412	418
Total Wisconsin School Districts	562	513	490 <sup>1</sup>

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<sup>1</sup>Laws of Wisconsin, Chapter 565, Laws of 1963, pp. 1-18.

<sup>2</sup>Wisconsin's Intermediate Unit: The Cooperative Educational Service Agency, W. C. Kahl, State Superintendent of Public Instruction, (Madison, Wisconsin), pp. 4-5.

<sup>3</sup>Ibid., p. 5.

In summary, the features of the Cooperative Educational Service Agency organization are as follows:

1. Each agency consists of a contiguous group of school districts.
2. Its Board of Control consists of 11 School Board members from as many school districts in the agency areas.
3. It has no jurisdictional responsibility over school districts.
4. It has no taxing power; but receives up to \$29,000 annual state aids for administrative expense.
5. Its professional head is a certified school administrator selected by the Board of Control and designated with the term, Coordinator.
6. The administrator of each school district is a member of the statutory Professional Advisory Committee of the agency.
7. The agency exists to provide, cooperatively, needed services to individual districts by contract with the district boards.
8. A school district accepts and pays for only those services for which it has contracted.
9. The agency serves as liaison between the state and local districts but it is not an arm of the Department of Public Instruction.
10. The agency appoints a lay committee of seven members which has a statutory function in effecting changes in school district boundaries.

The Cooperative Educational Service Agency structure is a device typically sensitive to the principle that local school decisions are properly made at the local school district level. No taxing power, no regulatory power, no pleasant prospect of added state aids encourages its utility. Its appeal, if it has any, lies in the fiscal and educational advantages that cooperation makes possible to school districts. Its utilization and effectiveness can become an indication of the extent to which local school officials prize and prove the value of the school improvement decision-making power in their hands. If the Cooperative Educational Service Agency fails to serve its purpose because local school district officials ignore or fail to recognize their own needs, there could be an erosion of local district responsibilities. Such responsibilities could reappear in the common, increasing reservoir of untouched needs approached at the state and national level.<sup>1</sup>

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<sup>1</sup>Ibid., pp. 6-7.

Wyoming

In 1969, Wyoming passed an act allowing districts to form a Board of Cooperative Educational Services. This act, The Cooperative Services Act (House Enrolled Act 82; OHB 219) has the following major provisions:

Section 1. This act may be cited as "The Board of Cooperative Educational Services Act of 1969."

Section 2. This act is passed to provide a method whereby school districts and community college districts or any combination of such districts may work together and cooperate to provide educational services, including but not limited to vocational-technical education, adult education, and services for exceptional children, when such services can be more effectively provided through a cooperative effort.

Section 4. The organizing of Boards of Cooperative Service. (a) Interested boards meet and vote to form a Board of Cooperative Service.

(b) All board members of participating boards meet and elect from their memberships members for the board of the Cooperative Unit. This board shall be composed of not less than 5 members nor more than 9 members, unless there are more than 9 districts participating, in which event each participating district or community college district shall have one member. The terms of office shall be coterminous with their respective terms of office upon their boards of trustees.

Section 5. The board of cooperative educational services shall be organized in the usual fashion.

Section 6. The costs of facilities, equipment, and services performed under the direction of the board of cooperative educational services shall be financed by participating school districts and community college districts on a basis agreed upon by the boards of trustees of the participating districts.

Section 7. Each board of trustees of cooperative educational services shall: (a) prescribe and enforce rules, regulations and policies for its own government and for the government of the services and affairs under its jurisdiction; provided, that such rules and regulations shall be consistent with the laws of the state.

(b) Keep minutes of all meetings at which official action is taken and a record of all official acts. Such minutes and records shall be public records.

(c) Be responsible for such programs and services as shall be provided by joint agreement of the boards of trustees involved in the cooperative educational programs.

(d) Administer and abide by the terms of the agreement or agreements entered into by the participating districts.<sup>1</sup>

### Summary of Implementation Procedures in the Respective States

This section contains a brief summary of the procedures followed by the respective states in the implementation of their state plans.

#### Colorado

Colorado's Boards of Cooperative Services are made possible by permissive laws passed in 1965. The Colorado State Department of Education was the agency designated to implement the act.<sup>2</sup> Boards of Cooperative Services were started shortly after the law was passed and now more than half of the school districts belong to Boards of Cooperative Services.<sup>3</sup>

#### Iowa

Legislative action in 1965 brought into being the merged county school system in Iowa. This legislation provides for two or more adjacent counties to merge and form a merged county school system.<sup>4</sup> According to Ambach there are five joint systems in operation in Iowa.<sup>5</sup>

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<sup>1</sup>State Laws of Wyoming, The Cooperative Services Act (House Enrolled Act 82; OHB 219), 1969.

<sup>2</sup>Colorado School Laws, Article 34, Boards of Cooperative Services Act of 1965.

<sup>3</sup>Colorado Education Director, 1968-69, Colorado State Department of Education (Denver, Colorado, 1968), pp. 161-168.

<sup>4</sup>Laws of Iowa, 1965, House File 553.

<sup>5</sup>Letter from Gordon M. Ambach, Special Assistant to the Commissioner, Office of Commissioner of Education, State of Iowa.

## Michigan

The intermediate school districts were reorganized by legislation by a 1962 act that abolished the office of county superintendent and provided for the organization of new intermediate units.<sup>1</sup> Michigan has 60 of the new intermediate units in operation.<sup>2</sup>

## Nebraska

Nebraska's nineteen multicounty educational service units were created by the 1965 legislature (LB 301). Various studies had been conducted at different times on the intermediate unit in Nebraska and these studies provided the information needed to support the enactment of the multicounty intermediate unit legislation (LB 301). The law provided for the organizational and operational structure of the service units.

To assist in the statewide implementation of this network of service units the State Board of Education is empowered by this legislation to initiate and administer its provisions and to draft any necessary rules and regulations which will be consistent with statutes governing State Board powers.<sup>3</sup>

## New Jersey

New Jersey's Educational Services Commissions were authorized by legislative action, Senate Bill No. 727, passed in 1968, and their

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<sup>1</sup>Laws of Michigan, 1972, Act 190 of Public Acts of 1962.

<sup>2</sup>William J. Emerson, "Intermediate School District," Journal on State School Systems (Spring, 1967) Vol. 1, No. 1, p. 39.

<sup>3</sup>William R. Schroeder, "The Nebraska Service Unit--Its Provisions, Problems, and Potential," Journal on State School Systems (Spring, 1967) Vol. 1, No. 1, pp. 56-61.

functions, powers, and duties were prescribed. The State Board of Education was empowered to implement this legislation.<sup>1</sup> Two units are now operating in New Jersey.<sup>2</sup>

#### New York

Boards of Cooperative Services were created by legislation in 1948. The Commissioner of Education is empowered to implement the statutes. Boards of Cooperative Services have been operating in New York since they were authorized in 1948.<sup>3</sup>

#### Oregon

The 1967 Legislative Assembly created the Intermediate Education District Commission to prepare a state plan for organizing intermediate education districts. The plan was presented to the Oregon Board of Education, for its consideration, in keeping with Oregon Laws of 1967.

In preparing the plan, the Commission divided its task into four phases: (1) familiarizing itself with the role and function of IED; (2) identifying services that IED can perform to help assure equal educational opportunities for all Oregon children; (3) studying current IED operations and noting unmet needs; (4) developing recommendations for changes in the structure and function of IED that could improve their effectiveness. The Commission sought and considered the advice of specialists in various services, school officials, school board members and other interested citizens.

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<sup>1</sup>Laws of New Jersey, Senate Bill No. 727, Laws of 1968.

<sup>2</sup>Letter from Robert W. Ward, Director, Office of Program Development, Department of Education, State of New Jersey.

<sup>3</sup>Campbell, Cunningham, and McPhee, op. cit., p. 112.

The Commission was composed of eleven members appointed by the Oregon Board of Education as directed by statute. Members were required to have special knowledge of, and interest in, elementary and secondary education with fair geographical and population representation.

Subcommittees were appointed to work on particular problem areas. They met several times and presented their ideas to the Commission.

The Commission, using the advice of subcommittees, plus their own resources and data, drew up a proposed plan. The proposed plan was the basis for hearings in all areas affected in the state. Following the official hearings, as required by law, the Commission drew up its final recommendations. The Commission drafted a bill that would provide legislation needed to implement the plan <sup>1</sup>

The proposed plan for reorganization of intermediate units in Oregon has not been officially adopted as yet.<sup>2</sup>

#### Pennsylvania

The 1965 General Assembly passed an Act (Act 83-A) that charged the State Board of Education to prepare a plan for intermediate units for Pennsylvania and to submit its plan to the General Assembly by January, 1967. It also appropriated funds to finance a study on the intermediate unit.

The Chairman of the State Board of Education appointed a State Committee on Intermediate Units consisting of five State Board members.

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<sup>1</sup>State Plan for Organizing Intermediate Education Districts, Intermediate Education District Commission (Salem, Oregon, 1968), pp. 142-147.

<sup>2</sup>Letter from Leo W. Myers, Administrative Assistant, Oregon Board of Education, Salem, Oregon, June 13, 1969.

Three separate subcommittees were also appointed to serve as task forces on specific topics: the role of the intermediate unit, legislation, and finance. Members of the overall State Board Committee served as chairmen for each task force committee.

To assist in the conduct of the study, three additional special groups were established. (1) General Advisory Committee composed of one representative from each of a number of statewide professional and lay associations and agencies; (2) Legislative Advisory Committee made up of members of the House committees on elementary, secondary, and higher education and the Senate Committee on Education; (3) DPI Resource Committee made up of staff members of the Pennsylvania Department of Public Instruction, appointed by the Superintendent of Public Instruction.

Public hearings were held and further study was conducted on several items. The study was completed, and presented to the State Board as a State Plan of Intermediate Units. The State Board adopted the study and its recommendations.<sup>1</sup>

The necessary legislation to implement the State Board's report has passed the House and is expected to pass the Senate. Pennsylvania hopes to have their statewide system of intermediate units to become effective June 1, 1970.<sup>2</sup>

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<sup>1</sup>Paul S. Christmas, "Developing a State Plan for Pennsylvania's Intermediate Units," *Journal on State School Systems Development*, (Summer, 1967) Vol. 1, No. 2, pp. 120-123.

<sup>2</sup>Letter from Severion Stefano, Secretary of the State Board of Education of the Commonwealth of Pennsylvania, Harrisburg, Pennsylvania, July 11, 1969.



## Texas

In 1965 the 59th Legislature passed a law (Senate Bill, 408) authorizing the State Board of Education to provide for the establishment and operation of Regional Education Media Centers in accordance with prescriptions specified in the act.

In 1967 a law was enacted which retained the establishment, operational procedures, and methods of financing of the 1965 law, and provided for Regional Education Service Centers. Before the 1967 law was enacted, however, steps were being taken to develop a regional structure for the state as authorized by the 1965 legislation. The State Education Agency drafted a tentative plan which was adopted by the State Board. Meetings were held in the tentatively mapped out regions to explain the plan to local school officials and to get their reactions. The plan was revised as a result of the regional meetings, and submitted to the State Board for approval. The plan, as adopted by the State Board, established 20 Regional Education Service Centers.<sup>1</sup>

## Washington

The legislature in 1965 passed Senate Bill 304. The intent and purpose of this act was to establish the methods, procedures and means necessary to reorganize existing offices of county superintendent of schools into intermediate district offices. This act charged the State Board of Education with establishing a statewide plan for intermediate districts. The State Board was to consider a plan submitted by the

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<sup>1</sup>Marlin L. Brockett, "The Regional Education Service Centers in Texas," Journal on State School Systems Development (Fall, 1967) Vol. 1, Number 3, pp. 164-166.

county boards of education and hold public hearings before adopting a statewide plan.<sup>1</sup>

In 1969 the legislature of Washington passed House Bill 419 which amended the 1965 statute. This amendment placed the responsibility on the State Board of Education to establish a system of intermediate school districts without voter approval.<sup>2</sup>

#### Wisconsin

The State Superintendent established a special committee to make a thorough study of the state's middle echelon of school organization and charged them with finding out what existed in this echelon and how it might be corrected. The recommendations of this committee, with modifications acceptable to the legislature, were enacted into law on June 12, 1964. It provided, among other things, for an established procedure for the creation and operation of "not more than 25" Cooperative Educational Service Agencies. These new regional agencies were to meet criteria adopted by a special state committee. Working with the guides adopted to assist with the determination of school district clusters and boundaries, the special state committee held a series of hearings in the different geographical areas of the state and then adopted a plan for 19 Cooperative Educational Service Agencies.<sup>3</sup>

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<sup>1</sup>State of Washington, 39th Regular Session, Chapter 139, Laws of 1965 (Senate Bill 304).

<sup>2</sup>Letter from Vern V. Leidle, Assistant Superintendent for Staff Services, State Department of Public Instruction, State of Washington.

<sup>3</sup>John R. Belton, "Wisconsin's New District Educational Service Agencies," Journal on State School Systems Development, Vol. 1, No. 4 (Winter, 1968) pp. 204-209.

## Wyoming

The Boards of Cooperative Educational Services are permitted by permissive legislation passed in 1969. The act sets forth the procedures for the organization and operation of the Cooperative Boards.<sup>1</sup> The State Board of Education was authorized to implement this act. According to Gillispie, because of the recent passage of this act there are no Cooperative Boards in operation.<sup>2</sup>

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<sup>1</sup>Laws of Wyoming, 1969, House Enrolled Act 82; OHB 219.

<sup>2</sup>Letter from Melvin H. Gillispie, Director, School Evaluation and Accreditation, Department of Education, State of Wyoming.

CHAPTER IV

SURVEY OF STATE PRACTICES RELATING  
TO REGIONAL EDUCATION CENTERS

The purpose of this chapter is to present data obtained from the questionnaires about the practices relating to regional units of the states that operate such units, and the judgments of professional educators on the effectiveness of the practices. The figures in this chapter are organized to show the states' practices and the judgments of the professional educators.

To obtain this data questionnaires were sent to state coordinators in the states that operate regional educational units and to selected executive directors of regional units in the same states. In choosing which executive directors to survey, an attempt was made to select, in each state, one who was executive director of a large-sized unit, one who was executive director of a medium-sized unit, and one who was executive director of a small-sized unit. In all, 43 questionnaires were mailed out and 31, or 72%, were returned completed. All of the states surveyed were represented by at least two returned questionnaires. A copy of the cover letter and the questionnaire sent to each respondent are shown in Appendix A.

The respondents were asked to do three things in completing the questionnaire: (1) To select, from a list of known state practices, the practice that most nearly described their state's practice. If their

state's practice was not listed they were asked to indicate their state's practice; (2) to circle a code letter at the right of the statement that most nearly described their professional judgment on the effectiveness of the practice; and (3) to briefly indicate the changes, if any, that were planned or needed, to make the regional units in their state more effective.

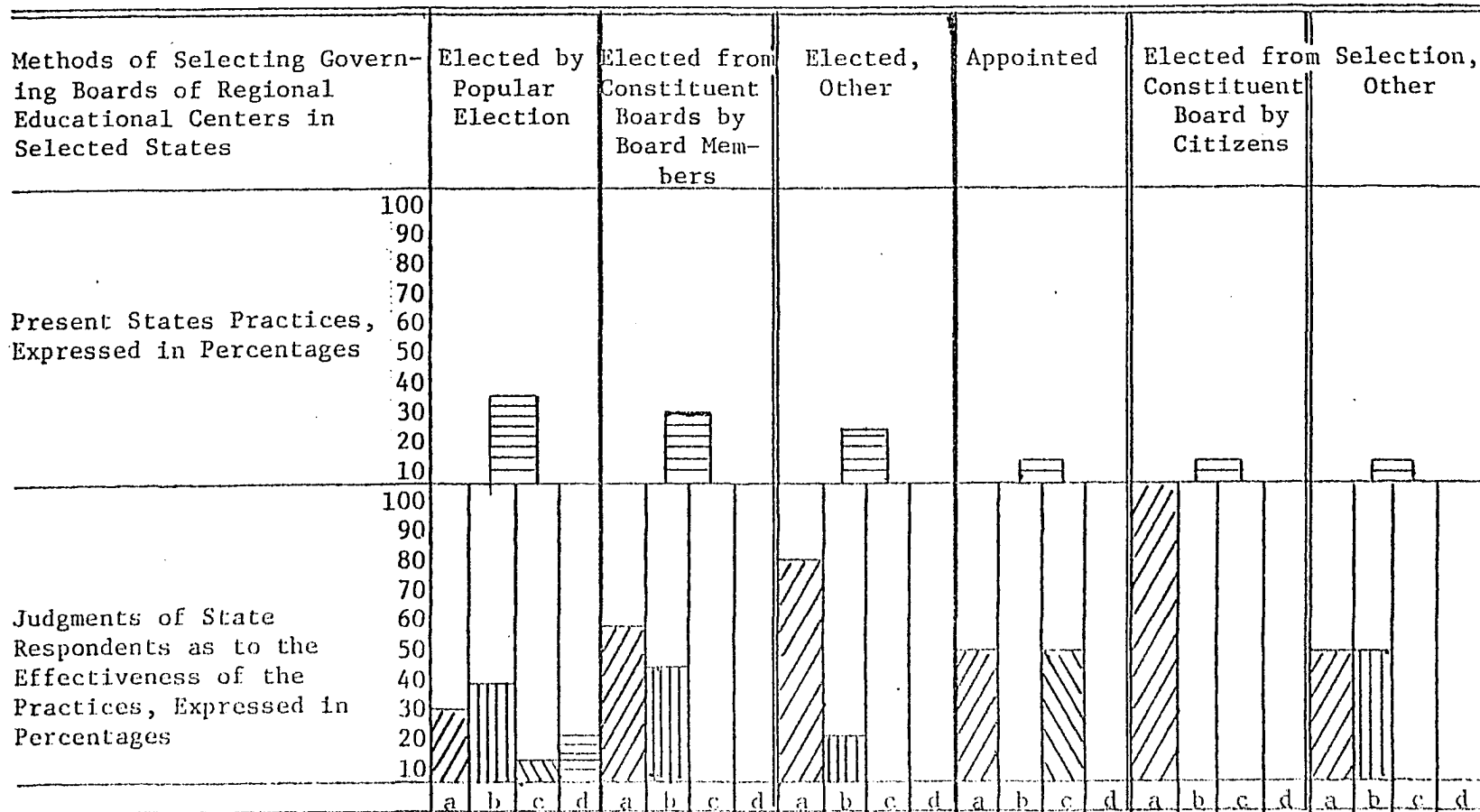
The questionnaire was divided into three major sections: (1) Regional Unit Organization and Control; (2) Programs and Services of Regional Units; and (3) Financing of Regional Units. At the end of each of the major sections the respondents were asked to add any comments or make any observations that they felt would be helpful to a state contemplating the establishment of regional units.

#### Organization and Control

Figure 1 portrays the practices relating to methods of selecting governing boards of Regional Educational Centers in selected states and judgments of state respondents as to the effectiveness of these practices, expressed in percentages. Ten respondents, (32%), indicated that their practice was to select the governing board by popular election. Of the respondents in this group that made professional judgment on this practice, one (10%) judged it unsatisfactory. The change specified by the respondent judging this practice unsatisfactory was from popular election to election from the constituent boards by the board members. Nine respondents (29%) indicated their practice of selection to be by election from the constituent boards by the board members. All of the respondents in this group judged this practice to be either satisfactory or to work fairly well. Six respondents (19%) indicated other practices

FIGURE 1

PRACTICES RELATING TO METHODS OF SELECTING GOVERNING BOARDS OF REGIONAL EDUCATIONAL CENTERS  
IN SELECTED STATES, AND JUDGMENTS OF STATE RESPONDENTS AS TO THE EFFECTIVENESS OF THESE  
PRACTICES, EXPRESSED IN PERCENTAGES



a - Satisfactory, no change anticipated  
b - Works fairly well, no change contemplated

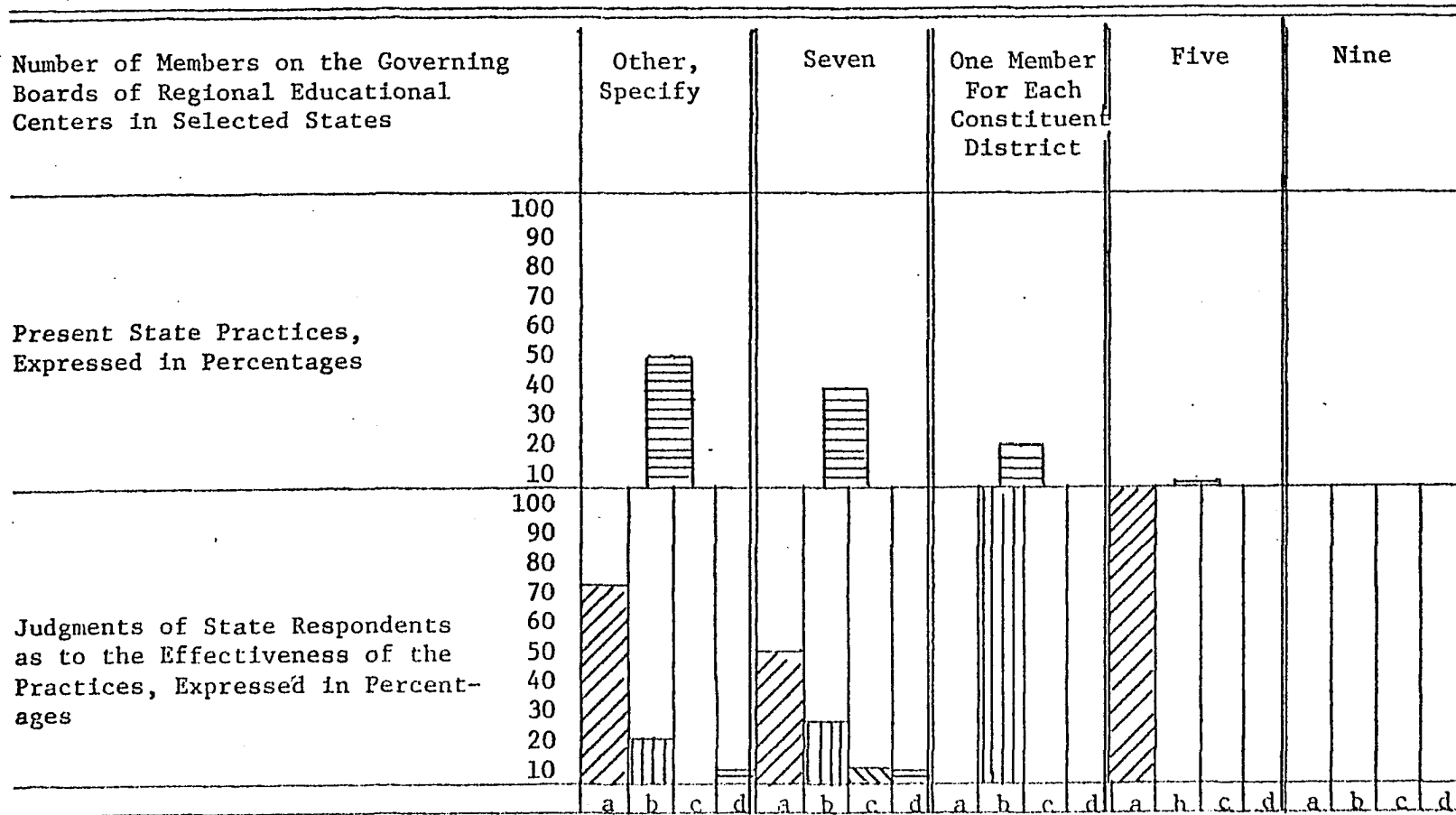
c - Unsatisfactory, change planned/needed  
d - Did not make judgment

in electing the governing board members and specified the following: (1) election from the citizens by the constituent board members, (2) election by constituent district superintendents, and (3) election by joint committee. All of the respondents in this group judged their practice satisfactory. Two respondents (6%) indicated the practice of selecting the governing board by appointment. However, one of the respondents judged this practice to be unsatisfactory and stated that this practice was being changed from an appointment to an election at large. Two respondents (6%) indicated that their practice was to select the governing board members by election from the constituent district boards by the citizens of the area. The respondents judged this practice to be satisfactory. Two respondents (6%) indicated other practices in the selection of the governing board members and specified the following: (1) combination of appointment and election and (2) elected by superintendents of 12-grade schools, and county superintendents who represent schools of less than 12 grades. The respondents in this group judged their practice satisfactory.

Figure 2 portrays the practices relating to the number of members on the governing boards. Fifteen respondents (50%) indicated different numbers or compositions than those listed on the questionnaire and specified the following: (1) one member from each county and four members at large; (2) the number varies; (3) 5, 7, or 9; (4) not less than 5 nor more than 9; however, each district must have one member even if the total membership goes over 9. All of the respondents in this group judged their practice to be satisfactory or to work fairly well. Twelve respondents (40%) indicated that seven (7) was the number

FIGURE 2

PRACTICES RELATING TO NUMBER OF MEMBERS ON THE GOVERNING BOARDS OF REGIONAL EDUCATIONAL CENTERS IN SELECTED STATES, AND JUDGMENTS OF STATE RESPONDENTS AS TO THE EFFECTIVENESS OF THESE PRACTICES, EXPRESSED IN PERCENTAGES



a - Satisfactory, no change anticipated  
b - Works fairly well, no change contemplated

c - Unsatisfactory, change planned/needed  
d - Did not make judgment



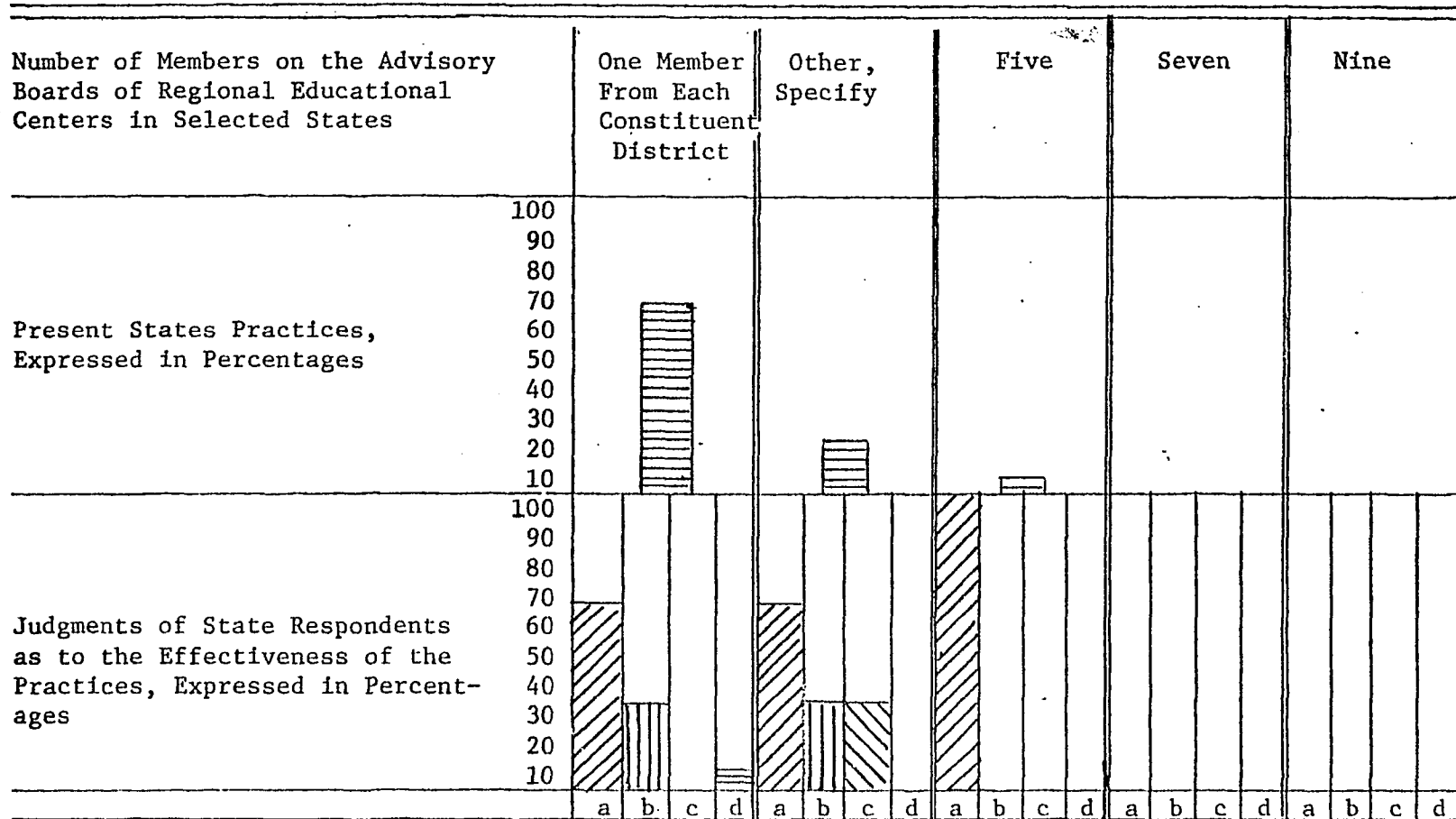
of members on their regional unit's governing board. Of the respondents in this group who made judgments on the effectiveness of this practice, one (8%) judged it unsatisfactory but did not specify the change that was planned or needed. Two respondents (7%) indicated that their practice was to have one governing board member for each constituent district board. The respondents judged this practice to work fairly well. One respondent (3%) indicated that five (5) was the number of members on their regional unit's governing board. He judged this practice to be satisfactory.

The respondents were asked if the regional units in their state had an advisory board. Thirteen respondents or (43%) indicated that their regional units had such boards. Figure 3 and Figure 4 are based on the information received from the thirteen respondents who said that their regional units had advisory boards. The respondents were then asked to indicate the number of members on their advisory board and the practices used in selecting them.

Figure 3 portrays the practices relating to the number of members on the advisory boards. Nine respondents (69%) indicated that the practice in their state was to have one representative from each constituent district. All of the respondents in this group judged this practice satisfactory or to work fairly well. Three respondents (23%) indicated practices not listed on the questionnaire and specified the following: (1) 50 members on the advisory board, (2) the superintendent from each constituent district is on the advisory board, and (3) one member from each subject area is on the advisory board. One respondent (33%) of the group who indicated practices not listed on the questionnaire judged

FIGURE 3

PRACTICES RELATING TO NUMBER OF MEMBERS ON THE ADVISORY BOARDS OF REGIONAL EDUCATIONAL CENTERS IN SELECTED STATES, AND JUDGMENTS OF STATE RESPONDENTS AS TO THE EFFECTIVENESS OF THESE PRACTICES, EXPRESSED IN PERCENTAGES



a - Satisfactory, no change anticipated  
b - Works fairly well, no change contemplated

c - Unsatisfactory, change planned/needed  
d - Did not make judgment

his practice unsatisfactory. However, the only change recommended was by one respondent who wanted definite or specific regulations in his state. One respondent (8%) indicated that the number of members on his regional unit's advisory board was five (5). He judged this practice satisfactory.

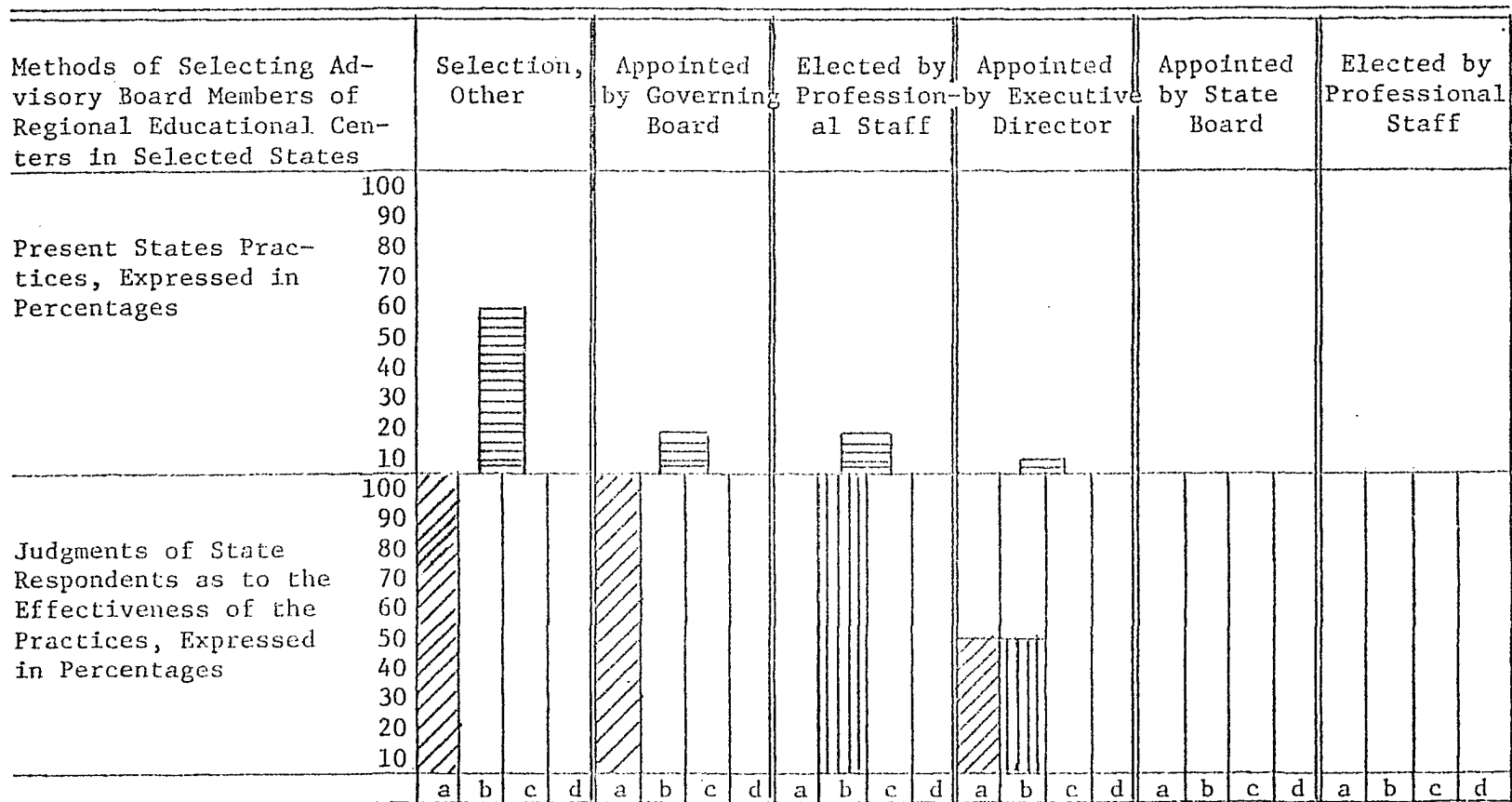
Figure 4 portrays the practices relating to the methods of selecting advisory board members. Seven respondents (58%) indicated practices other than those listed on the questionnaire and specified the following: (1) the superintendents of each constituent district, and (2) appointed by the local boards of the constituent districts. All of the respondents in this group judged their practice satisfactory. Two respondents (17%) indicated that the governing board of the regional unit appointed the advisory board. The respondents judged this practice to be satisfactory. Two respondents (18%) indicated that the advisory board for their regional unit was elected by the professional staff in each constituent district. The respondents judged this practice to be satisfactory or to work fairly well. One respondent (8%) indicated that the executive director of the regional unit appointed the advisory board and he judged this practice to work fairly well.

The respondents were asked if all local districts were required to join regional units, if they had special provisions for large school districts, and if local member districts had a right to withdraw from the regional units.

Figure 5 portrays the practices relating to the joining of Regional Educational Centers by local districts in selected states. Fifteen respondents (48%) indicated that all of the public schools in

FIGURE 4

PRACTICES RELATING TO METHODS OF SELECTING ADVISORY BOARD MEMBERS OF REGIONAL EDUCATIONAL CENTERS  
IN SELECTED STATES AND JUDGMENTS OF STATE RESPONDENTS AS TO THE EFFECTIVENESS OF THESE  
PRACTICES, EXPRESSED IN PERCENTAGES

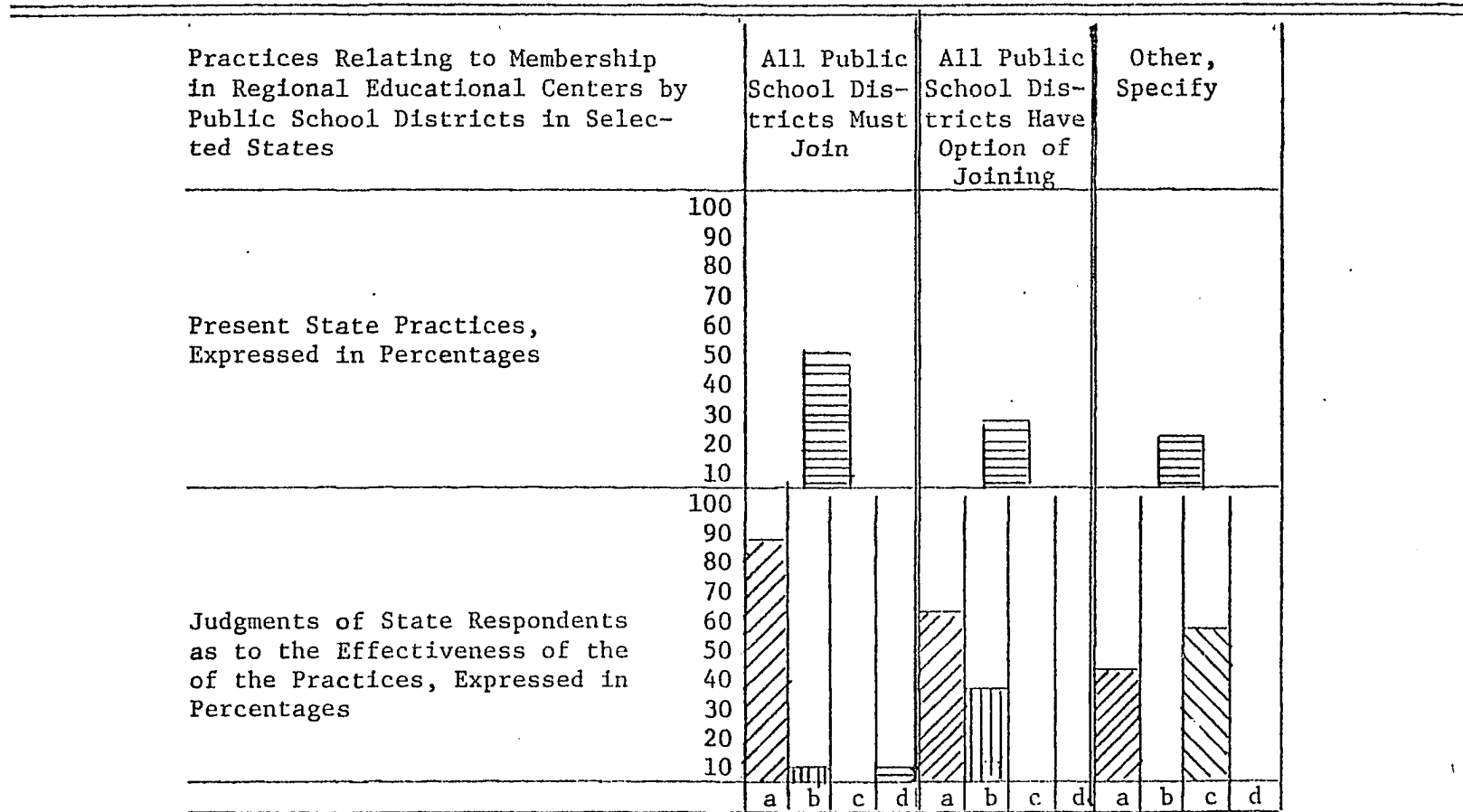


a - Satisfactory, no change anticipated  
b - Works fairly well, no change contemplated

c - Unsatisfactory, change planned/needed  
d - Did not make judgment

FIGURE 5

PRACTICES RELATING TO MEMBERSHIP IN REGIONAL EDUCATIONAL CENTERS BY PUBLIC SCHOOL DISTRICTS IN SELECTED STATES, AND JUDGMENTS OF STATE RESPONDENTS AS TO THE EFFECTIVENESS OF THESE PRACTICES, EXPRESSED IN PERCENTAGES



a - Satisfactory, no change anticipated  
b - Works fairly well, no change contemplated

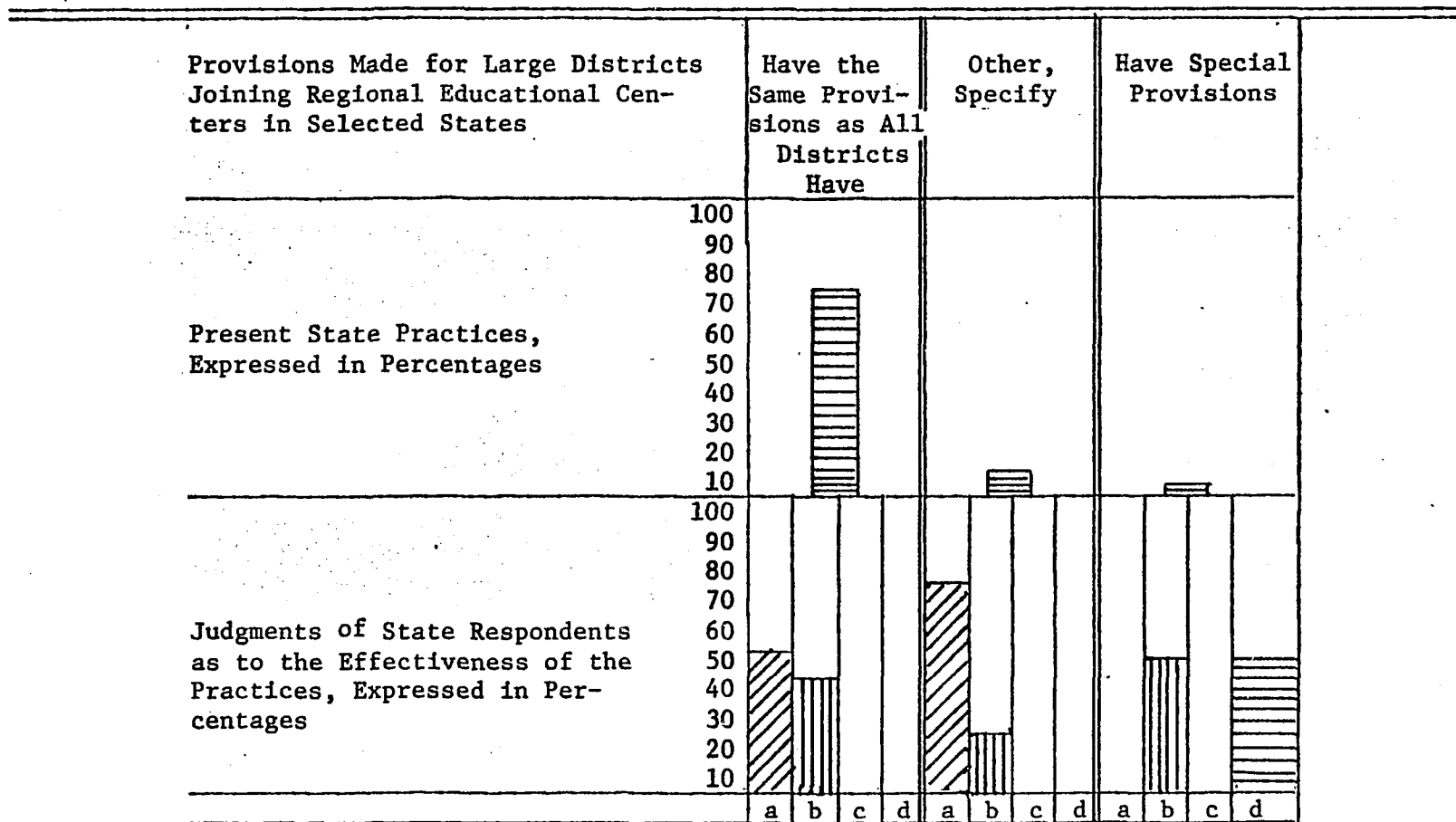
c - Unsatisfactory, change planned/needed  
d - Did not make judgment

their state were required to be a member of a regional unit, and judged this practice to be satisfactory or to work fairly well. Eight respondents (27%) indicated that districts in their state had the option of being a member of a regional unit. This practice was judged to be satisfactory or to work fairly well. Seven respondents (23%) indicated other practices and specified the following: (1) some districts were required to join and other were not, (2) county voters determine if the districts in their county have an option of joining, and (3) the districts are automatically members through their representation by their county superintendent. Fifty-seven percent of the respondents in this group judged their practice unsatisfactory. The changes specified by the respondents who judged their practice unsatisfactory are: (1) make it mandatory for all districts to join a regional unit, and (2) make it mandatory for all districts, except the very large ones, to join a regional unit.

Figure 6 portrays the practices relating to provisions for large districts joining Regional Educational Centers in selected states. Twenty-three respondents (84%) indicated that their state had the same provisions for the large districts as for all other school districts. All of the respondents in this group judged this practice to be satisfactory or to work fairly well. Four respondents (13%) indicated other practices in regard to large districts and specified, basically, the same type of practice. Their practice was to allow the large districts to have an option of joining or not joining a regional unit. All of the respondents in this group judged this practice to be satisfactory or to work fairly well. Two respondents (6%) indicated that their state

FIGURE 6

PRACTICES RELATING TO PROVISIONS FOR LARGE DISTRICTS JOINING REGIONAL EDUCATIONAL CENTERS IN SELECTED STATES, AND JUDGMENTS OF STATE RESPONDENTS AS TO THE EFFECTIVENESS OF THESE PRACTICES, EXPRESSED IN PERCENTAGES



a - Satisfactory, no change anticipated  
b - Works fairly well, no change contemplated

c - Unsatisfactory, change planned/needed  
d - Did not make judgment

had special provisions for the large districts and judged this practice to work fairly well.

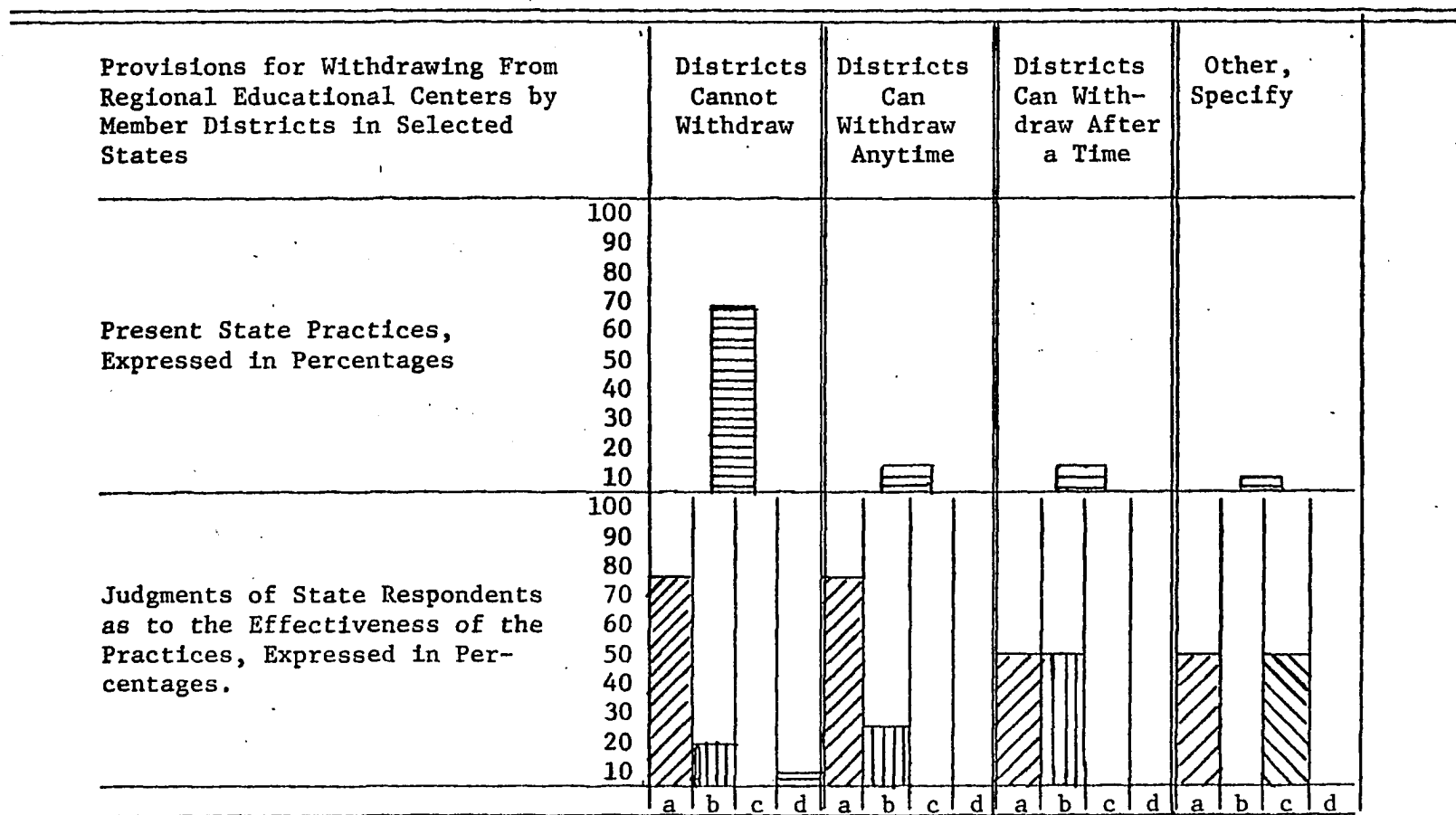
Figure 7 portrays the practices relating to provisions for withdrawing from Regional Educational Centers by member districts. Twenty respondents (67%) indicated that member districts in their state could not withdraw from regional units. This practice was judged to be satisfactory or to work fairly well. Four respondents (13%) indicated that their practice was to allow member districts to withdraw from regional units at anytime and judged this practice to be satisfactory or to work fairly well. Four respondents (13%) indicated that their practice was to allow member districts to withdraw from regional units after a length of time. This practice was judged to be satisfactory or to work fairly well. Two respondents (7%) indicated other practices and specified the following: (1) a whole county could vote to withdraw from a regional unit, and (2) districts could withdraw from a regional unit only to join another regional unit. The respondent reporting practice (1) judged it unsatisfactory. He specified the change needed was to "lock in" all the member districts. The respondent reporting practice (2) judged it satisfactory.

Figure 8 portrays the practices relating to criteria used in establishing Regional Educational Centers. Each criteria is based on a possible 31 responses. Six respondents (19%) indicated that their practice was to require a minimum total student population in the regional unit area. Three of the six respondents in this group specified the practice in their state was to require a minimum of 5,000 students; one specified a minimum student population of 10,000; and two specified



FIGURE 7

PRACTICES RELATING TO PROVISIONS FOR WITHDRAWING FROM REGIONAL EDUCATIONAL CENTERS BY MEMBER DISTRICTS IN SELECTED STATES, AND JUDGMENTS OF STATE RESPONDENTS AS TO THE EFFECTIVENESS OF THESE PRACTICES, EXPRESSED IN PERCENTAGES

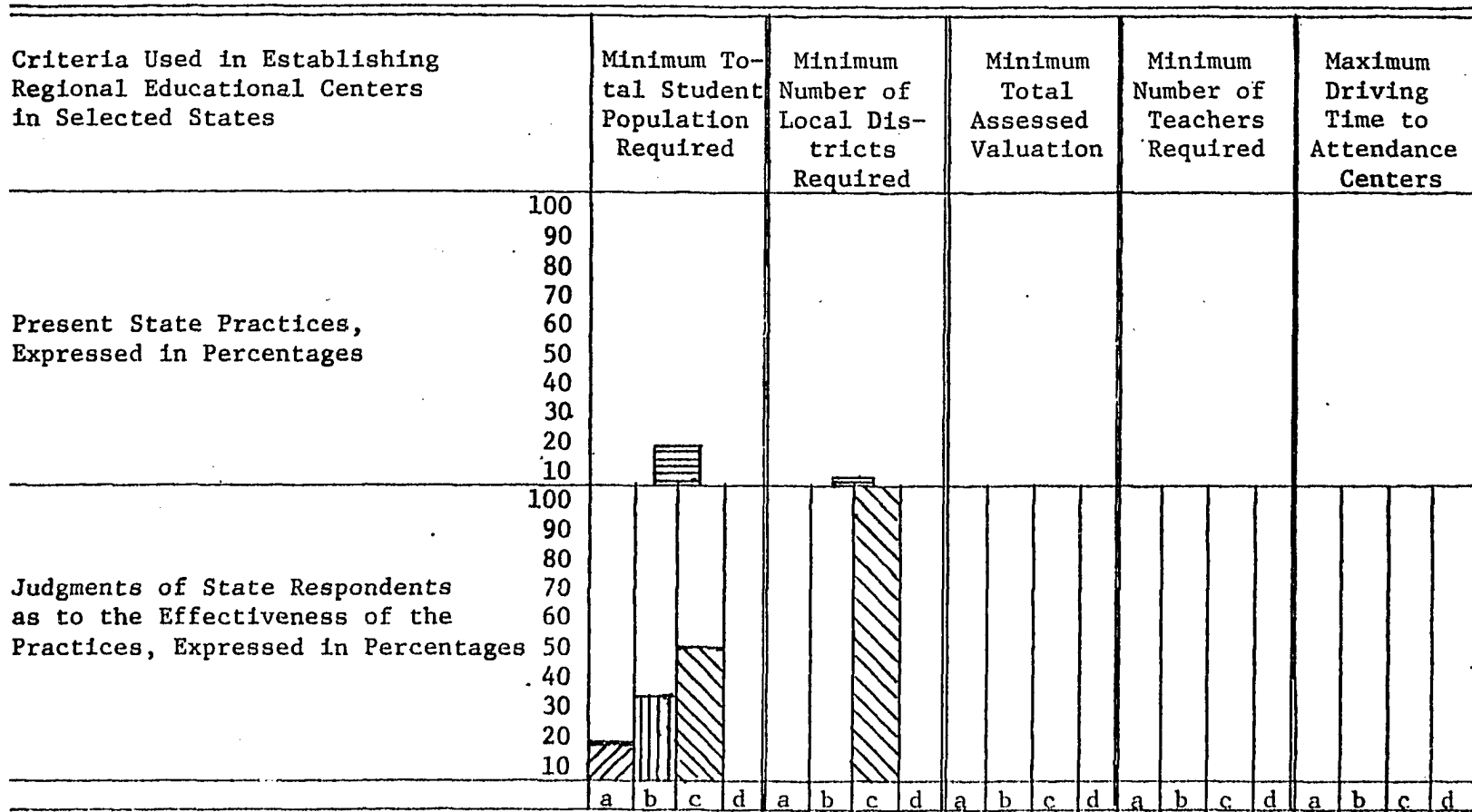


a - Satisfactory, no change anticipated  
b - Works fairly well, no change contemplated

c - Unsatisfactory, change planned/needed  
d - Did not make judgment

FIGURE 8

PRACTICES RELATING TO CRITERIA USED IN ESTABLISHING REGIONAL EDUCATIONAL CENTERS  
IN SELECTED STATES, AND JUDGMENTS OF STATE RESPONDENTS AS TO THE EFFECTIVENESS  
OF THESE PRACTICES, EXPRESSED IN PERCENTAGES



a - Satisfactory, no change anticipated  
b - Works fairly well, no change contemplated

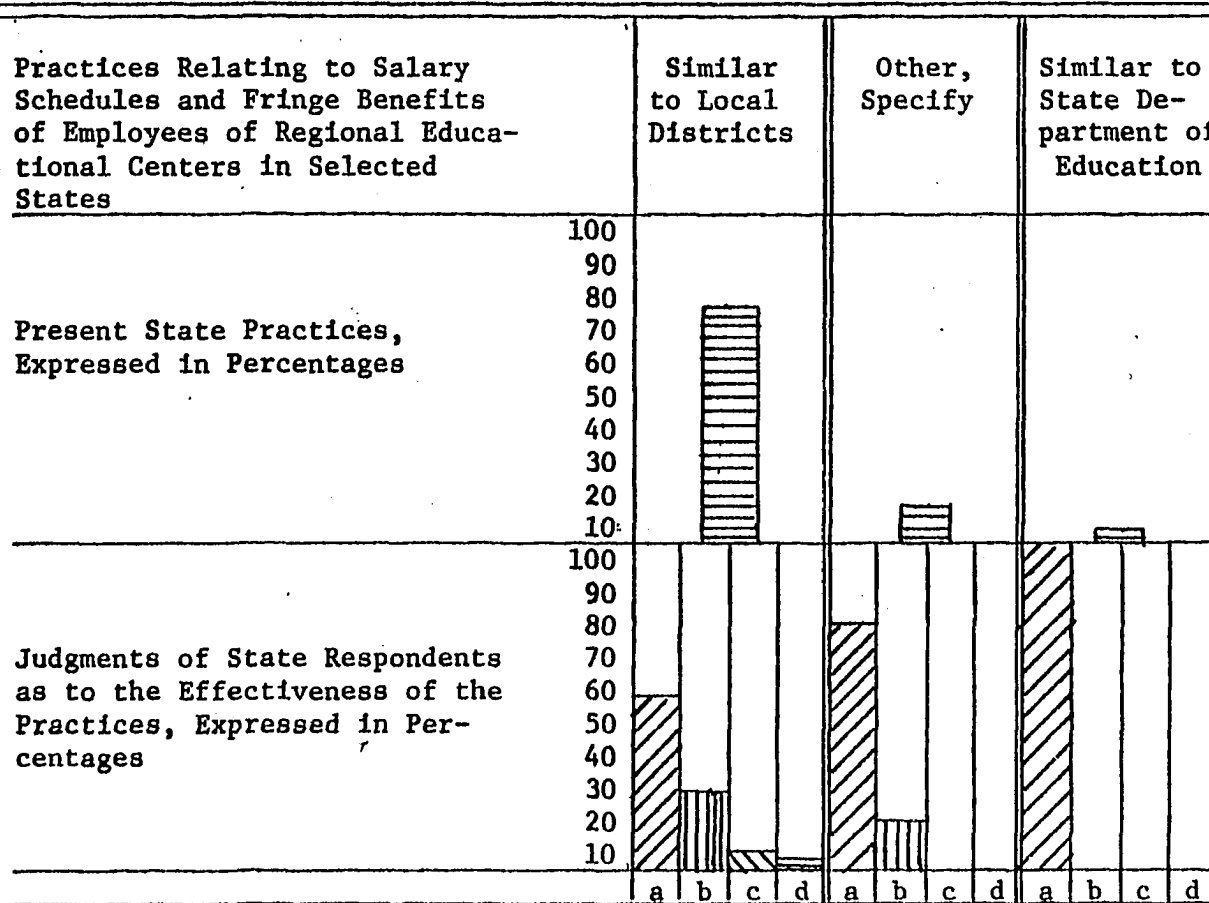
c - Unsatisfactory, change planned/needed  
d - Did not make judgment

that a potential of 15,000 was the minimum required in their state. Three of the respondents in this group judged their practice to be unsatisfactory. However, only two of the three who judged their practice to be unsatisfactory listed changes planned or needed. One respondent said that they were changing from a minimum of 5,000 to a minimum of probably 25,000, and one respondent said they needed a change from the minimum of 5,000 to at least 100,000. One respondent (3%) of the thirty-one respondents indicated that their practice was to require a total minimum number of districts to form a regional unit. He specified the number to be two or more. Minimum assessed valuation, minimum number of teachers in the constituent districts and maximum driving time from the regional unit center to the constituent district's attendance centers were not indicated by the respondents as requirements for establishing regional units.

Figure 9 portrays the practices relating to salary schedule and fringe benefits of employees. Twenty-four respondents (77%) indicated their practice to be that of making salary schedules and fringe benefits similar to those of the local districts. Eight percent of the respondents in this group judged this practice unsatisfactory and specified the change needed to allow higher salaries to be paid in order to attract better qualified professional people. Five respondents (16%) indicated other practices and specified the following: (1) salary schedule and fringe benefits set by the board with local district schedules and the state department schedule considered, (2) somewhat higher than either the local district schedules and the state department schedule, (3) normally the pay is higher than local school districts, and

FIGURE 9

PRACTICES RELATING TO SALARY SCHEDULES AND FRINGE BENEFITS OF EMPLOYEES OF REGIONAL EDUCATIONAL CENTERS IN SELECTED STATES, AND JUDGMENTS OF STATE RESPONDENTS AS TO THE EFFECTIVENESS OF THESE PRACTICES, EXPRESSED IN PERCENTAGES



a - Satisfactory, no change anticipated  
b - Works fairly well, no change contemplated

c - Unsatisfactory, change planned/needed  
d - Did not make judgment

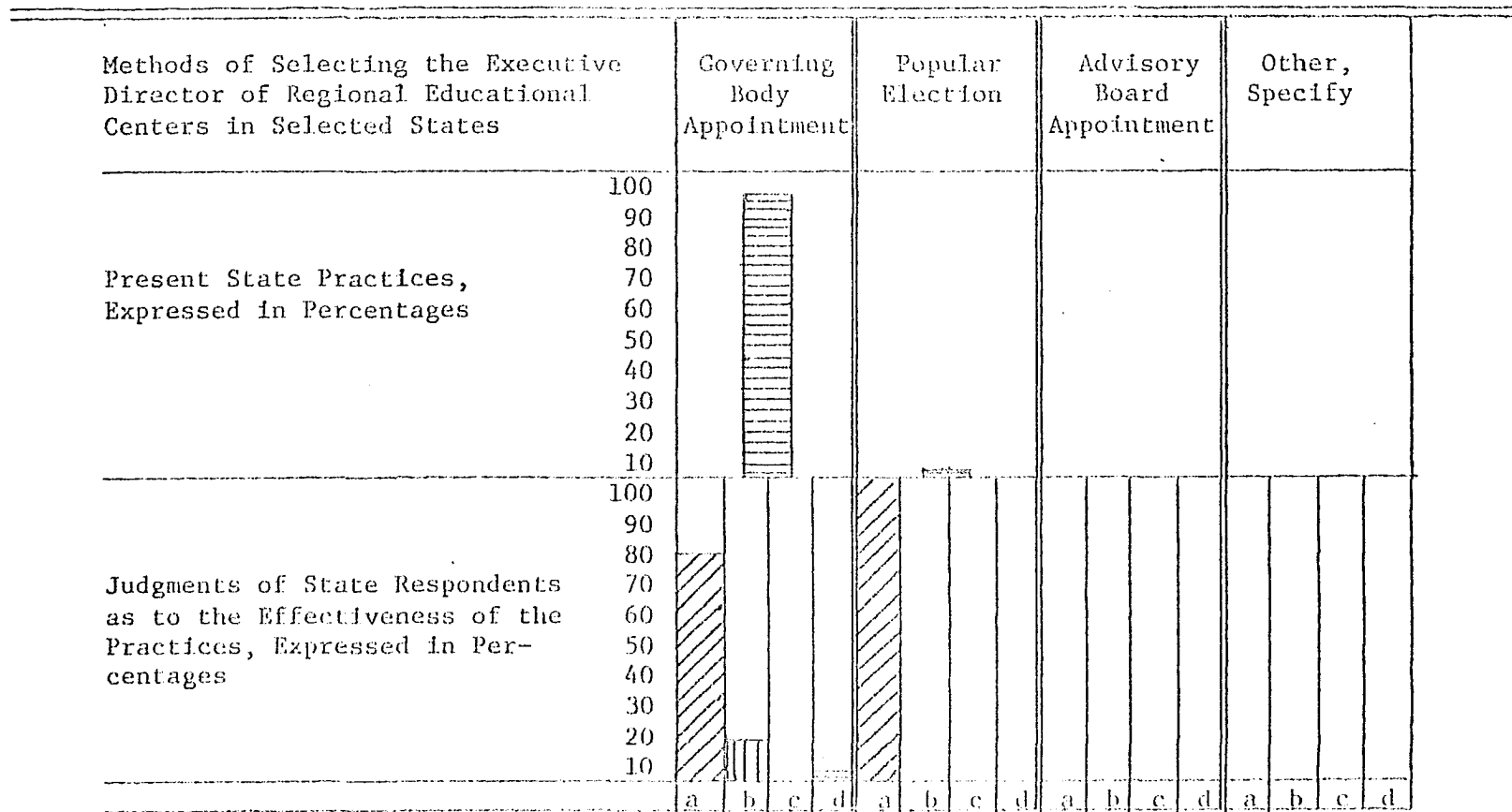
(4) negotiated. The respondents in this group judged their practice to be satisfactory or to work fairly well. Two respondents (6%) indicated that the salary schedule and fringe benefits were similar to the state department of education and judged this practice to be satisfactory.

Figure 10 portrays the practices relating to methods of selecting the executive director. Thirty respondents (97%) indicated that the practice in their state was to select the executive director by a governing body appointment. This practice was judged to be satisfactory or to work fairly well. One respondent (3%) indicated that their executive director is by law the Superintendent of the schools of the area. He judged this practice satisfactory.

Figure 11 portrays the practices relating to determining the salary range of the executive director. Twenty-three respondents (74%) indicated that the practice in their state was to allow the governing body of the regional unit to set the salary range of the executive director. The respondents judged this practice to be satisfactory or to work fairly well. Five respondents (16%) indicated other practices in setting the salary range of the executive director and specified the following: (1) legislation sets the minimum and the governing board can increase it, (2) it was set by statute, and (3) the salary range of the executive director was in line with local salary guides. All of the respondents in this group judged their practice to be satisfactory or to work fairly well. Three respondents (10%) indicated that the practice in their state was for the legislation to control the salary range of the executive director. This practice was judged to be satisfactory.

FIGURE 10

PRACTICES RELATING TO METHODS OF SELECTING THE EXECUTIVE DIRECTOR OF REGIONAL EDUCATIONAL CENTERS  
IN SELECTED STATES, AND JUDGMENTS OF STATE RESPONDENTS AS TO THE EFFECTIVENESS  
OF THESE PRACTICES, EXPRESSED IN PERCENTAGES

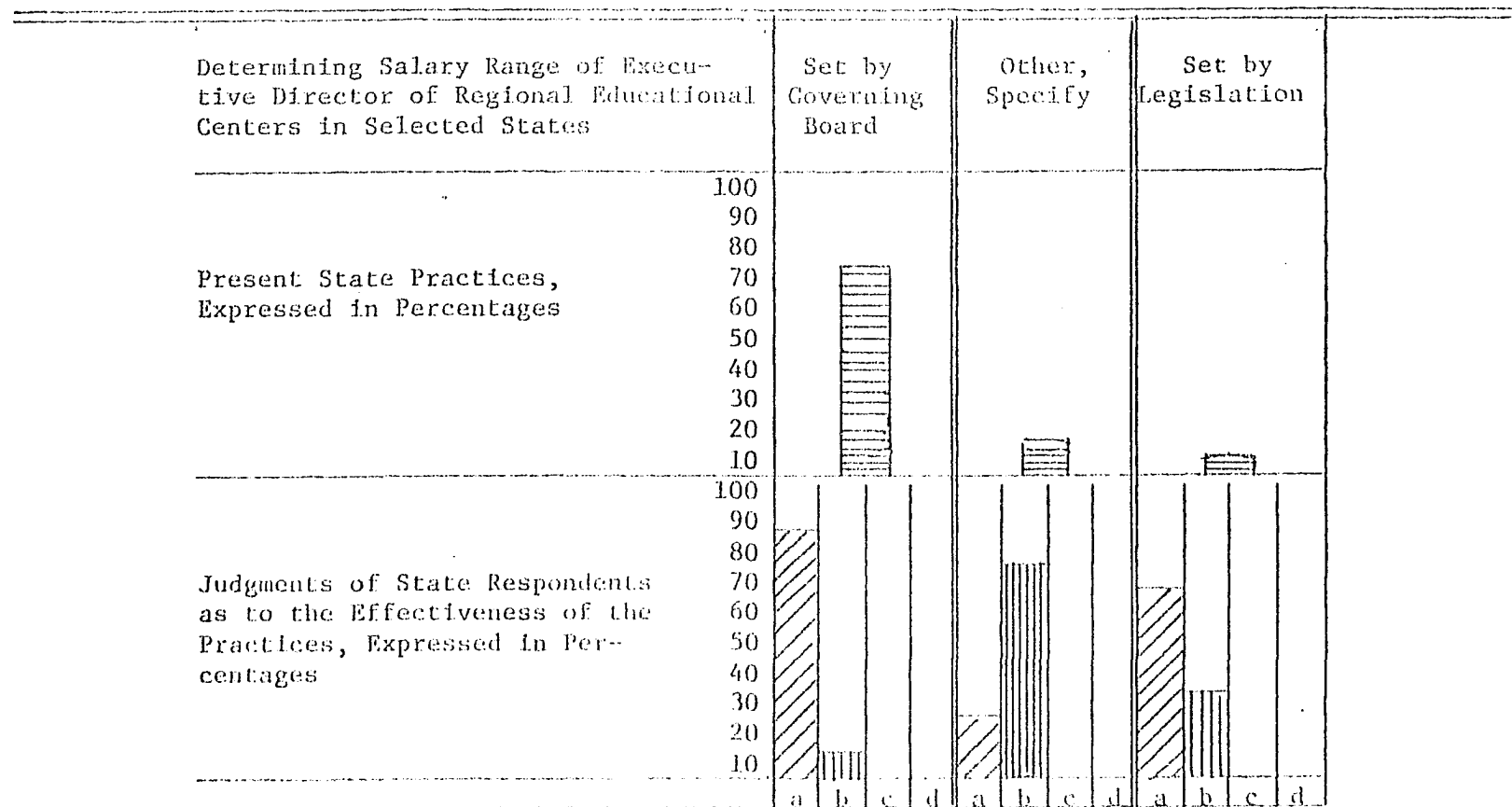


a - Satisfactory, no change anticipated  
b - Works fairly well, no change contemplated

c - Unsatisfactory, change planned/needed  
d - Did not make judgment

FIGURE 11

PRACTICES RELATING TO DETERMINING SALARY RANGE OF EXECUTIVE DIRECTOR OF REGIONAL EDUCATIONAL CENTERS IN SELECTED STATES, AND JUDGMENT OF STATE RESPONDENTS AS TO THE EFFECTIVENESS OF THESE PRACTICES, EXPRESSED IN PERCENTAGES



a - Satisfactory, no change anticipated  
b - Works fairly well, no change contemplated

c - Unsatisfactory, change planned/needed  
d - Did not make judgment

Figure 12 portrays the practices relating to direction of basic responsibility. Twenty-three respondents (74%) indicated that the basic responsibility of regional units in their state was to the local districts with some responsibility to the state department of education. This practice was judged to be satisfactory or to work fairly well. Four respondents (13%) indicated that the basic responsibility of the regional units in their state was to the state department of education with some responsibility to the local districts. This practice was judged to be satisfactory or to work fairly well. Two respondents (6%) indicated that the basic responsibility was to the local districts with no responsibility to the state department of education. This practice was judged to be satisfactory. One respondent (3%) indicated that the basic responsibility of the regional units in his state was to the state department of education with no responsibility to the local districts and judged this practice satisfactory. One respondent (3%) indicated that it was possible to have a combination, with basic responsibility in some areas to the state department of education with some responsibility to local districts, and basic responsibility in some areas to the local districts with some responsibility to the state department of education. He judged this practice to be satisfactory.

Figure 13 portrays the practices relating to State Legislators delegating responsibility for setting up a statewide system of Regional Educational Centers. Fourteen respondents (45%) indicated that the responsibility for setting up a statewide system of regional units was given to the state department of education. All but one of the respondents in this group judged this practice to be satisfactory or to work



FIGURE 12

PRACTICES RELATING TO DIRECTION OF BASIC RESPONSIBILITY OF REGIONAL EDUCATIONAL CENTERS  
IN SELECTED STATES, AND JUDGMENTS OF STATE RESPONDENTS AS TO THE EFFECTIVENESS  
OF THESE PRACTICES, EXPRESSED IN PERCENTAGES

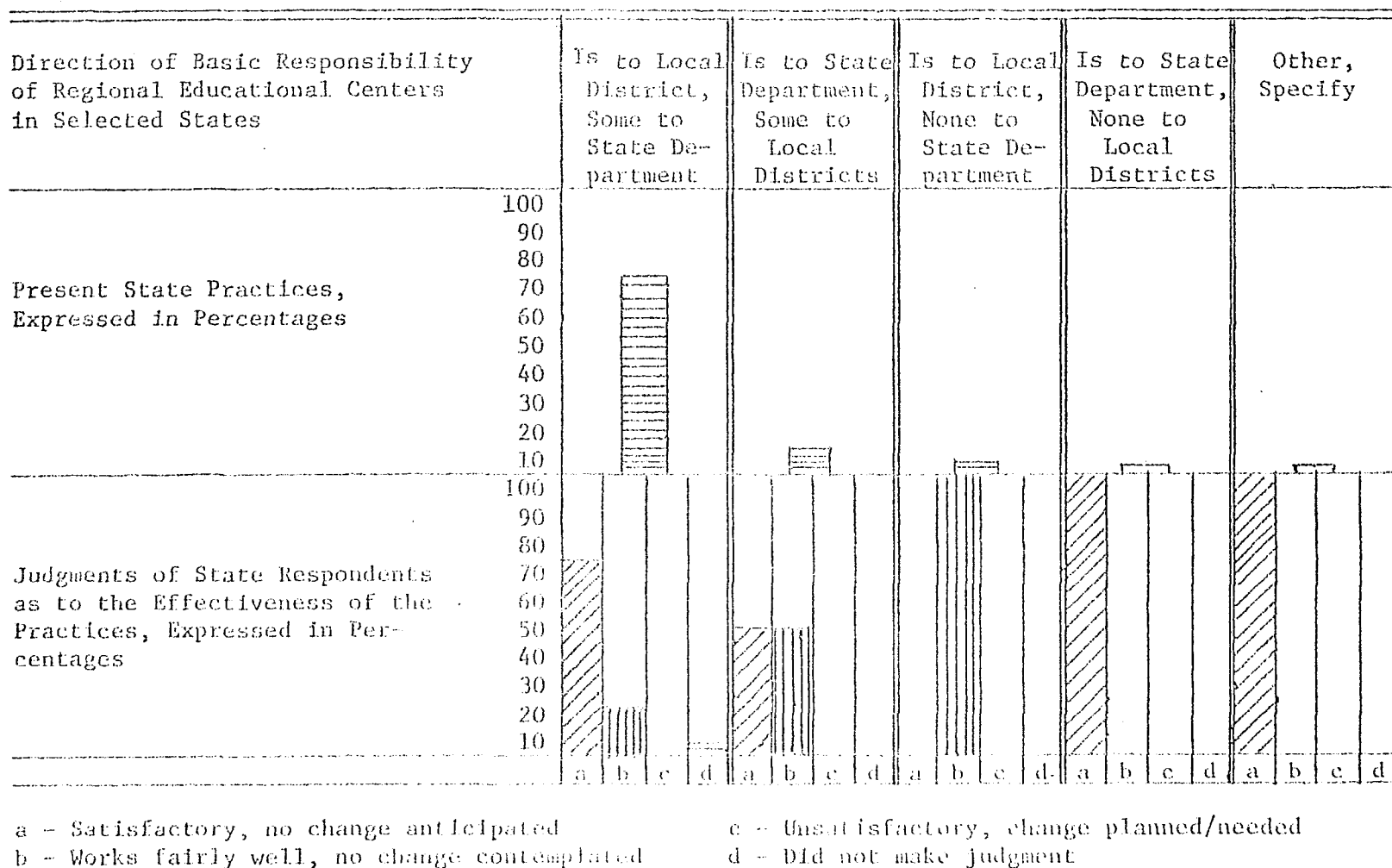
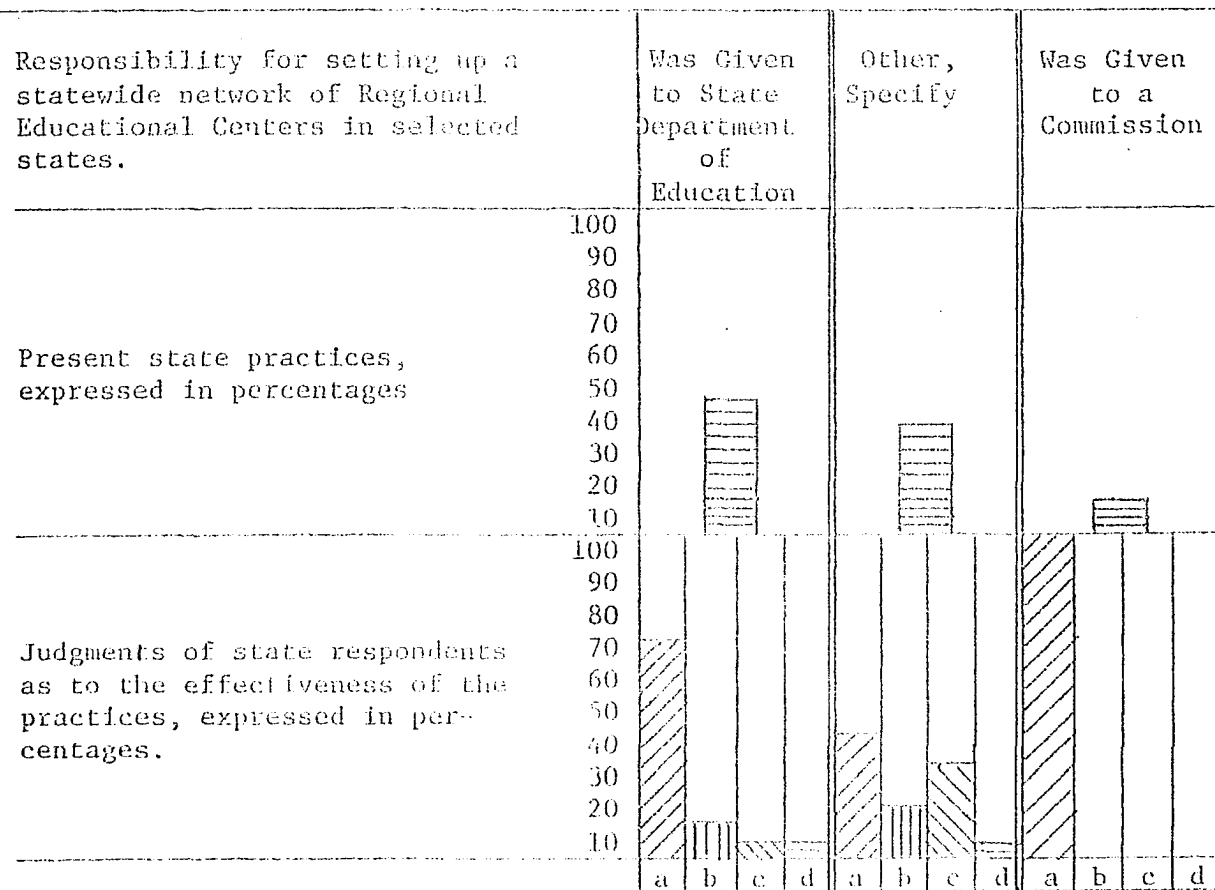


FIGURE 13

PRACTICES RELATING TO STATE LEGISLATORS DELEGATING RESPONSIBILITY FOR SETTING UP A STATEWIDE NETWORK OF REGIONAL EDUCATIONAL CENTERS IN SELECTED STATES, AND JUDGMENTS OF STATE RESPONDENTS AS TO THE EFFECTIVENESS OF THESE PRACTICES, EXPRESSED IN PERCENTAGES



a - Satisfactory, no change anticipated  
b - Works fairly well, no change contemplated

c - Unsatisfactory, change planned/needed  
d - Did not make judgment

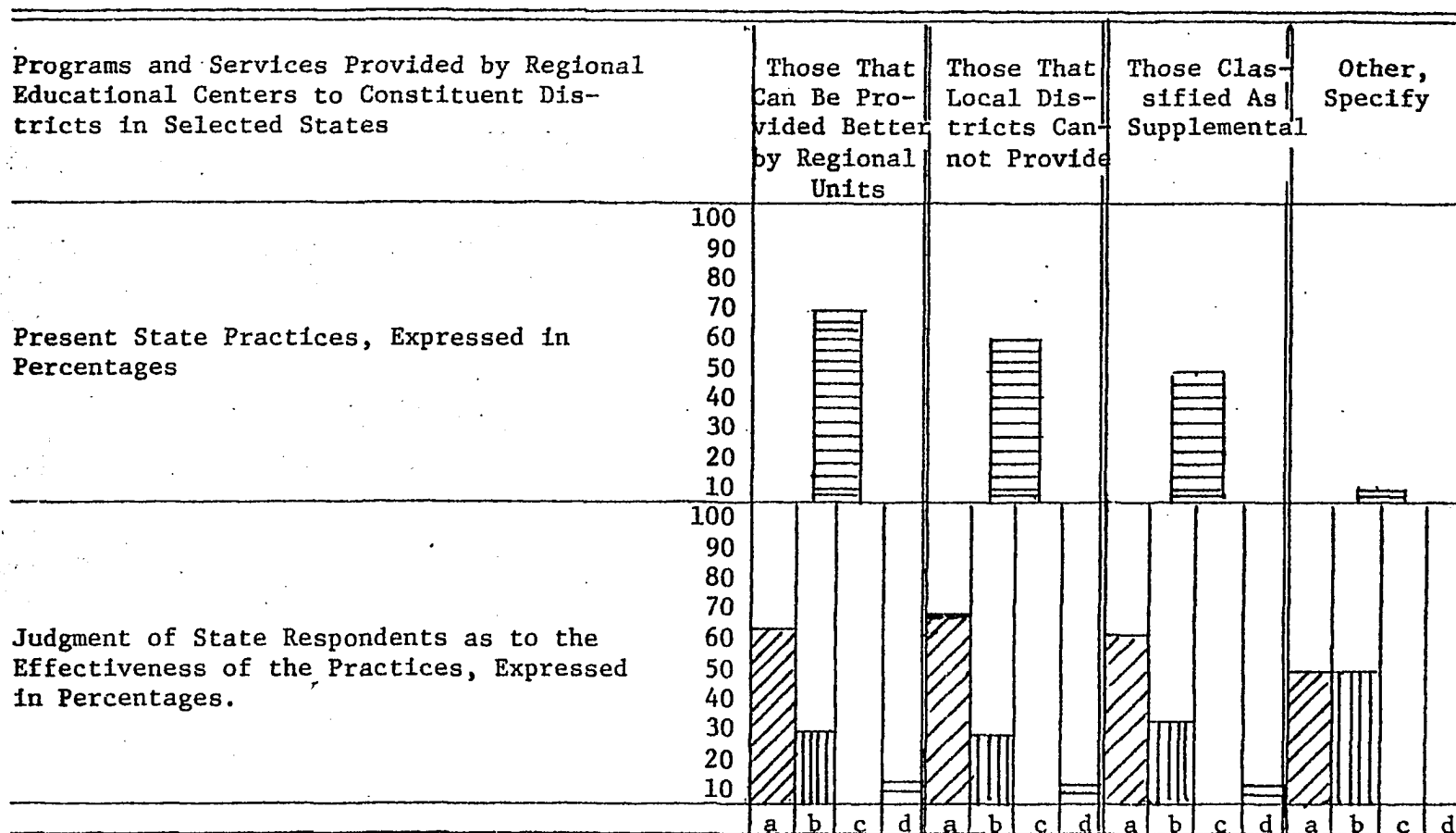
fairly well. However, the respondent that judged this practice to be unsatisfactory did not specify the change planned or needed. Twelve respondents (39%) indicated practices other than those listed on the questionnaire and specified the following: (1) done by statute, (2) a commission was created by the legislature, reporting to the state department of education, and the state department of education making the final decision, (3) governor's commission working in conjunction with the state education agency, and (4) permissive legislation so they grew up like topsy. Of the respondents in the latter group, eight judged their practices to be satisfactory or to work fairly well, and four judged it to be unsatisfactory. They specified the following changes or made the following comments: (1) grew like topsy--want it changed to where a commission is created for this purpose, (2) legislated into being and new legislation is being developed to completely reorganize by July 1, 1971, (3) no definite plan, and (4) very permissive, thus working very slowly. Five respondents (16%) indicated that the practice in their state was to give to a commission, created for the purpose, the responsibility for setting up a statewide system of regional units. This practice was judged to be satisfactory or to work fairly well.

#### Programs and Services of Regional Units

Figure 14 portrays the practices relating to programs and services provided by Regional Educational Centers to constituent districts. The distributions under each classification are based on a possible thirty-one (31) as many respondents indicated more than one classification for their regional unit. Twenty-one respondents (68%) indicated that the programs and services provided to the local districts by the

FIGURE 14

PRACTICES RELATING TO PROGRAMS AND SERVICES PROVIDED BY REGIONAL EDUCATIONAL CENTERS TO CONSTITUENT DISTRICTS IN SELECTED STATES, AND JUDGMENTS OF STATE RESPONDENTS AS TO THE EFFECTIVENESS OF THESE PRACTICES, EXPRESSED IN PERCENTAGES.



a - Satisfactory, no change anticipated  
b - Works fairly well, no change contemplated

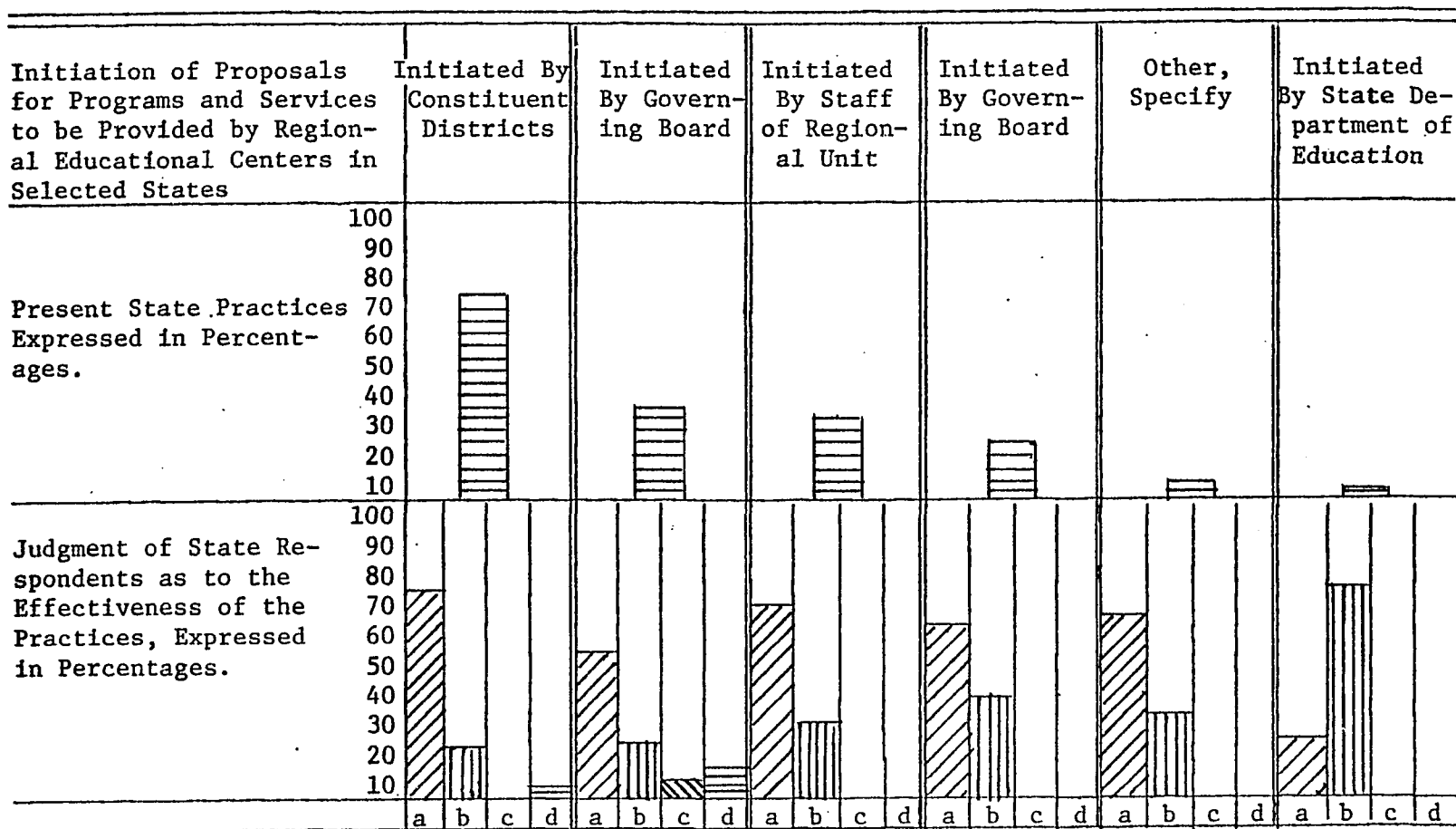
c - Unsatisfactory, change planned/needed  
d - Did not make judgment

regional units are those that can be provided more economically by the regional unit. All of the respondents in this group judged this practice to be satisfactory or to work fairly well. Eighteen respondents (58%) indicated that the programs and services provided to the local districts by the regional units are those that the local districts cannot provide for themselves. All of the respondents in this group judged this practice to be satisfactory or to work fairly well. Fifteen respondents (48%) indicated that the programs and services provided to the local districts by the regional units are those classified as supplemental. All of the respondents in this group judged this practice to be satisfactory or to work fairly well. Two respondents (6%) indicated practices other than those listed on the questionnaire and specified the following: (1) as contracted by local district based on needs assessment, and (2) the total range of those listed on the questionnaire. The respondents in this group judged their practice to be satisfactory or to work fairly well.

Figure 15 portrays the practices relating to initiation of proposals for programs and services to be provided by Regional Educational Centers. Twenty-three respondents (74%) indicated that local school districts, through their administrators, could initiate proposals for programs and services to be offered by regional units. This practice was judged to be satisfactory or to work fairly well. Thirteen respondents (35%) indicated that the governing body of the regional unit could initiate proposals for programs and services. All but one of the respondents in this group judged this practice to be satisfactory. The respondent that judged this practice unsatisfactory wanted it changed

FIGURE 15

PRACTICES RELATING TO INITIATION OF PROPOSALS FOR PROGRAMS AND SERVICES TO BE PROVIDED BY REGIONAL EDUCATIONAL CENTERS IN SELECTED STATES, AND JUDGMENTS AS TO THE EFFECTIVENESS OF THESE PRACTICES, EXPRESSED IN PERCENTAGES



a - Satisfactory, no change anticipated  
b - Works fairly well, no change contemplated

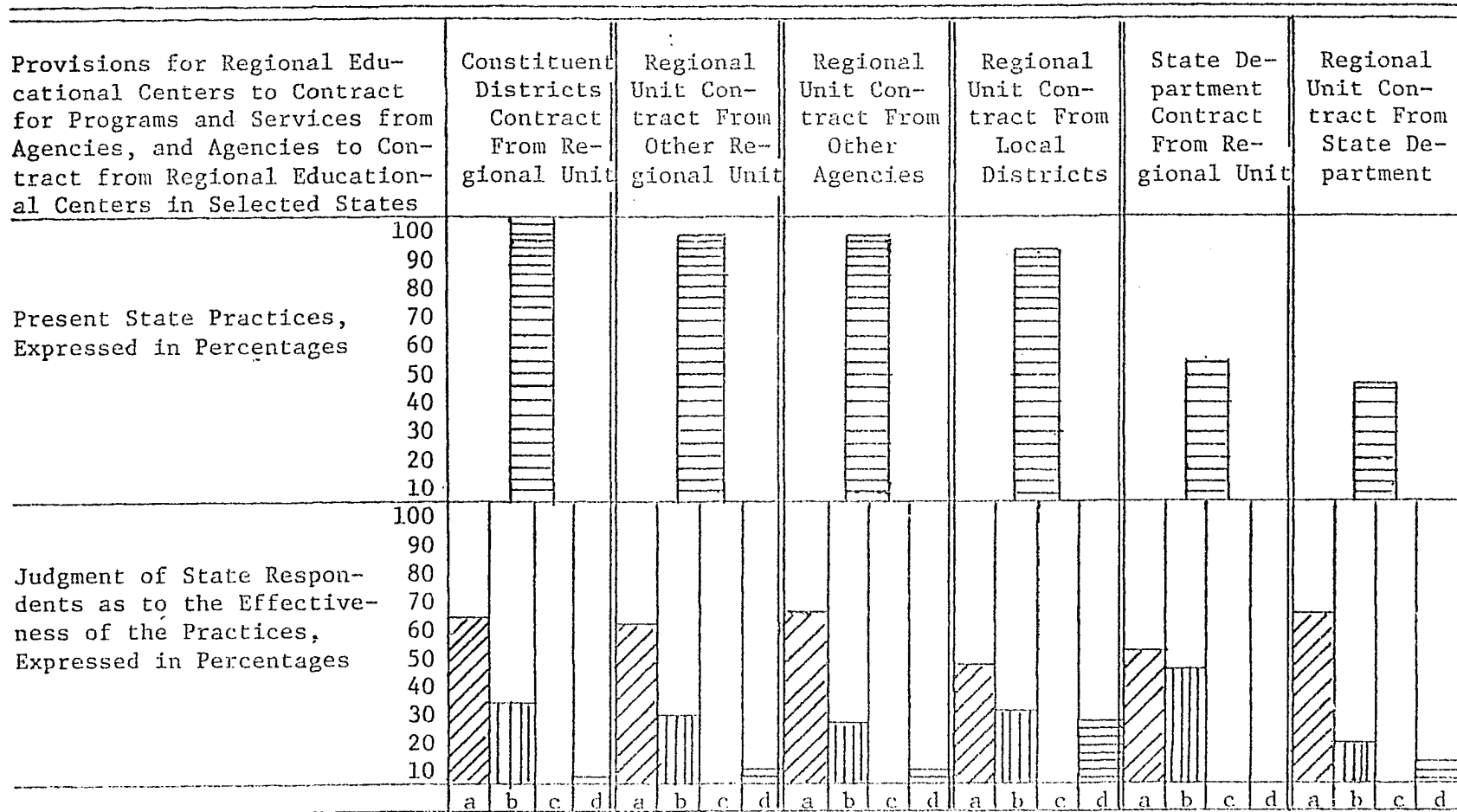
c - Unsatisfactory, change planned/needed  
d - Did not make judgment

to include more initiative by the state department of education and the advisory board. Ten respondents (32%) indicated that the regional units, after surveys were made, could initiate proposals for programs and services to be offered to local districts. This practice was judged to be satisfactory or to work fairly well. Four respondents (13%) indicated that the state department of education could initiate proposals for programs and services to be provided by regional units. This practice was judged to be satisfactory or to work fairly well. Three respondents (10%) indicated other practices and specified the following: (1) all of the groups listed on the questionnaire could initiate proposals plus the legislature, (2) broadly represented committees, and (3) the advisory board and local districts make recommendations to the governing board which actually determines what will be offered. The respondents in this group judged their practice to be satisfactory or to work fairly well.

Figure 16 portrays the practices relating to provisions for Regional Educational Centers to contract for programs and services. The percentages in each case are based on a possible 100%. Thirty-one respondents (100%) indicated that individual districts could contract, apart from regular procedures, certain services and programs from regional units. This practice was judged to be satisfactory or to work fairly well. Thirty respondents (97%) indicated that they had provisions for regional units to contract services from other regional units. This practice was judged to be satisfactory or to work fairly well. Thirty respondents (97%) indicated that they had provisions in their state that allowed regional units to contract for services from other

FIGURE 16

PRACTICES RELATING TO PROVISIONS FOR REGIONAL EDUCATIONAL CENTERS TO CONTRACT FOR PROGRAMS AND SERVICES IN SELECTED STATES, AND JUDGMENTS OF STATE RESPONDENTS AS TO THE EFFECTIVENESS OF THESE PRACTICES, EXPRESSED IN PERCENTAGES



a - Satisfactory, no change anticipated  
b - Works fairly well, no change contemplated

c - Unsatisfactory, change planned/needed  
d - Did not make judgment

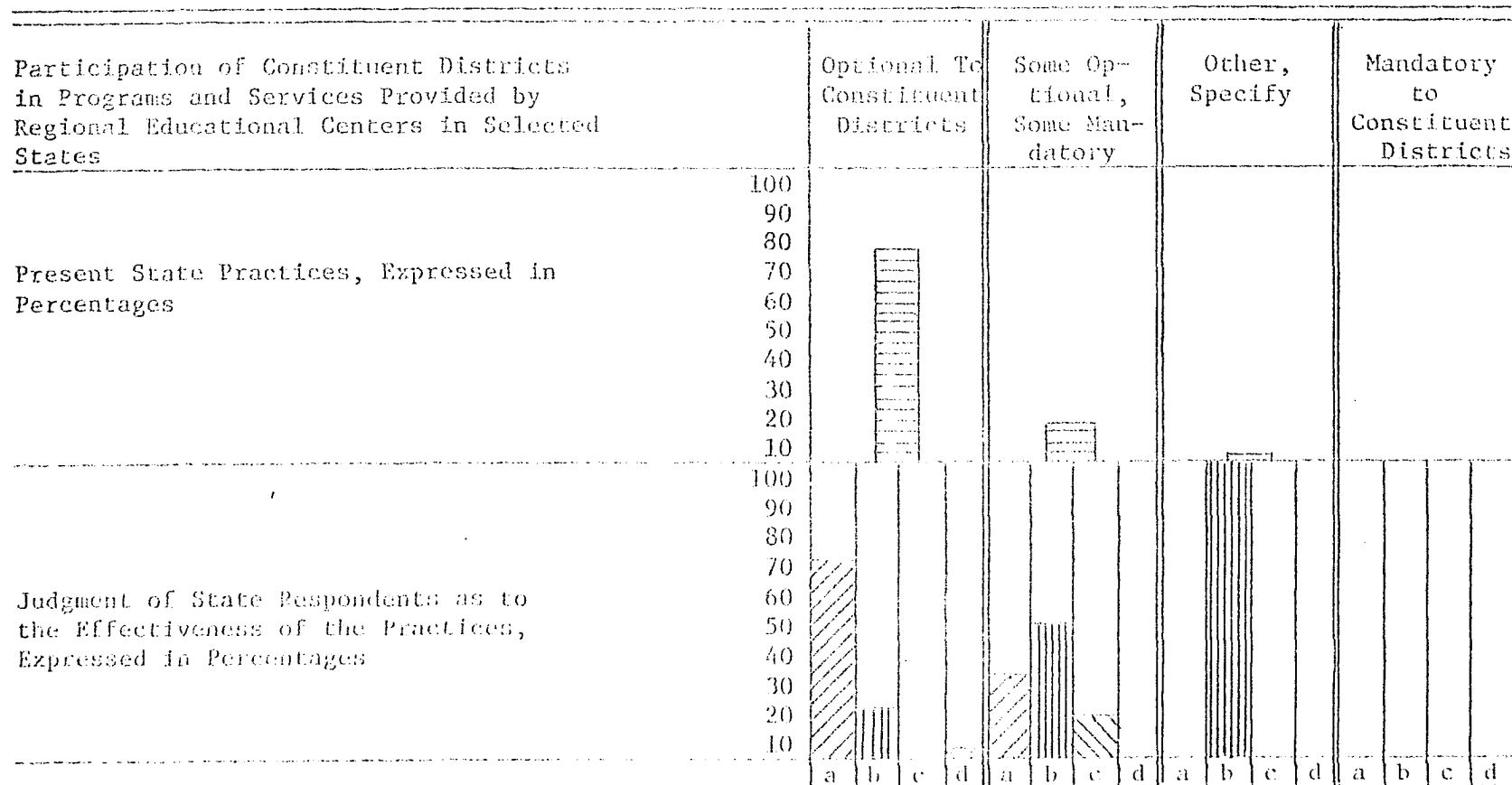


agencies such as colleges and universities. This practice was judged to be satisfactory or to work fairly well. Twenty-nine respondents (94%) indicated that provisions were made for regional units to contract for certain services and programs from local districts. This practice was judged to be satisfactory or to work fairly well. Seventeen respondents (55%) indicated that they had provisions for the state department of education to contract services from the regional unit. This practice was judged to be satisfactory or to work fairly well. Fifteen respondents (48%) indicated that they had provisions for the regional units to contract for services from the state department and judged this practice to be satisfactory or to work fairly well.

Figure 17 portrays the practices relating to participation of constituent districts in programs and services provided by Regional Educational Centers. None of the respondents indicated that it was mandatory for all of the local districts to participate in the programs and services of the regional units. Twenty-four respondents (77%) indicated that participation in the programs and services offered by the regional units was optional to the local school districts. This practice was judged to be satisfactory or to work fairly well. Six respondents (19%) indicated that participation in some programs and services was optional. Five of the respondents in this group judged this practice to be satisfactory and one respondent in this group judged this practice to be unsatisfactory. The respondent that judged this practice to be unsatisfactory wanted it changed from making some optional to making all mandatory. One respondent (3%) indicated that two-thirds of the districts having 50% of ADM must approve a program or

FIGURE 17

PRACTICES RELATING TO PARTICIPATION OF CONSTITUENT DISTRICTS IN PROGRAMS AND SERVICES PROVIDED  
BY REGIONAL EDUCATIONAL CENTERS IN SELECTED STATES AND JUDGMENTS OF STATE RESPONDENTS  
AS TO THE EFFECTIVENESS OF THESE PRACTICES, EXPRESSED IN PERCENTAGES



a - Satisfactory, no change anticipated  
b - Works fairly well, no change contemplated

c - Unsatisfactory, change planned/needed  
d - Did not make judgment

service and then the districts had the option of participating or not participating. This practice was judged to work fairly well.

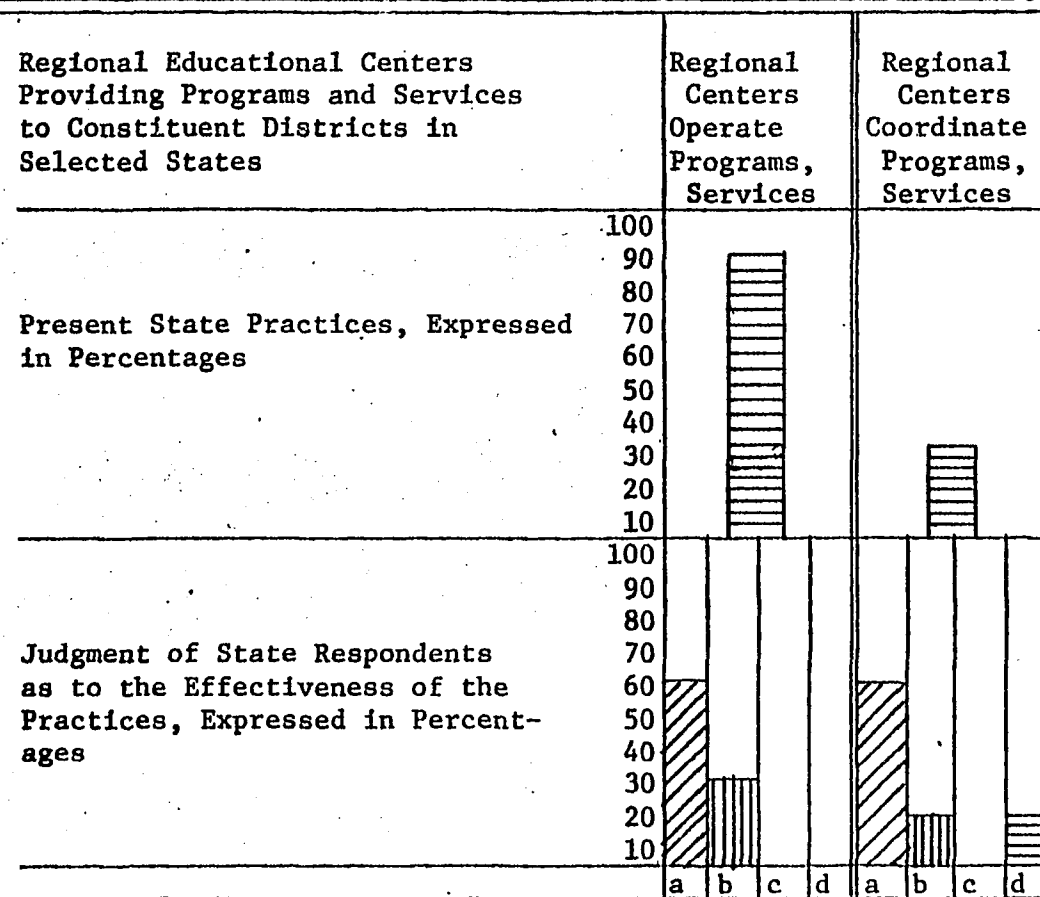
Figure 18 portrays the practices relating to Regional Educational Centers providing programs and services to constituent districts. Each category is based on 100% as some respondents marked in each category. Twenty-eight respondents (91%) indicated that the regional units in their state actually operated certain programs. This practice was judged to be satisfactory or to work fairly well. Ten respondents (32%) indicated that the regional units in their state only coordinated programs and services and left the actual operation to the local districts. This practice was judged to be satisfactory or to work fairly well.

#### Financing of Regional Educational Centers

Figure 19 portrays the practices relating to adoption of the budget of Regional Educational Centers. Twenty-six respondents (84%) of the possible 31 respondents indicated that the regional unit's governing body was able to determine its own budget. Thirteen respondents (50%) indicated that the budget was subject to review by another authority and judged this practice to be satisfactory or to work fairly well. Six (27%) of the 26 respondents of this group said the budget was subject to review by another authority and judged this practice to be satisfactory. Four respondents (15%) indicated other practices regulating the budget-making and adoption process and specified the following: (1) the budget is subject to a public hearing, but the governing body of the regional unit makes the final determination, (2) we have a budget committee composed of seven members from the governing board and seven additional members, (3) approved at the annual delegate

FIGURE 18

PRACTICES RELATING TO REGIONAL EDUCATIONAL CENTERS PROVIDING PROGRAMS AND SERVICES TO CONSTITUENT DISTRICTS IN SELECTED STATES, AND JUDGMENTS OF STATE RESPONDENTS AS TO THE EFFECTIVENESS OF THESE PRACTICES, EXPRESSED IN PERCENTAGES

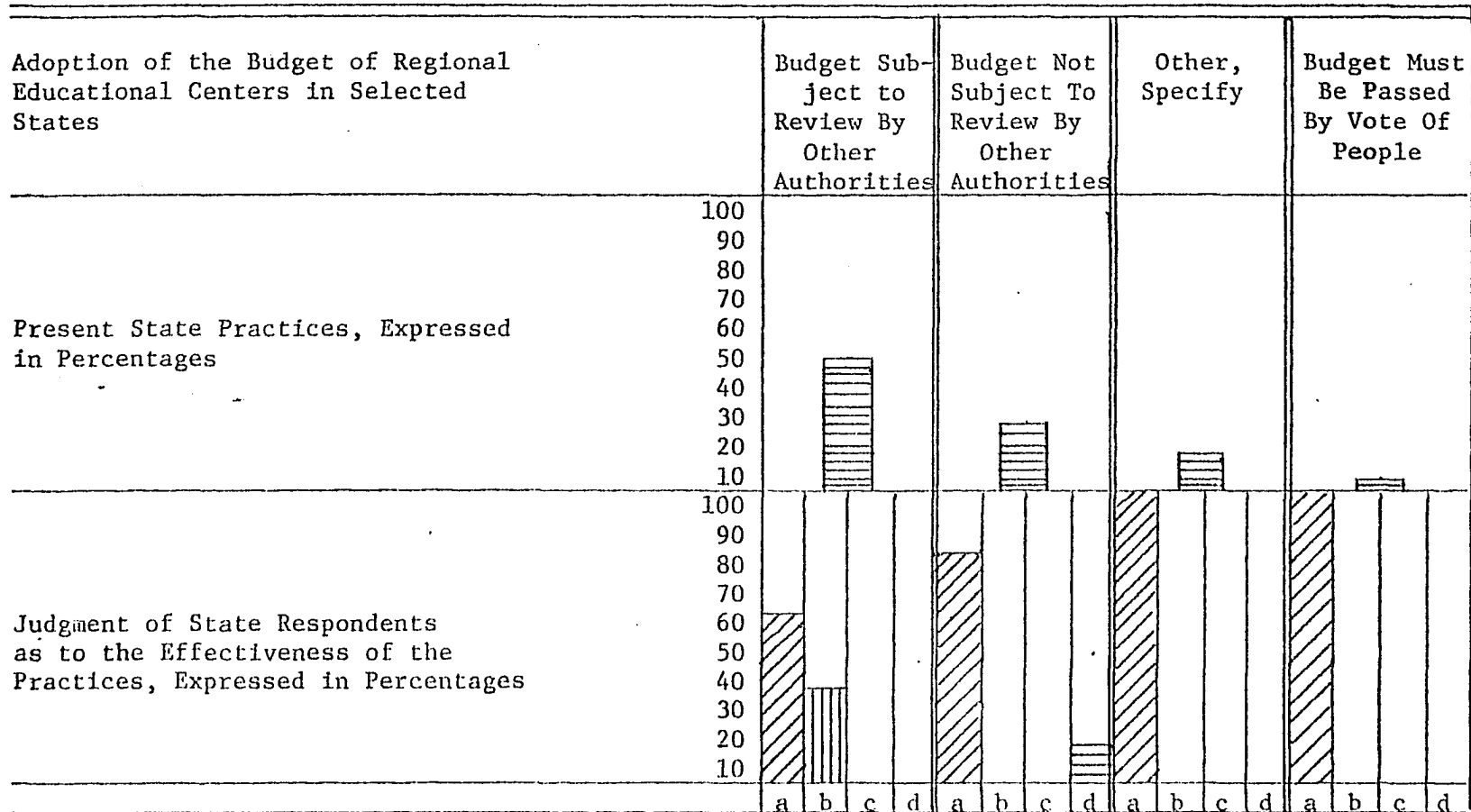


a - Satisfactory, no change anticipated  
b - Works fairly well, no change contemplated

c - Unsatisfactory, change planned/needed  
d - Did not make judgment

FIGURE 19

PRACTICES RELATING TO ADOPTION OF THE BUDGET OF REGIONAL EDUCATIONAL CENTERS IN SELECTED STATES,  
AND JUDGMENTS OF STATE RESPONDENTS AS TO THE EFFECTIVENESS OF THESE PRACTICES,  
EXPRESSED IN PERCENTAGES



a - Satisfactory, no change anticipated  
b - Works fairly well, no change contemplated

c - Unsatisfactory, change planned/needed  
d - Did not make judgment

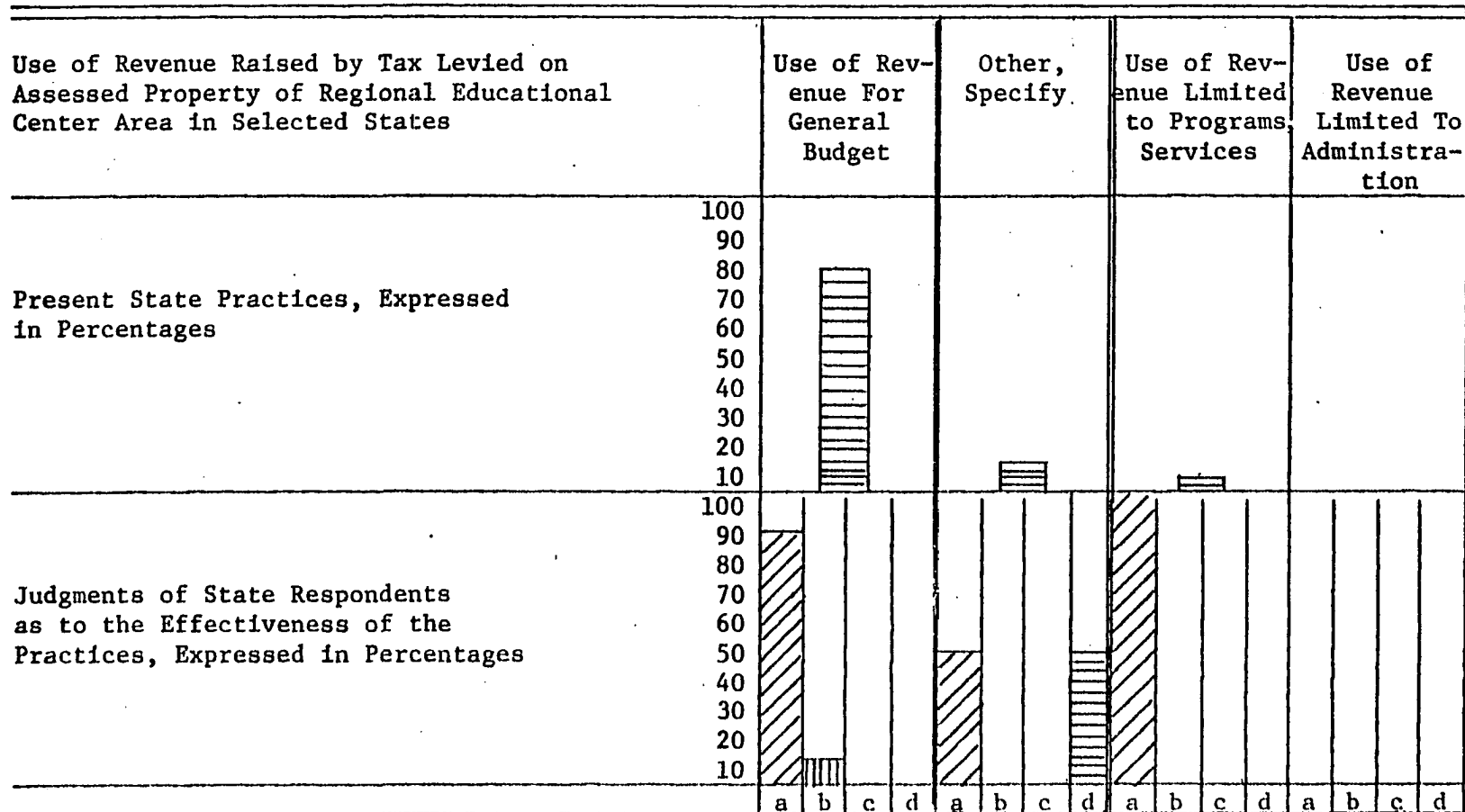
assembly meeting, and (4) administrative budget is not subject to review but the budget for services may be reviewed. All of the respondents in this group judged their practice to be satisfactory. One respondent (4%) indicated that the budget must be passed by a vote of the people and judged this practice to work fairly well.

Figure 20 portrays the practices relating to the use of revenue raised by tax levy on assessed property of Regional Educational Center. Fourteen respondents (45%) indicated that the regional units in their state were authorized to levy taxes. Ten respondents (80%) indicated that the revenue from taxes could be used to support the general budget of the regional unit. This practice was judged to be satisfactory or to work fairly well. Two respondents (13%) indicated other practices and specified the following: (1) certain levies are earmarked--such as special education, vocational education, etc., and (2) electors vote taxes for specific purposes. The respondents in this group judged their practice to be satisfactory. One respondent (7%) indicated that the revenue raised from a tax levy was limited to use for expenditures for programs and services of the regional unit and judged this practice to be satisfactory.

Figure 21 portrays the practices relating to bonded indebtedness of Regional Educational Centers. Three respondents (13%) indicated that the regional unit's governing body had the authority to incur bonded indebtedness. The respondents judged this practice to be satisfactory. One respondent who indicated that their governing board could not incur bonded indebtedness made the statement that they wished they could. All of these respondents (100%) said their bonded indebtedness was limited.

FIGURE 20

PRACTICES RELATING TO THE USE OF REVENUE RAISED BY TAX LEVIED ON ASSESSED PROPERTY OF THE EDUCATIONAL CENTER AREA IN SELECTED STATES, AND JUDGMENTS OF STATE RESPONDENTS AS TO THE EFFECTIVENESS OF THESE PRACTICES, EXPRESSED IN PERCENTAGES

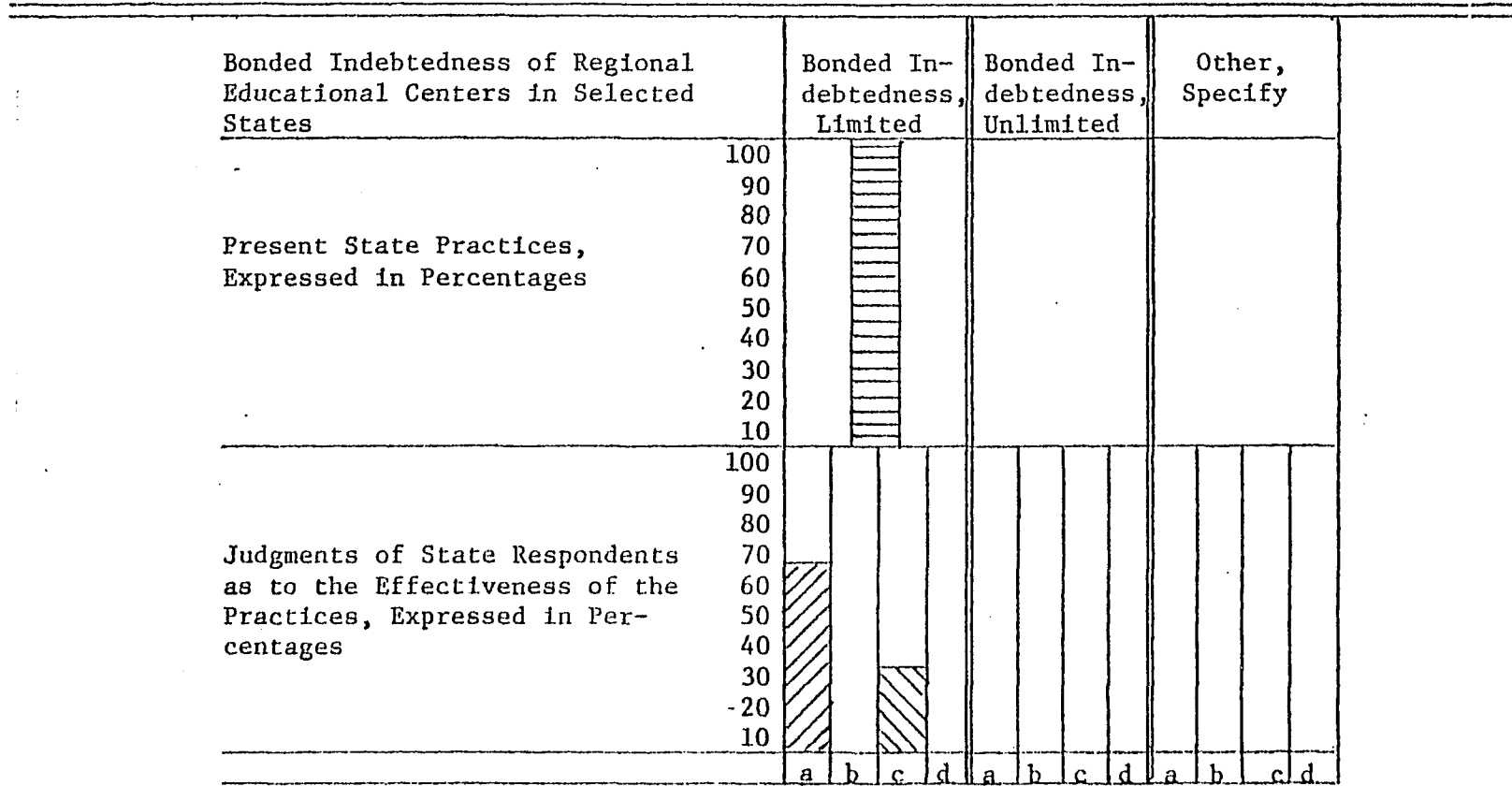


a - Satisfactory, no change anticipated  
b - Works fairly well, no change contemplated

c - Unsatisfactory, change planned/needed  
d - Did not make judgment

FIGURE 21

PRACTICES RELATING TO BONDED INDEBTEDNESS OF REGIONAL EDUCATIONAL CENTERS IN SELECTED STATES,  
AND JUDGMENTS OF STATE RESPONDENTS AS TO THE EFFECTIVENESS OF THESE PRACTICES,  
EXPRESSED IN PERCENTAGES



- a - Satisfactory, no change anticipated      c - Unsatisfactory, change planned/needed  
b - Works fairly well, no change contemplated      d - Did not make judgment

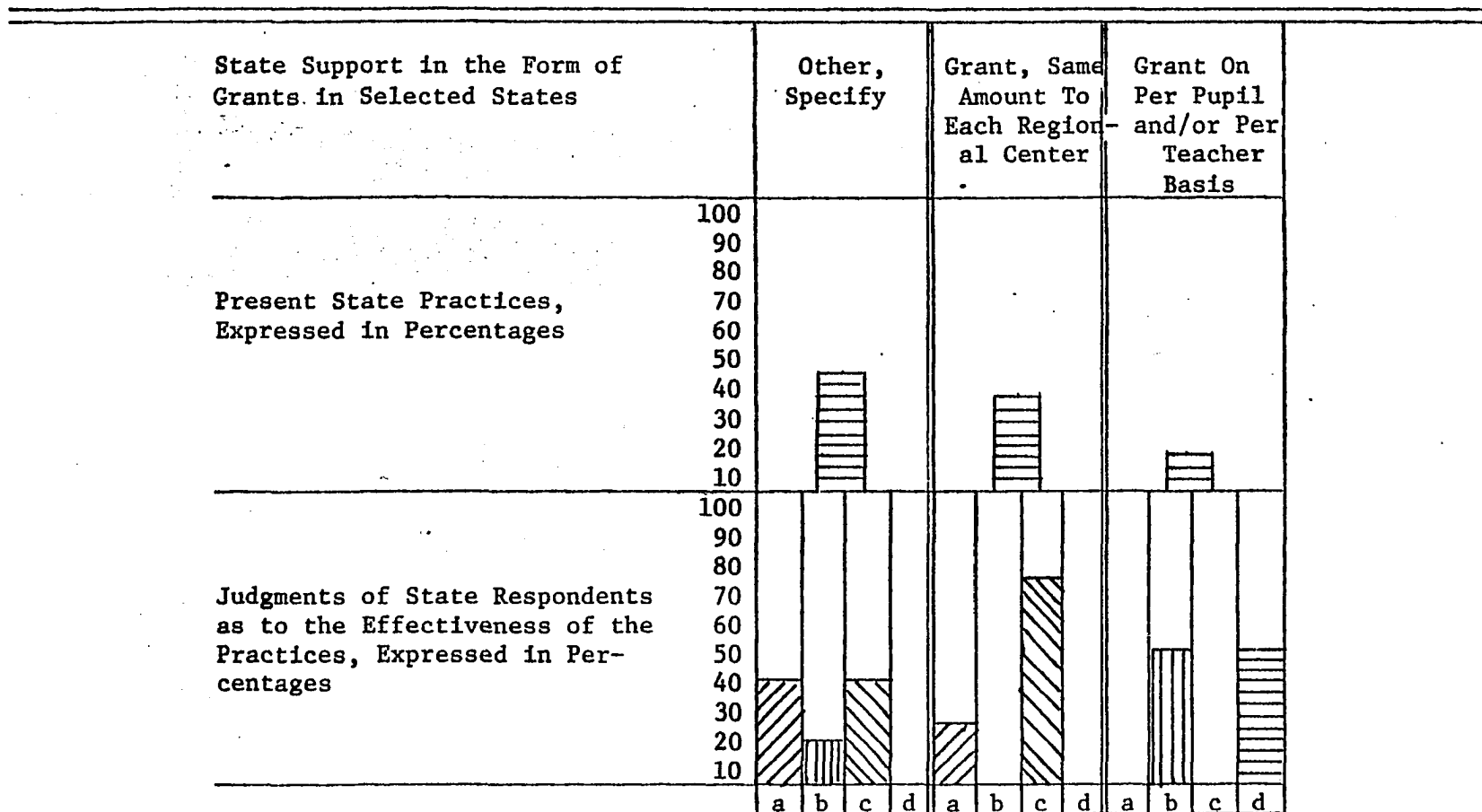


Figure 22 portrays the practices relating to state support in the form of grants to Regional Educational Centers. Eleven respondents (34%) indicated that each regional unit in their state received a basic flat grant from the state. Five respondents (45%) indicated other practices and specified the following: (1) a complicated formula and judged this practice to be unsatisfactory with a change needed to allow recognition to all districts, (2) money distributed based on projected objectives to be achieved with no change planned, and (3) now receiving \$29,000 with legislation introduced to raise this by about five percent. Four respondents (36%) of this group indicated that the grant is the same to each regional unit. This practice was judged satisfactory by one of the respondents and unsatisfactory by two of the respondents. However, the two respondents that judged this practice unsatisfactory did not specify the changes planned or needed. Two respondents (19%) indicated that the basic flat grant was distributed on a per pupil and/or per teacher basis. This practice was judged to work fairly well.

Figure 23 portrays the practices relating to state support that is based on an equalization and/or incentive program. Nine respondents (30%) indicated that regional units in their states received support through an equalization and/or incentive program. Seven of these respondents (78%) said that this support was an integral part of the local-state program for support of public schools. All but one of the respondents in this group judged this practice to be satisfactory or to work fairly well. The respondent who judged this practice to be unsatisfactory said that the present formula did not provide for increased

FIGURE 22

PRACTICES RELATING TO STATE SUPPORT IN THE FORM OF GRANTS TO REGIONAL EDUCATIONAL CENTERS  
IN SELECTED STATES, AND JUDGMENTS OF STATE RESPONDENTS AS TO THE EFFECTIVENESS  
OF THESE PRACTICES, EXPRESSED IN PERCENTAGES

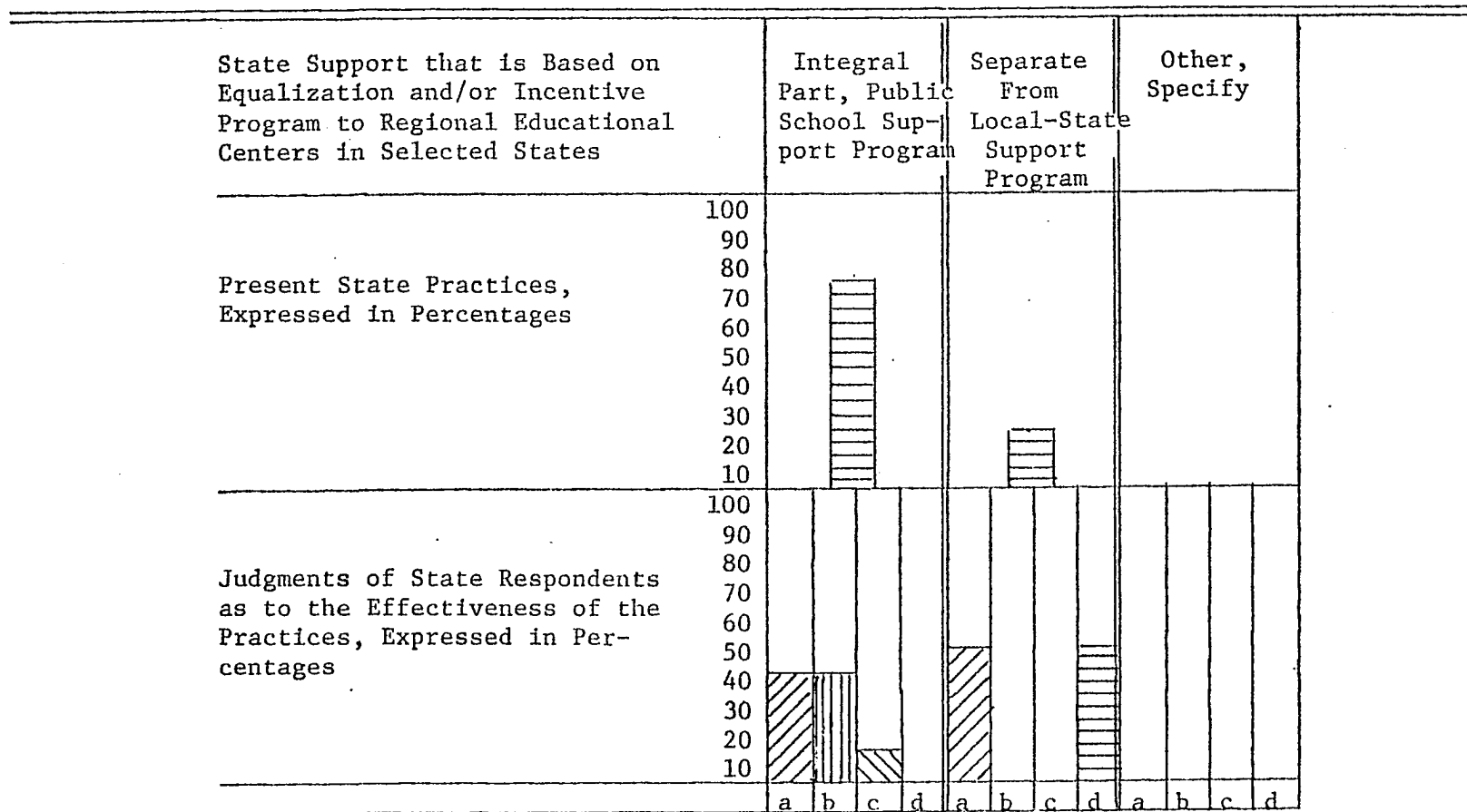


a - Satisfactory, no change anticipated  
b - Works fairly well, no change contemplated

c - Unsatisfactory, change planned/needed  
d - Did not make judgment

FIGURE 23

PRACTICES RELATING TO STATE SUPPORT THAT IS BASED ON EQUALIZATION AND/OR INCENTIVE PROGRAM  
TO REGIONAL EDUCATIONAL CENTERS IN SELECTED STATES, AND JUDGMENTS OF STATE RESPONDENTS  
AS TO THE EFFECTIVENESS OF THESE PRACTICES EXPRESSED IN PERCENTAGES



a - Satisfactory, no change anticipated  
b - Works fairly well, no change contemplated

c - Unsatisfactory, change planned/needed  
d - Did not make judgment

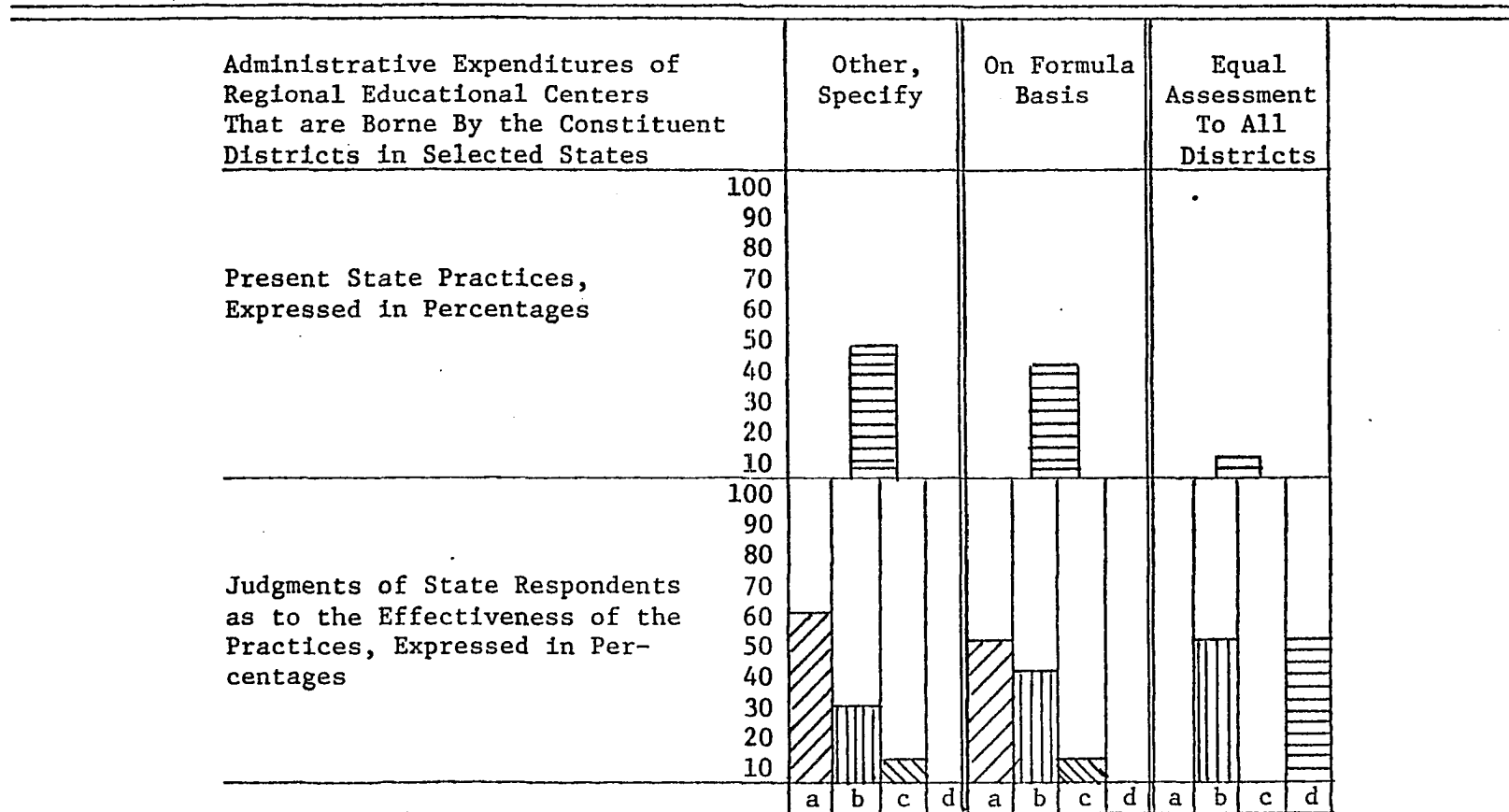
demands of recent years. Two respondents (22%) indicated that the support through equalization and/or incentive program was separate from the local-state public school support program, but had equalization and/or incentive features. This practice was judged to be satisfactory.

Figure 24 portrays the practices relating to administrative expenditures of Regional Educational Centers that are borne by constituent districts. Ten of the respondents (47%) indicated other practices for securing the funds from the local districts to meet the administrative expenses of the regional units, and specified the following: (1) county or unit-wide one mill levy, (2) Title III ESEA, (3) combination of tax levy and state aid, (4) equal levy on all assessed valuation in the area, and (5) by contract. All but one of the respondents in this group judged their practice to be satisfactory or to work fairly well. The respondent who judged his practice unsatisfactory did not list the change planned or needed. Nine respondents (43%) indicated that the administrative expenditures were met in all or part by local districts on a formula basis. All but one of the respondents in this group judged this practice to be satisfactory or to work fairly well. The respondent who judged this practice unsatisfactory did not list the change needed or planned. Two respondents (14%) indicated that the administrative expenditures were met in all or part by equal assessment to all districts and they judged this practice to work fairly well.

Figure 25 portrays the practices relating to the assessment of costs for programs and services among the constituent districts. Sixteen respondents (60%) indicated other practices than those listed on the questionnaire and specified the following: (1) unit-wide one mill

FIGURE 24

PRACTICES RELATING TO ADMINISTRATIVE EXPENDITURES OF REGIONAL EDUCATIONAL CENTERS THAT ARE BORNE BY CONSTITUENT DISTRICTS IN SELECTED STATES, AND JUDGMENTS OF STATE RESPONDENTS AS TO THE EFFECTIVENESS OF THESE PRACTICES, EXPRESSED IN PERCENTAGES

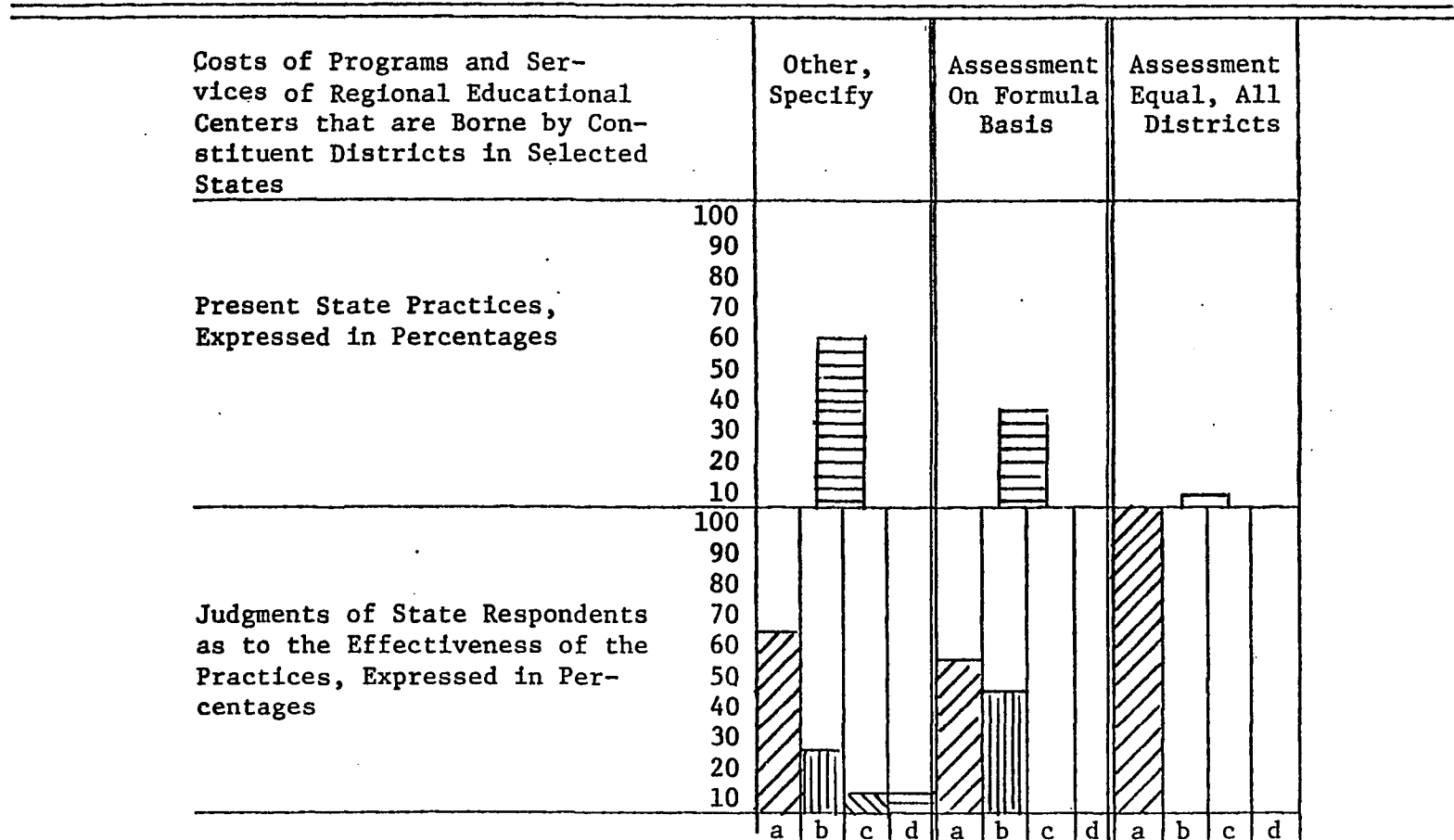


a - Satisfactory, no change anticipated  
b - Works fairly well, no change contemplated

c - Unsatisfactory, change planned/needed  
d - Did not make judgment

FIGURE 25

PRACTICES RELATING TO THE ASSESSMENT OF COSTS FOR PROGRAMS AND SERVICES AMONG THE CONSTITUENT DISTRICTS IN REGIONAL EDUCATIONAL CENTERS IN SELECTED STATES, AND JUDGMENTS OF STATE RESPONDENTS AS TO THE EFFECTIVENESS OF THESE PRACTICES, EXPRESSED IN PERCENTAGES



a - Satisfactory, no change anticipated  
b - Works fairly well, no change contemplated

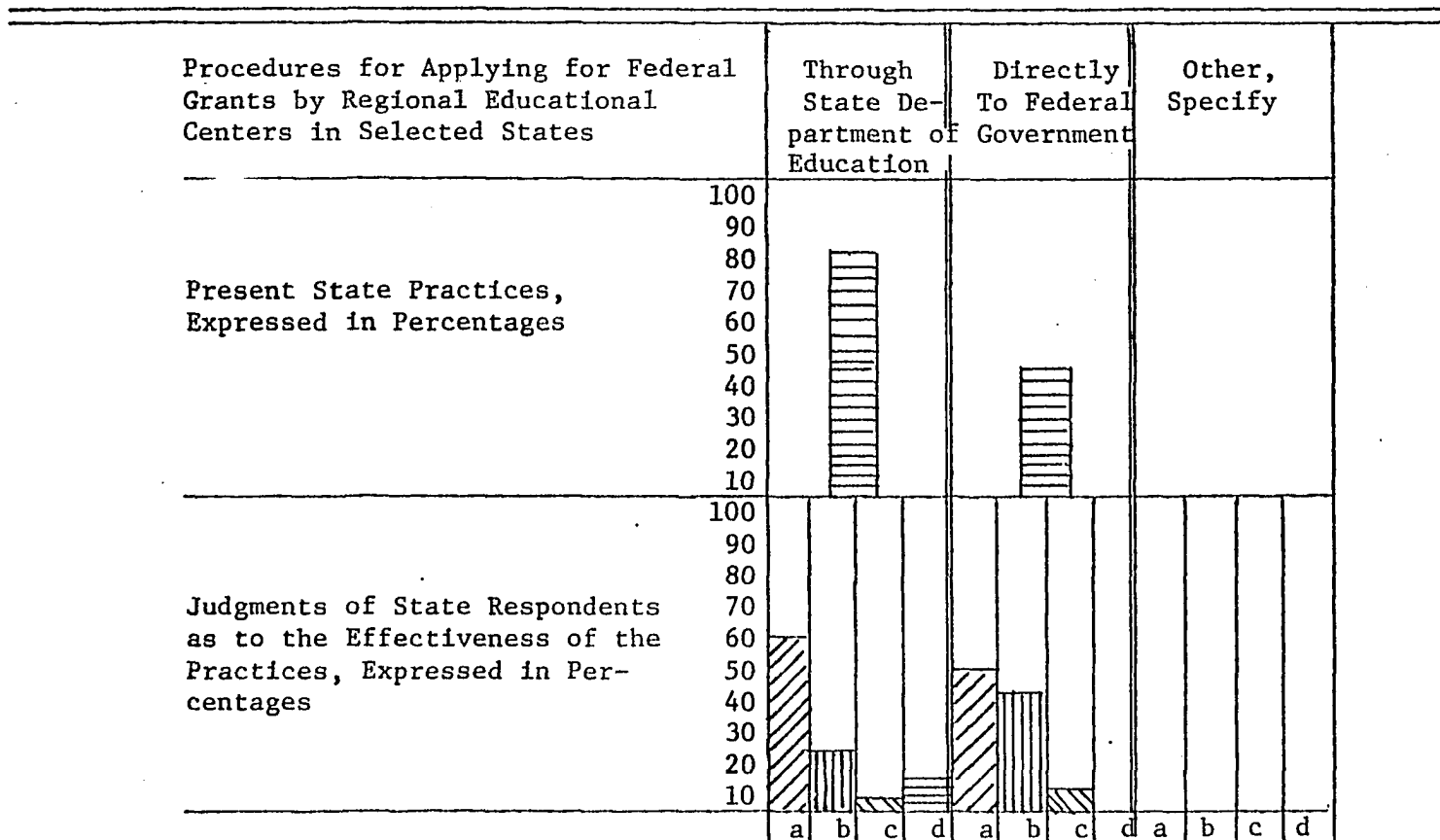
c - Unsatisfactory, change planned/needed  
d - Did not make judgment

levy on all tangible property, (2) varies with units, (3) tax levy, (4) combination of equal assessment and assessment formula based on programs and services used plus Title III ESEA, (5) various ways, (6) tax levy and state aid, (7) direct property tax, (8) some services at no cost and other services on partial fee basis, and (9) private foundation. All but one of the respondents specifying other practices judged their practice to be satisfactory or to work fairly well. The respondent who judged their practice unsatisfactory did not specify the change planned or needed. Nine respondents (36%) indicated that expenditures by the regional unit for programs and services are met by an assessment formula based on programs and services provided. This practice was judged to be satisfactory or to work fairly well. One respondent (4%) indicated that the expenditures of the regional unit for services and programs are met by equal assessment to all constituent districts and judged this practice to be satisfactory.

Figure 26 portrays the practices relating to procedures for applying for Federal Grants. Twenty-five respondents (84%) indicated that the regional units in their state applied for federal grants through the state department of education. All but one of the respondents in this group judged this practice to be satisfactory or to work fairly well. However, the respondent who judged this practice unsatisfactory did not specify the change planned or needed. Fourteen respondents (45%) indicated that their regional units could apply directly to the federal government for federal grants. All but one of the respondents in this group judged this practice to be satisfactory or to work fairly well. The respondent who judged this practice unsatisfactory did not specify the change planned or needed.

FIGURE 26

PRACTICES RELATING TO PROCEDURES FOR APPLYING FOR FEDERAL GRANTS BY REGIONAL EDUCATIONAL CENTERS IN SELECTED STATES AND JUDGMENTS OF STATE RESPONDENTS AS TO THE EFFECTIVENESS OF THESE PRACTICES, EXPRESSED IN PERCENTAGES



a - Satisfactory, no change anticipated  
b - Works fairly well, no change contemplated

c - Unsatisfactory, change planned/needed  
d - Did not make judgment



Conclusion

This survey indicates that a wide variety of practices and procedures exist in Regional Intermediate Educational Practices across the United States. This suggests that Regional Intermediate Educational Centers are still in the developmental stage and that further refinement of practices and procedures is to be expected as a result of experiences and research.

## CHAPTER V

### CRITERIA FOR REGIONAL INTERMEDIATE EDUCATIONAL CENTERS FOR OKLAHOMA

A major purpose of this study was to develop a statewide plan for a network of Regional Intermediate Educational Centers for Oklahoma. This statewide plan was to be based upon validated criteria for Regional Intermediate Educational Centers. This chapter describes how these criteria were developed and validated.

A list of fourteen criteria was developed from: (1) the literature relating to the regional intermediate unit in the United States, (2) the state plans of states presently operating regional units, and (3) from the information obtained from the responses to the questionnaires sent to state coordinators of the states that have regional intermediate units and selected executive directors of regional units in these states. The literature relating to regional intermediate units was reviewed in Chapter II. The state plans of the states presently operating regional intermediate units was reviewed in Chapter III. The information from the questionnaire responses was reviewed in Chapter IV.

A panel of eight regional intermediate unit and general administration authorities was selected to evaluate the criteria. This panel was drawn from various educational and governmental organizations which were representative of several geographic regions in the United States. The panel members were: M. L. Brockette, Assistant Commissioner for

Regional Education Services, Texas Education Agency; Roy Brubacher, Consultant, Boards of Cooperative Services, State Department of Education, State of Colorado; William Emerson, Superintendent, Oakland Schools, Pontiac, Michigan; Robert M. Isenberg, Associate Executive Director of the Department of Rural Education of the National Education Association; William P. McLure, Director, Bureau of Educational Research, College of Education, University of Illinois; Helmer Sorenson, Dean, College of Education, Oklahoma State University; Robert Stephens, Iowa Center for Research in School Administration, College of Education, University of Iowa; Charles H. Wileman, Program Administrator, Cooperative Educational Service Agencies, Wisconsin Department of Public Instruction.

The criteria were then submitted to the panel of authorities. Panel members were asked to either agree, agree with reservations, or disagree with the criteria as presented and comment as necessary to express their views. Criteria were developed, taking into consideration the suggestions from the panel members.

The original criteria are listed below. Following the statement of each criterion in its original form is the name of each authority with his judgment of the criterion along with his comments. The responses of the authorities have been, in a few cases, slightly edited to facilitate reporting. The writer carefully weighed the opinions of the panel of authorities on each criterion and made such revisions as seemed appropriate. The revised statement of each criterion, if revisions were made, is given following the reports of the responses from panel members.

General Criterion One

Regional Intermediate Educational Centers should exist to promote adequate and comprehensive educational opportunity within their area by: (1) providing essential leadership, (2) providing educational programs and services, essential for a comprehensive program of education, to local districts which they are unable to provide effectively and economically for themselves, and (3) performing liaison functions between the State Department of Education and the local districts.

All of the authorities agreed, or agreed with reservations, with this criterion.

Brockette--Agreed with reservations with comments as follows:

The regional education centers should function as service institutions as contrasted to intermediate units for administration. Emphasis should be placed on their local school district orientation. They should be educational components which are capable of providing some services as effectively to the largest school district in the region as they perform certain other services to the smallest school district.

Brubacher--Agreed without comment

Emerson--Agreed with reservations with comments as follows:

The centers should do only four kinds of things and do them at a very high level. They should allow the constituency to have access to high levels of clinical practice in speech and hearing, reading, psychology, and vocational rehabilitation. People having doctors degrees should head these programs.

Isenberg--Agreed with comments as follows:

The only justification for any type of educational organization is the extent it makes educational opportunities and programs available. This is a basic state responsibility but the state legislature or state education agency cannot administer a statewide educational program and at the same time keep a degree of local involvement. Delegating operational functions to local education agencies has been the traditional approach to program development and this is likely to continue. The probability that educational programs will continue also to become more highly specialized and sophisticated is also great. Whether these programs require either a large population base for effective operation, highly specialized and expensive personnel or equipment, or other resources in short supply, a regional approach is essential.

McLure--Agreed with reservations with comments as follows:

My reservation refers to local districts that have insufficient school population to perform services economically and feasibly to all pupils.

Sorenson--Agreed with reservations with comments as follows:

This is one way to assist in getting the job done.

Stephens--Agreed with comments as follows:

Assumption is made that coordination is inferred in items 1 and 3. I would also propose the addition of the term "equal" educational opportunities for all children (both dimensions of the term).

Wileman--Did not make a judgment on this criterion.

This criterion was revised to read as follows:

General Criterion One (revised): Regional Intermediate Educational Centers should exist to promote adequate and comprehensive educational opportunity within their area by: (1) providing essential leadership on a regional basis, (2) providing coordination among the local districts, (3) providing educational programs and services, essential for a comprehensive program of education, to local districts which they are unable to provide effectively and economically for themselves, and (4) performing liaison functions between the State Department of Education and the local districts.

#### General Criterion Two

Regional Intermediate Educational Centers should be local education agencies and be an integral part of the State Education System but yet not an arm of the State Department of Education.

All of the authorities agreed, or agreed with reservations, with this criterion.

Brockette--Agreed without comment.

Brubacher--Agreed without comment.

Emerson--Agreed with comments as follows:

The region should have access to academic consultants in the academic specialties, staffed by people having doctors degrees in such specialty.

Isenberg--Agreed with comments as follows:

When an intermediate education agency is considered a local education agency, it is usually eligible for direct funding from the state and federal levels. This is why it is also essential that the intermediate agency be an integral component of the state school system. There are exceptions which have been able to develop significant regional programs--independent cooperatives, school study councils, etc.

McLure--Agreed without comment.

Sorenson--Agreed with reservations with comments as follows:

Probably a distinction which is more fancied than real. Isn't, in fact, each local school district a part of the state system and couldn't, therefore, we argue that it is "an arm, etc.," . . .

Stephens--Agreed without comment.

Wileman--Agreed without comment.

This criterion was not changed.

### General Criterion Three

All public school districts in the state should be a member of a Regional Intermediate Educational Center. The right of withdrawal from one Center should be only to join another Center.

All of the authorities agreed, or agreed with reservations, with this criterion.

Brockette--Agreed with reservations with comments as follows:

All districts should be considered as members of a regional education institution. Participation in services provided should be optional.

Brubacher--Agreed with reservations with comments as follows:

Only if there is some state support for administration of the Intermediate Center.

Emerson--Agreed with comments as follows:

The center should provide constituents access to professional reference library and media center.

Isenberg--Agreed with reservations with comments as follows:

It is desirable to have all territory in a state a part of an intermediate education agency. There are questions which arise with respect to our largest cities and admittedly some special problems need to be considered. With very few exceptions, most cities can be accommodated.

Local education agencies should be able to choose whether or not they will participate in a particular program. This right should be preserved. Provisions should also be made for cooperation between intermediate agencies. At no time, however, should any local education agency be able to withdraw from one intermediate to join another. This kind of transfer should be done in terms of state level decision making.

McLure--Agreed without comment.

Sorenson--Agreed with comments as follows:

If such centers are established, each school district should belong to some center.

Stephens--Agreed with reservations with comments as follows:

Delete the last sentence. It is not essential if adequate/optional regions are created initially and if points proposed in criterion 7 and 11 receive consideration.

Wileman--Agreed without comment.

This criterion was revised to read as follows:

General Criterion Three (revised): All public school districts in the state should be a member of a Regional Intermediate Educational Center. Member districts have the right to choose whether or not they will participate in a particular program and/or service. Member districts may not withdraw from a regional unit and may transfer affiliation only upon approval of the State Department of Education.

#### General Criterion Four

The state laws, establishing Regional Intermediate Educational Centers, should define clearly the organization, functions, and financing of the Centers, but should be sufficiently flexible to allow adaptation to changing educational conditions and needs.

All of the authorities agreed, or agreed with reservations, with this criterion.

Brockette--Agreed with reservations with comments as follows:

The state law creating the centers should be broad leaving authority and responsibility to the State Board and the Chief State School Officer to develop regulations that govern the operation.

Brubacher--Agreed with reservations with comments as follows:

Change the word "functions" to "powers and duties."

Emerson--Agreed with comments as follows:

The constituency of the Center should have access to high levels of technology to include computer hardware only for management, research and vocational education purposes, but not for CAI; and to a series of consultants of a technological kind, such as a CPA, a systems engineer, operations analyst, etc.

Isenberg--Agreed with reservations with comments as follows:

Individual intermediate education agencies should have a great deal of flexibility in program development. The specific programs they undertake and develop should be based on the desires and counsel of local districts in their regional area. If functions for these agencies are to be defined in law, they should be sufficiently broad that priorities and options are possible.

McLure--Agreed without comment.

Sorenson--Agreed with comments as follows:

Such a generalization is acceptable.

Stephens--Agreed with comments as follows:

. . . and flexible to differing geographic and demographic regions of the state (may be inferred in your statement) as this applies to statutory prescribed functions.

Wileman--Agreed without comment.

This criterion was revised to read as follows:

General Criterion Four (revised): The State Laws, establishing Regional Intermediate Educational Centers, should define clearly the organization, powers and duties, and financing of the Centers. However, the laws should be sufficiently broad and flexible to allow adaptation to changing educational conditions and needs and to allow individual Intermediate Regional Educational Centers the freedom to develop programs and services based on the desire and needs of their area.



General Criterion Five

The basic responsibility of Regional Intermediate Educational Centers should be to local school districts with some responsibility to the State Department of Education.

Seven of the authorities either agreed or agreed with reservations with this criterion and one authority did not make an evaluation.

Brockette--Agreed without comment.

Brubacher--Agreed without comment.

Emerson--Agreed without comment.

Isenberg--Agreed with comments as follows:

State law should delegate functions which must be performed within the state school system. Some functions will be delegated to the state education agency, some to local districts and some to intermediate units. None of these agencies should be performing the same functions. Those operations which each level does perform, however, should be in harmony with and supportive of those performed by the other levels. This means that an intermediate agency's service program should be responsive to the functions of both the state and local levels but directly responsible only to its own governing board and state law.

McLure--Agreed without comment.

Sorenson--Did not make an evaluation but commented as follows:

It is difficult to differentiate--responsibilities differ in kind but how can one say one is more basic than others?

Stephens--Agreed with comments as follows:

Responsibility to the state education agency relates primarily to management and coordination functions required for the efficient operation of the state school system.

Wileman--Agreed without comment.

This criterion remained as originally stated.

General Criterion Six

The organizational and operational structure of the Regional Intermediate Educational Centers should allow for cooperation and sharing of services between regional centers and: (1) the local districts,

(2) other regional centers, (3) the State Department of Education, and (4) other agencies.

Seven of the eight authorities agreed with this criterion and one authority disagreed.

Brockette--Agreed without comment.

Brubacher--Agreed without comment.

Emerson--Agreed without comment.

Isenberg--Agreed with comments as follows:

Cooperation and the coordination and development of regional programs are the major reasons why an intermediate educational district is needed.

McLure--Agreed without comment.

Sorenson--Disagreed with comments as follows:

I'm not sure I agree with this statement as it now stands--I agree with what I believe you are striving to state. This raises questions such as: What is the relationship between (1) regional centers and constituent districts? (2) regional centers and other school districts? (3) regional centers and the state department of education? and (4) regional centers and other regional centers?

Stephens--Agreed with comments as follows:

Expand (4)--spell out other educational institutions in both public and private sectors (particularly institutions of higher education and public and private health, welfare, and social agencies--would require enabling legislation) further, language of criterion should be such that cooperative efforts are to be encouraged.

Wileman--Agreed without comment.

This criterion was revised to read as follows:

General Criterion Six (revised): The organization and operational structure of the Regional Intermediate Educational Centers should allow for and encourage cooperation and sharing of services between regional centers and: (1) the local districts, (2) other regional centers, (3) the State Department of Education, (4) area community colleges and area vocational-technical schools, (5) other educational agencies, public and private, (6) health, welfare, and social agencies, and (7) other local, regional, and state governmental agencies.

General Criterion Seven

The control of the Intermediate Regional Educational Center should be in an elected lay board of education. The board should be representative of the people of the area served.

Six of the authorities either agreed or agreed with reservations with this criterion, and two authorities disagreed.

Brockette--Agreed without comment.

Brubacher--Disagreed with comments as follows:

To insure good communications the Board of Directors should be composed of members of local boards of education.

Emerson--Agreed with reservations with comments as follows:

Properly constituted, centers should have, wherever possible, a student population of 100,000 or more. Most states should not have over 10 or 15 regional centers. I think the lay board of education ought to be appointed by the Governor for six overlapping terms.

Isenberg--Agreed with comments as follows:

This is in terms of good democratic principle of organization--an elected lay board of education responsible for the appointment of a professional administrator. This type of organizational arrangement has been effective in this country at state, intermediate, and local levels for many years.

While a representative lay board is considered very important, there are a number of options as to how this board might be elected. A representative election (by the members of local district boards, for example), is proving more effective in some instances than direct election by all people in the area. There are some problems when large cities and rural areas are combined in the same unit.

McLure--Disagreed with comments as follows:

I think such a board creates unnecessary difficulty in government of education. I prefer a small Board or Council composed of representatives from local boards to implement basic policies agreed upon by constituent local boards.

Sorenson--Agreed without comment.

Stephens--Agreed with reservations with comments as follows:

I tend to lean toward election of the board by the constituent local school district boards vs. general election method--other position

influenced in part by concern over the full implementation of one man-one vote concept; it is also related to a desire to have local school districts exercise some financial control over the budget of a regional service unit.

Wileman--Agreed with reservations with comments as follows:

I would suggest some interlocking structure with local school district board members.

This criterion was revised to read as follows:

General Criterion Seven (revised): The control of the Regional Intermediate Educational Center should be in an elected lay board of education. The governing board should be elected by the constituent local school district boards.

#### General Criterion Eight

The governing board should be composed of seven members with staggered terms.

Six of the authorities either agreed or agreed with reservations with this criterion and two authorities disagreed.

Brockette--Agreed without comment.

Brubacher--Disagreed with comments as follows:

Have one representative from each participating local board of education.

Emerson--Agreed without comments.

Isenberg--Agreed with comments as follows:

Seven board members is a good number. Boards are also effective with five and nine members. A number of options have proven desirable and workable.

McLure--Disagreed with comments as follows:

Five to seven members chosen from local board would be ample to implement special programs and services in the intermediate region.

Sorenson--Agreed with comments as follows:

This certainly would be a governing board which could be conceived as acceptable (not the only way).

Stephens--Agreed with reservations with comments as follows:

The number of board members is dependent upon geographic and other size characteristics of the regional unit. If large geographic regions are established and/or a large number of local districts are included, I would then favor expanding the number to perhaps 11 or 13. What this says, in effect, is that the number of members on the governing board might well vary from 7-11 or 7-13, dependent upon factors previously identified.

Wileman--Agreed without comment.

This criterion was revised to read as follows:

General Criterion Eight (revised): The governing board should be composed of 7-11 members with staggered terms.

#### General Criterion Nine

The governing board should have the power to develop its own policies, rules, and regulations in keeping with statutory enactments, provisions of the state constitution, and such rules and regulations that may be established by the State Educational Agency.

Seven of the authorities agreed with this criterion and one authority disagreed.

Brockette--Agreed without comment.

Brubacher--Agreed without comment.

Emerson--Agreed without comment.

Isenberg--Agreed with comments as follows:

These are the appropriate functions of any effective governing board.

McLure--Disagreed with comments as follows:

These policies should be developed by local boards. If they can't do it, something is so fundamentally weak that an intermediate board would be inept.

Sorenson--Agreed with comments as follows:

This is legal and sound.

Stephens--Agreed with comments as follows:

This is consistent with the concept of local district administration.

Wileman--Agreed without comment.

This criterion was not changed.

General Criterion Ten

The powers of the governing board should include the authority to:

- A. Adopt policy
- B. Appoint the chief administrator and fix his salary
- C. Appoint the necessary staff members upon the recommendation of the chief administrator.
- D. Determine its own budget within revenue limitations.
- E. Establish the physical location of the center.

Seven of the authorities either agreed or agreed with reservations with this criterion and one authority disagreed.

Brockette--Agreed without comment.

Brubacher--Agreed without comment.

Emerson--Agreed without comment.

Isenberg--Agreed with comments as follows:

The functions outlined are desirable. In some instances (Michigan, for example), the board determine its own budget and has tax levying authority but is also required to get budget review and approval from the boards of local school districts. While this may seem to impose a substantial check on the authority of the intermediate board (which indeed it does), it is considered by many as a desirable requirement.

McLure--Disagreed with comments as follows:

Again these powers should be vested in local boards. If there are too many local districts, consolidate them. If state legislatures and departments of education continue to avoid the fundamental issue of reorganizing local districts into viable and effective (and just plain common sense) units, then I agree with all of your criteria. In that case, create the strongest possible intermediate boards and hope that the intermediate region will in time become the local school district, with an atrophying of present local boards.

Sorenson--Agreed without comment.

Stephens--Agreed with reservations with comments as follows:

(E) Subject to approval of state education agency. Further, initiation of programs--subject to approval of local advisory groups and state education agency.

Wileman--Agreed without comment.

This criterion was revised to read as follows:

General Criterion Ten (revised): The powers of the governing board should include authority to:

- A. Adopt policy
- B. Appoint the chief administrator and fix his salary
- C. Appoint the necessary staff members upon the recommendation of the chief administrator
- D. Determine its own budget within revenue limitations
- E. Establish the physical location of the center, subject to approval of the State Education Agency
- F. Initiate programs and services subject to approval of local advisory groups and the State Education Agency

#### General Criterion Eleven

There should be an Advisory Board, made up of one member of the professional staff and one member of the governing board of each constituent district, to advise and counsel the administrative personnel of the Intermediate Regional Educational Center on all aspects of the operation of the unit.

Six of the authorities agreed or agreed with reservations with this criterion and two authorities disagreed.

Brockette--Disagreed with comments as follows:

A committee of this size can be too large to operate effectively. Other ways should be explored to give the use of the services an effective method of shaping policy and influencing decision making.

Brubacher--Agreed with reservations with comments as follows:

If the Board of Directors of the Intermediate Center is composed of members of local boards of education they need not be part of the advisory board.

Emerson--Agreed without comment.

Isenberg--Agreed with reservations with comments as follows:

An advisory board for an intermediate education agency is considered to be most desirable. It has been the general experience that an

advisory board made up of the chief administrators of local districts is more effective than a larger advisory board involving both professionals and board members. When the chief school administrators meet regularly with the intermediate administrator they can plan, determine priorities, and develop strategy for program development that is likely to be most effective. Numerous other advisory boards can be appointed with respect to specific program areas.

McLure--Disagreed without comment.

Sorenson--Agreed with reservations with comments as follows:

Might be useful. What would be relationship of advisory board and board? Would there be too many boards? Is the board not to be representative?

Stephens--Agreed with comments as follows:

Would stipulate this in legislation--also provide for general operational guidelines of advisory groups (procedural aspects for the evaluation and assessment of existing programs, initiation of new programs, etc.). Membership of local boards not essential if Criterion Seven is given consideration.

Wileman--Agreed with reservations without comment.

This criterion was revised to read as follows:

General Criterion Eleven (revised): There should be a General Advisory Board, made up of one member from the professional staff of each constituent district, to advise and counsel the administrative personnel of the Regional Intermediate Educational Center on all aspects of the operation of the unit. There should be special advisory groups, designated by the governing board, to offer advice and counsel to the personnel of the regional unit.

#### General Criterion Twelve

Intermediate Regional Educational Centers should coordinate and/or provide for the local school districts such programs and services as the following to help them in providing a comprehensive educational program: (1) administrative (business and pupil accounting), (2) cooperative purchasing, (3) research, (4) transportation, (5) curriculum development and consultant services, (6) special education, (7) guidance, (8) educational media, (9) library, (10) health (including psychological and psychiatric services), (11) attendance, and (12) vocational and adult education.

Seven of the authorities agreed or agreed with reservations with this criterion and one authority disagreed.



Brockette--Agreed with reservations with comments as follows:

The services that may be operated by the center should be open. My interpretation of the above statement of those listed are intended as examples.

Brubacher--Agreed with reservations with comments as follows:

. . . but not limited to.

Emerson--Agreed without comment.

Isenberg--Agreed with comments as follows:

All of the functions listed are appropriate in most circumstances for regional operation. There are also others that could be identified--in-service programs for certified and noncertified personnel, education planning, program evaluation, and experimental or pilot projects are examples.

McLure--Agreed without comment.

Sorenson--Agreed with reservations with comments as follows:

It depends on the size of the constituent districts.

Stephens--Disagreed with comments as follows:

Not certain there is disagreement with any one or more of the specifics cited--rather, concerned about specifying any specific program thrusts--would prefer language to read ". . . improvement of educational opportunities. . . ."

Wileman--Agreed without comment.

This criterion was revised to read as follows:

General Criterion Twelve (revised): Regional Intermediate Educational Centers should coordinate and/or provide for the local school districts programs and services which would improve educational opportunities in the districts such as, but not limited to, the following: (1) administrative (business and pupil accounting), (2) cooperative purchasing, (3) research, (4) transportation, (5) curriculum development and consultant services, (6) special education, (7) guidance, (8) educational media, (9) library, (10) health (including psychological and psychiatric services), (11) attendance, (12) vocational and adult education, (13) in-service education programs for certified and noncertified personnel, (14) experimental and pilot programs, and (15) program evaluation.

General Criterion Thirteen

The plan for the financial support of the Intermediate Regional Educational Centers should provide for local-state sharing and should incorporate the principle of equalization.

All eight of the authorities either agreed or agreed with reservations with this criterion.

Brockett--Agreed without comment.

Brubacher--Agreed with reservations with comment as follows:

What about federal and private funds?

Emerson--Agreed without comment.

Isenberg--Agreed with comments as follows:

Currently there are many differences in the way regional programs are supported. Most of the financial support in Washington comes from the state. A large proportion is also state in both New York and California. In Wisconsin and Colorado, all financial support comes from local districts. In Iowa the financing is primarily based on the intermediate units' own tax authority. In many instances, there are combinations of local, intermediate, and state financing.

The combination approach seems to have most merit. Equalization is always an important consideration. More important than any other consideration, however, is that the method of financing regional programs be in harmony with the state's total finance plan for education.

McLure--Agreed without comment.

Sorenson--Agreed with reservations with comments as follows:

I presume you mean by "local," locally levied and collected taxes. In the strictest sense all tax is for support of education (even in a local district) are state taxes.

Stephens--Agreed with comments as follows:

The units should also be eligible for federal monies, gifts, grants, etc., and be permitted to enter into contractual agreements with other public and private agencies.

Wileman--Agreed without comment.

This criterion was revised to read as follows:

General Criterion Thirteen (revised): The plan for the financial support of the Regional Intermediate Educational Centers should provide for local-state sharing and should incorporate the principle of equalization and should be in harmony with the state's total financial plan for education. Provisions should be made for Centers to receive federal and private funds and to make contractual agreements with public and private agencies.

General Criterion Fourteen

In establishing the boundaries of the Intermediate Regional Educational Centers consideration should be given to the following:

- A. The need for a sufficient student population to enable it to provide efficiently and economically a broad range of educational programs and services.
- B. The necessity of providing a support base sufficient to finance at least a minimum Intermediate Regional Educational Center program.
- C. The desirability of keeping intact existing socio-economic communities.
- D. The need to limit the physical size of the Center to assure reasonable accessibility of programs and services to constituent districts.

All eight of the authorities either agreed or agreed with reservations with this criterion.

Brockette--Agreed without comment.

Brubacher--Agreed without comment.

Emerson--Agreed with reservations with comments as follows:

Most people think too small in geography and population of intermediate school districts. In sparsely populated places it is possible to have branch offices. There are examples of this in California. It is more important to have a big student population and a big tax base and a lot of justification for some very high level programs than it is to worry about geography. I can conceive of a good intermediate school district being 300 miles square.

Isenberg--Agreed with reservations with comments as follows:

All of the criteria identified are desirable. In some instances, however, not all of them are possible. If a state had an effective program of financial equalization criteria B would not be important. In extremely sparsely populated areas, criteria A has much greater significance and should command decision-making over criteria C. It is important to limit distance and driving time and to encourage

community involvement as would be possible in terms of criteria D. If a choice has to be made between these characteristics and an area too small to develop an effective program, this criteria should be waived or given much less weight than criteria A. It should be possible to have an extremely large geographical area which might be necessary for an appropriate population base and actually function with satellite centers.

McLure--Agreed without comment.

Sorenson--Agreed with reservations with comments as follows:

If we adopt the center concept let's make sure we make them large enough to get the job done now and in the foreseeable future. Will be struggling to reorganize to eliminate ineffective units of government (school districts, counties, etc.) for a long time to come.

Stephens--Agreed with reservations with comments as follows:

I would hope that some of these, especially C and D, could be further defined, yet not too prescriptive, e.g. (1) existing socio-economic communities, boundaries should be relatively consistent with regional economic and social planning regions, (2) accessibility should be operationalized in terms of optimal driving (time-distance factor) time from unit or its satellite center(s) to local districts.

Wileman--Agreed without comment.

This criterion was revised to read as follows:

General Criterion Fourteen (revised): In establishing the boundaries of the Regional Intermediate Educational Centers consideration should be given to the following:

- A. The need for a sufficient student population to enable it to provide efficiently and economically a broad range of educational programs and services.
- B. The necessity of providing a support base sufficient to finance at least a minimum program.
- C. The need to establish boundaries or areas consistent with economic and social planning regions.
- D. The need to limit the physical size of the Center to assure reasonable accessibility of programs and services to constituent districts.
- E. Satellite centers may be established by the governing board in order to help meet the criteria of student population and accessibility.

Statement of the Revised Criteria

## General Criterion One

Regional Intermediate Educational Centers should exist to promote adequate and comprehensive educational opportunity within their area by: (1) providing essential leadership on a regional basis, (2) providing coordination among the local districts, (3) providing educational programs and services, essential for a comprehensive program of education, to local districts which they are unable to provide effectively and economically for themselves, and (4) performing liaison functions between the State Department of Education and the local districts.

## General Criterion Two

Regional Intermediate Educational Centers should be local education agencies and be an integral part of the State Education System but yet not an arm of the State Department of Education.

## General Criterion Three

All public school districts in the state should be a member of a Regional Intermediate Educational Center. Member districts have the right to choose whether or not they will participate in a particular program and/or service. Member districts may not withdraw from a regional unit and may transfer affiliation only upon approval of the State Department of Education.

## General Criterion Four

The state laws, establishing Regional Intermediate Educational Centers, should define clearly the organization, powers and duties, and financing of the Centers. However, the laws should be sufficiently broad and flexible to allow adaptation to changing educational conditions and needs and to allow individual Regional Intermediate Centers the freedom to develop programs and services based on the desire and needs of their area.

## General Criterion Five

The basic responsibility of Regional Intermediate Educational Centers should be to local school districts with some responsibility to the State Department of Education.

## General Criterion Six

The organizational and operational structure of Regional Intermediate Educational Centers should allow for and encourage cooperation and sharing of services between regional centers and: (1) the local districts, (2) other regional centers, (3) the State Department of Education, (4) area community colleges and area vocational-technical schools, (5) other educational agencies, public and private, (6) health, welfare, and social agencies, and (7) other local, regional, and state governmental agencies.

## General Criterion Seven

The control of the Regional Intermediate Educational Center should be in an elected lay board of education. The governing board should be elected by the constituent school districts.

## General Criterion Eight

The governing board should be composed of from five to eleven members with staggered terms

## General Criterion Nine

The governing board should have the power to develop its own policies, rules, and regulations in keeping with statutory enactments, provisions of the state constitution, and such rules and regulations that may be established by the State Education Agency.

## General Criterion Ten

The powers of the governing board should include authority to:

- A. Adopt policy
- B. Appoint the chief administrator and fix his salary
- C. Appoint the necessary staff members upon the recommendation of the chief administrator
- D. Determine the physical location of the center, subject to the approval of the State Education Agency
- E. Initiate programs and services subject to approval of local advisory groups and the State Education Agency

## General Criterion Eleven

There should be a General Advisory Board, made up of one member from the professional staff of each constituent district, to advise and counsel the administrative personnel of the Regional Intermediate

Educational Center on all aspects of the operation of the unit. There should be special advisory groups, designated by the governing board, to offer advice and counsel to the personnel of the regional unit.

#### General Criterion Twelve

Regional Intermediate Educational Centers should coordinate and/or provide for the local school districts programs and services which would improve educational opportunities in the districts, such as, but not limited to the following: (1) administrative (business and pupil accounting), (2) cooperative purchasing, (3) research, (4) transportation, (5) curriculum development and consultant services, (6) special education, (7) guidance, (8) educational media, (9) library, (10) health (including psychological and psychiatric services), (11) attendance, (12) vocational and adult education, (13) in-service education programs for certified and noncertified personnel, (14) experimental and pilot programs, and (15) program evaluation.

#### General Criterion Thirteen

The plan for the financial support of the Regional Intermediate Educational Centers should provide for local-state sharing and should incorporate the principle of equalization and should be in harmony with the state's total financial plan for education. Provisions should be made for Centers to receive federal and private funds and to make contractual agreements with public and private agencies.

#### General Criterion Fourteen

In establishing the boundaries of the Regional Intermediate Educational Centers consideration should be given to the following:

- A. The need for a sufficient student population to enable it to provide efficiently and economically a broad range of educational programs and services.
- B. The necessity of providing a support base sufficient to finance at least a minimum Regional Intermediate Educational Center program.
- C. The need to establish boundaries or areas consistent with economic and social planning regions.
- D. The need to limit the physical size of the Center to assure reasonable accessibility of programs and services to constituent districts.
- E. Satellite centers may be established by the governing board in order to help meet the criteria of student population and accessibility.

## CHAPTER VI

### STATE PLAN FOR A NETWORK OF REGIONAL INTERMEDIATE EDUCATIONAL CENTERS FOR OKLAHOMA

The major purpose of this study was to develop a plan for a statewide system of Regional Intermediate Educational Centers for Oklahoma. This plan is based upon validated criteria for Regional Intermediate Educational Centers. Chapter V described how these criteria were developed and validated. This chapter presents the proposed state plan based on the validated criteria and recommended procedures for its implementation.

Listed below, on the left side of the page, is the proposed state plan for Regional Intermediate Educational Centers for Oklahoma. Listed on the right are the validated criteria which support that portion of the state plan. The state plan is an expansion of the stated and implied criteria.

#### Proposed State Plan

##### 1.0 Purposes

The basic responsibility of the Regional Intermediate Educational Centers shall be to the local school districts with some responsibility to the State Department of Education. Each Board of Directors of Regional Intermediate Educational Centers shall develop and provide the following basic programs and services to its constituent districts and to the State Department of Education.

#### Supporting Criteria

General Criterion Five: The basic responsibility of Regional Intermediate Educational Centers should be to the local school districts with some responsibility to the State Department of Education.

General Criterion One: Regional Intermediate Educational Centers should exist to promote adequate and comprehensive educational opportunity within their area by: (1) providing essential



Proposed State PlanSupporting Criteria

1.1 Regional educational planning.

1.2 Coordination among constituent districts.

1.3 Educational programs and services as established by the Governing Boards in keeping with the needs and desires of the constituent districts.

1.4 Certain liaison functions between the State Department and local districts.

leadership on a regional basis, (2) providing coordination among the local districts, (3) providing educational programs, and services essential for a comprehensive program of education, to local districts which they are unable to provide effectively and economically for themselves, and (4) performing liaison functions between the State Department of Education and the local districts.

2.0 The Place of Regional Intermediate Educational Centers in the State System of Public Education.

General Criterion Two: Regional Intermediate Educational Centers should be local education agencies and be an integral part of the State Education System but yet not an arm of the State Department of Education.

2.1 Regional Intermediate Educational Centers are local education agencies and therefore an integral part of the State Education System, yet not an arm of the State Department of Education.

2.2 Regional Intermediate Educational Centers have the same relationships to the State Department of Education as local districts.

General Criterion Four: . . . However, the laws should be sufficiently broad and flexible to allow adaptation to changing educational conditions and needs and to allow individual Regional Intermediate Educational Centers to develop programs and services based on the desire and needs of their area.

2.3 The State Department of Education is empowered to establish such rules, regulations, as may be desirable for the effective administration and operation of Regional Intermediate Educational Centers.

2.4 The rules and regulations established by the State Department of Education for Regional Intermediate Educational Centers shall allow for a great deal of flexibility.

Proposed State PlanSupporting Criteria

## 3.0 Legislative structure establishing Regional Intermediate Educational Centers

3.1 The State Laws establishing Regional Intermediate Educational Centers shall define clearly the organization, functions, and financing of the Centers.

3.2 The legislative structure establishing Regional Intermediate Educational Centers shall allow the Centers a high degree of functional and organizational flexibility.

3.3 Each Regional Intermediate Educational Center will be allowed to arrange its own program, within the framework of state rules and regulations, that meet the needs and desires of its constituency.

General Criterion Four: The state laws, establishing Regional Intermediate Educational Centers, should define clearly the organization, powers and duties, and financing of the Centers. However, the laws should be sufficiently broad and flexible to allow adaptation to changing educational conditions and needs and to allow individual Regional Intermediate Educational Centers to develop programs and services based on the desire and needs of their area.

## 4.0 Regional Intermediate Educational Centers and other Agencies

The need for close cooperation, communication, and coordination between Regional Intermediate Educational Centers and other agencies is clear and is encouraged.

## 4.1 Regional Intermediate Educational Centers and local districts.

4.11 Regional Intermediate Educational Centers shall respect the autonomy of local districts in its relationships.

4.12 Policies and procedures shall be developed which will insure that personnel of Regional Intermediate Educational Centers will work with local school districts, under the immediate jurisdiction of the local school district through its designated official.

General Criterion Six: The organizational and operational structure of the Regional Intermediate Educational Centers should allow for and encourage cooperation and sharing of services between regional centers and (1) the local districts, (2) other regional centers, (3) the State Department of Education, (4) area community colleges and area vocational-technical schools, (5) other educational agencies, public and private, (6) health, welfare, and social agencies, and (7) other local, regional, and state governmental agencies.

Proposed State PlanSupporting Criteria

4.20 Regional Intermediate Educational Centers and other regional centers.

4.21 Regional Intermediate Educational Centers shall exchange reports and publications with other regional centers on a regular systematic basis.

4.22 Regional Intermediate Educational Centers may jointly contract with other regional units for the provision of some highly specialized services to local school districts.

4.23 Regional Intermediate Educational Centers may jointly contract with other regional units for the employment of highly specialized personnel who might be needed by the units for special projects.

4.30 Regional Intermediate Educational Centers and Area Community Colleges and Area Vocational-Technical Schools.

4.31 Regional Intermediate Educational Centers consider the establishment of joint contractual agreements with area community colleges and/or area vocational-technical school serving the same region for the provision of some services needed by both agencies and joint contractual agreements for the joint employment of specialized personnel needed by both agencies.

4.32 Directors of Regional Intermediate Educational Centers and directors of area community colleges and/or area vocational-technical schools meet regularly for planning in areas of mutual concern.

Proposed State PlanSupporting Criteria

4.40 Regional Intermediate Educational Centers and other educational agencies.

4.41 Regional Intermediate Educational Centers may contract from various educational agencies for programs and services necessary to fulfill objectives of the program.

4.50 Regional Intermediate Educational Centers and Health, Welfare, and Social Agencies.

4.51 Regional Intermediate Educational Centers may invite representatives of health, welfare, and social agencies to participate in its activities when appropriate.

4.60 Regional Intermediate Educational Centers and other Local, Regional, and State Governmental Agencies.

4.61 Regional Intermediate Educational Centers maintain an inventory of all local, regional and state governmental agencies.

5.0 Participation in the state plan for Regional Intermediate Educational Centers by the Public School Districts.

5.1 All public school districts in the state of Oklahoma shall be assigned to a Regional Educational Center by the State Department of Education.

5.2 Member districts may not withdraw from the regional unit organization.

5.3 Member districts may change regional unit affiliation only by approval of the State Department of Education.

General Criterion Three: All public school districts in the State should be a member of a Regional Intermediate Educational Center. Member districts have the right to choose whether or not they will participate in a particular program and/or service. Member districts may not withdraw from a regional unit, and may transfer affiliation only upon approval by the State Department of Education.

Proposed State PlanSupporting Criteria

5.4 Member districts shall have the right to choose whether or not they will participate in a particular program and/or service.

5.5 School districts with ADA of 25,000 or more may remain in the regional unit to which they are assigned or may be designated a regional unit with the local board serving as the regional unit board and the local superintendent serving as the executive officer of the regional unit.

#### 6.0 Regional Intermediate Educational Centers Geographic Regions

6.1 The State of Oklahoma shall be divided into geographic regions that will make Regional Intermediate Educational Centers physically accessible to all public school districts in the state.

6.11 Minimum student population of 15,000, optimum minimum student population of 25,000.

6.12 Minimum assessed valuation of \$50,000,000, optimum minimum assessed valuation of \$75,000,000.

6.13 Economic and social planning regions will be considered when boundaries of the Center are established.

6.14 Maximum driving time from the offices or from a satellite office to attendance centers of member districts is limited to one hour.

6.2 Geographic regions for Regional Intermediate Educational Centers. (The proposed geographical regions, with some modifications, follow the regions outlined by Adams in his study.)<sup>1</sup>

General Criterion Fourteen: In establishing the boundaries of the Regional Intermediate Educational Centers, consideration should be given to the following:

A. The need for a sufficient student population to enable it to provide efficiently and economically a broad range of educational programs and services.

B. The necessity of providing a support base sufficient to finance at least a minimum Regional Intermediate Educational Center program.

C. The need to establish boundaries or areas consistent with economic and social planning regions.

D. The need to limit the physical size of the Center to assure reasonable accessibility of programs and services to constituent districts.

E. Satellite centers may be established by the governing board

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<sup>1</sup>Adams, op. cit., pp. 40-42.

Proposed State PlanSupporting Criteria

in order to help meet the criteria of student population and accessibility.

Region 1 counties of Beaver, Cimarron, Texas, Dewey, Ellis, Harper, Major, Woods, and Woodward, with a 1968-69 ADA of 17,151 and assessed valuation of \$256,031,427.

Region 2 counties of Alfalfa, Garfield, and Grant, with a 1968-69 ADA of 15,032 and assessed valuation of \$143,209,534.

Region 3 counties of Kay, Noble, Osage, and Pawnee, with a 1968-69 ADA of 20,037 and assessed valuation of \$160,147,456.

Region 4 counties of Craig, Delaware, Mayes, Nowata, Ottawa, and Washington, with a 1968-69 ADA of 30,131 and assessed valuation of \$148,729,292.

Region 5 counties of Adair, Cherokee, McIntosh, Muskogee, and Sequoyah, with a 1968-69 ADA of 29,998 and assessed valuation of \$103,644,601.

Region 6 counties of Hughes, Okmulgee, Okfuskee, Seminole and Pottawatomie, with a 1968-69 ADA of 27,722 and assessed valuation of \$108,523,889.

Region 7 counties of Choctaw, Haskell, Latimer, LeFlore, McCurtain, Pittsburg, and Pushmataha, with a 1968-69 ADA of 31,773 and assessed valuation of \$96,230,829.

Region 8 counties of Pontotoc, Coal, Atoka, Johnston, Marshall, and Bryan, with a 1968-69 ADA of 17,950 and assessed valuation of \$78,742,774.

Proposed State PlanSupporting Criteria

Region 9 counties of Carter, Garvin, Jefferson, Love, Murray, and Stephens, with a 1968-69 ADA of 47,891 and assessed valuation of \$152,514,390.

Region 10 counties of Lincoln, Logan, and Payne, with a 1968-69 ADA of 15,865 and assessed valuation of \$95,374,196.

Region 11 counties of Creek, Rogers, Tulsa, and Wagoner, with a 1968-69 ADA of 111,795 and assessed valuation of \$754,398,449.

Region 12 counties of Cleveland, McClain, and Oklahoma, with a 1968-69 ADA of 137,845 and assessed valuation of \$736,152,021.

Region 13 counties of Blaine, Caddo, Canadian, Grady, and Kingfisher, with a 1968-69 ADA of 25,301 and assessed valuation of \$204,748,827.

Region 14 counties of Beckham, Custer, Roger Mills, Washita, Greer, Harmon, Jackson, and Kiowa, with a 1968-69 ADA of 24,805 and assessed valuation of \$156,464,810.

Region 15 counties of Commanche, Cotton, and Tillman, with a 1968-69 ADA of 25,847 and assessed valuation of \$94,831,872.

#### 7.0 Board of Education of Regional Intermediate Educational Centers.

7.1 Regional Intermediate Educational Centers shall be controlled by an elected lay board of education.

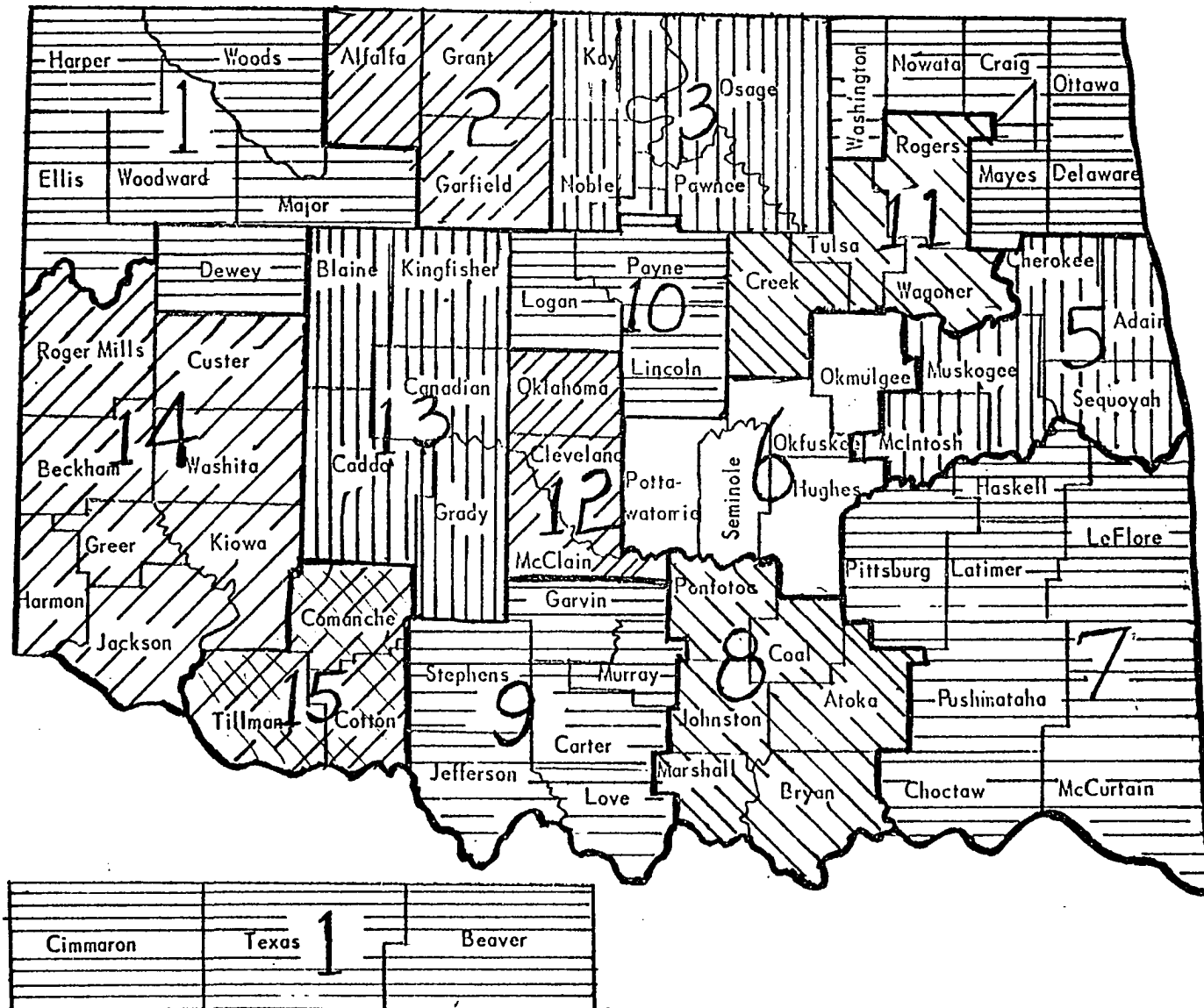
7.2 The board of education shall be composed of from 7 to 11 members.

General Criterion Seven: The control of Regional Intermediate Educational Centers should be in an elected board of education. The governing board should be elected by the constituent local school districts.

General Criterion Eight: The governing board should be composed of from 7 to 11 members with staggered terms.

FIGURE 27

REGIONS IDENTIFIED AS SUITABLE FOR REGIONAL INTERMEDIATE EDUCATIONAL CENTERS FOR OKLAHOMA





Proposed State PlanSupporting Criteria

7.3 The board of education shall be elected by the constituent district boards. Not more than one member shall be elected from a single constituent district.

7.4 The term of the members of the board of education shall be for four (4) years.

7.5 Elections shall be held in May of each year.

#### 8.0 Functions of the Board of Education of Regional Intermediate Educational Centers.

8.1 The powers of the Board of Education are subject to the state laws, and such rules and regulations that the State Department of Education may establish.

8.11 The board has the responsibility to adopt policy.

8.12 The board has the responsibility to appoint the chief administrator and fix the term of office and salary.

8.13 The board has the responsibility to appoint necessary staff members upon recommendation of the chief administrator.

8.14 The board has the responsibility to determine the budget of the Regional Intermediate Educational Center and approve all fiscal arrangements, policies, and agreements.

8.15 The board has the responsibility to establish the physical location of the center and necessary satellite centers, subject to the approval of the State Department of Education.

General Criterion Ten: The powers of the governing board should include authority to:

A. Adopt policy

B. Appoint the chief administrator and fix his salary

C. Appoint the necessary staff

D. Determine its own budget within revenue limitations

E. Establish the physical location of the center, subject to approval of the State Department of Education.

F. Initiate programs and services subject to the approval of local advisory groups and the State Department of Education.

Proposed State PlanSupporting Criteria

8.16 The board has the responsibility to initiate programs and services subject to approval of local advisory groups and the State Department of Education.

#### 9.0 Regional Intermediate Educational Center Advisory Boards.

9.1 Each Regional Intermediate Educational Center shall have a General Advisory Board to advise and counsel the administrative personnel of the unit on all aspects of the operation of the unit.

9.11 The advisory board shall be composed of one member of the professional staff of each constituent district.

9.12 The advisory board shall meet regularly.

9.13 The advisory board shall: (1) recommend new programs and services, (2) assist in the evaluation of programs and services, and (3) serve as liaison between the regional unit and local districts.

9.2 Each Regional Intermediate Educational Center shall have, at the discretion of the governing board, as many special advisory groups as necessary to advise and counsel the personnel of the regional unit.

#### General Criterion Eleven:

There should be a General Advisory Board, made up of one member from the professional staff of each constituent district, to advise and counsel the administrative personnel of the Regional Educational Center on all aspects of the operation of the unit. There should be special advisory groups designated by the governing board to offer advice and counsel to the personnel of the regional unit.

10.0 Programs and services, such as those included in this section, illustrate the type programs and services coordinated and/or provided to the local districts by Regional Intermediate Educational Centers.

Proposed State Plan

10.1 Administrative and business management consultative services.

10.2 Cooperative purchasing services.

10.3 Research programs and services.

10.4 Transportation programs and services.

10.5 Curriculum development and consultant services.

10.6 Special education programs and services.

10.7 Guidance programs and services.

10.8 Educational media services.

10.9 Library services.

10.10 Health services.

10.10-1 Psychological and psychiatric services.

10.10-2 Health consultant programs and services.

10.11 Attendance services.

10.12 Vocational and adult education programs and services.

10.13 Experimental and pilot programs.

10.14 Evaluation programs and services.

Supporting Criteria

General Criterion Twelve: Regional Intermediate Educational Centers should coordinate and/or provide for the local school districts programs and services which would improve educational opportunities in the districts, such as, but not limited to the following: (1) administrative (business and pupil accounting), (2) cooperative purchasing, (3) research, (4) transportation, (5) curriculum development and consultant services, (6) special education, (7) guidance, (8) educational media, (9) library, (10) health (including psychological and psychiatric services), (11) attendance, (12) vocational and adult education, (13) in-service education programs for certified and noncertified personnel, (14) experimental and pilot programs, and (15) program evaluation.

Proposed State PlanSupporting Criteria

## 11.0 Financing Regional Intermediate Educational Centers.

Financial support for Regional Intermediate Educational Centers will come from state aid, federal funds, foundation grants, and local districts. The method of financing the Centers will be in harmony with the state's total financial plan for education.

## 11.1 Support from the state.

11.1-1 A grant of \$50,000 to each Center in the state.

11.1-2 Support which would accrue to an individual school district if it were performing a service that is performed by the Center.

11.2 Regional Intermediate Educational Centers are authorized to receive and, under appropriate accounting procedures, expend money from federal, foundations, or private sources.

## 11.3 Support from local districts.

11.3-1 Member districts will be assessed \$2.00 per pupil in average daily attendance to support the Center's administrative and central office expenditures.

11.3-2 Member districts may support expenses of programs and services in which they participate with other constituent districts on a basis proportioned to benefits received, on a plan developed by the governing board in cooperation with the district boards.

## General Criterion Thirteen:

The plan for the financial support of the Regional Intermediate Educational Centers should provide for local-state sharing and should incorporate the principle of equalization and should be in harmony with the state's total financial plan for education.

Provisions should be made for Centers to receive federal and private funds and to make contractual agreements with public and private agencies.

Proposed State PlanSupporting Criteria

11.3-3 Member district shall support in full the programs and services they contract individually, in accordance with formulas developed by the governing board in cooperation with district boards.

Implementation

A statewide system of Regional Intermediate Educational Centers has great potential for making comprehensive programs and services available to all school districts in the state of Oklahoma. If this potential is to be realized it will be necessary that a plan for a statewide network of Regional Intermediate Educational Centers be adopted and legislation enacted to establish and maintain such a system.

One way to implement a statewide network of Regional Intermediate Educational Centers would be for the Legislature to adopt the plan developed in this study; enact needed legislation for the establishment and operation of Regional Intermediate Educational Centers; and charge the State Department of Education with the implementation of the plan. However, the experiences of other states suggests that it is desirable to follow a different procedure in establishing regional units. Therefore, the following recommendations for implementation are included as a part of the plan:

1. The Legislature enact legislation requiring the State Board of Education to develop a plan for a statewide network of Regional Intermediate Educational Centers including recommendations for needed legislation and make necessary appropriations to finance this work.

2. The State Board of Education endorse the Regional Intermediate Educational Center concept and accept the plan developed in this study as a framework for the development of a final plan for a network of Regional Intermediate Educational Centers.

3. The State Board of Education appoint a Regional Intermediate Educational Center Commission. The Commission should have as its members representatives from:

A. The State Department of Education (the chairman of the Commission should be a staff member of the State Department of Education).

B. The Legislature.

C. Colleges and universities of the State.

D. Oklahoma Education Association.

E. The Governor's Office.

F. Health, welfare, and social agencies.

4. The Commission should be charged with:

A. Familiarizing itself with the Regional Intermediate Educational Center concept.

B. Holding regional meetings to acquaint local boards, administrators, teachers, and citizens with the Regional Intermediate Educational Center concept.

C. Appointing subcommittees to work on and make recommendations to the Committee on particular problems such as the organization and control, programs and services, financing, boundaries of Regional Intermediate Educational Centers and needed legislation to organize and operate such units.

D. Developing a tentative plan for a statewide system of Regional Intermediate Educational Centers using its own background and data, and data presented by the subcommittees.

E. Hold regional meetings in the tentative regional areas to explain the plan and get reactions.

F. Complete the plan for a statewide system of Regional Intermediate Educational Centers and submit it to the State Board of Education.

5. The State Board of Education adopt the state plan submitted to it by the Commission and present it to the Legislature for enactment of needed legislation.

6. The State Department of Education be charged with putting the plan into action.

## CHAPTER VII

### SUMMARY, CONCLUSIONS, AND RECOMMENDATIONS

#### Summary

The purpose of this study was to develop a plan for a statewide system of Regional Intermediate Educational Centers for Oklahoma. The limited enrollment of many school districts in Oklahoma and the limited financial resources of many of these school districts cause many disparities in the educational opportunities available to the people of the state. However, the necessity of providing broader educational programs and services is not lessened because of the limitations of the local school districts. The county intermediate units in Oklahoma, as they are now structured, are, in a majority of instances, inadequate in size and resources to provide help to the local districts in the way of special programs and services. The Regional Intermediate Educational Center is viewed by many as the most promising unit to better utilize existing resources, develop new resources, and provide programs and services to local school districts. Further, it is believed that Regional Intermediate Educational Centers can help overcome present inadequacies and provide essential educational opportunities for the state, while maintaining a desirable degree of local control. In order to develop a plan for a statewide system of Regional Intermediate Educational Centers, the following procedures were followed: (1) Review of the literature on intermediate units, (2) review of the state plans of the states which operate regional intermediate units, (3) survey of practices in states



operating regional intermediate units through questionnaires sent to state coordinators and selected executive directors of regional intermediate units in the same states, (4) develop and validate general criteria to be used in developing the plan for a system of Regional Intermediate Educational Centers for Oklahoma, and (5) develop a plan for the State of Oklahoma based on the validated criteria.

The review of the related literature was undertaken in order to (1) trace the historical development of the intermediate unit in the United States, (2) examine the present status of the intermediate unit in the United States, and (3) survey the writings of professional educators on the needs, purposes, organization and control, programs and services, and financing of intermediate units in the United States. From the review of the literature it was determined that in most states the intermediate unit was started as a county unit in response to need of the state to have an agent close to the people to help maintain communication with schools. It was found that 32 states had some type of intermediate unit in operation in 1967-68. Further, 11 of those 32 states had made recent major changes in the structure of their intermediate units in some instances, resulting in a new type of intermediate unit.

The new type of intermediate units are largely multicounty with basic responsibility to local districts, and are service oriented. Writers reviewed generally were in agreement that intermediate units should be: (1) a part of the state system of education but not an arm of the State Department of Education; (2) established to provide leadership to local districts on a regional basis, supplementary services

to local districts, and liaison between local districts and the State Department of Education; (3) governed by an elected lay board of directors, which appoints the executive director and staff of the regional unit; (4) provided with an advisory board to counsel the administrative staff on all aspects of the operation of the unit; (5) provide programs and services that local districts cannot provide for themselves or that can be provided more efficiently or economically by the regional unit; and (6) supported from state sources, regional unit area, local districts, and federal and private sources.

Letters were mailed to all of the states that operated regional units asking them to send materials describing their state plans governing regional units. The information gathered from these materials were reviewed in Chapter III. New York started regional units in 1948. However, the next state to introduce regional units did not do so until 1962, with most states starting in 1965. The titles of the regional units vary greatly but most include the word "service" in the title. The minimum student population required was from no specific number to 50,000. The basic purpose of most units is to provide special services to local districts. The governing body is usually an elected lay board. Most of the states select the executive officer of the regional unit by governing body appointment. Most states receive support from the same sources that are mentioned above: state, regional unit area, local districts, and federal and private sources.

A "survey of practices" questionnaire was developed and sent to state coordinators and selected executive directors in the states having regional units. Information gathered from the review of the related

literature and from the review of the state plans was used in developing the questionnaire. The questionnaire was submitted to school administrators who were familiar with regional unit operation, and to members of the State Department of Education for their evaluation and comments. In all, 43 questionnaires were mailed and 31, or 72%, were returned completed. All of the states surveyed were represented by at least two returned questionnaires. The responses were reviewed in Chapter IV. A wide variety of practices and procedures in regional unit organization and operation were identified. Most respondents reported satisfaction with their practices and indicated that very little change would be taking place in their operations.

Fourteen general criteria were developed from the related literature, the state plans, and the "survey of practices" questionnaire. These fourteen criteria were validated in the following manner: The original criteria were submitted to a panel of eight general administration and intermediate unit authorities. The members of the panel were asked to either agree, agree with reservations, or disagree with the criteria. They were also asked to write comments that expressed their views on the stated criteria. The writer recorded their evaluations and comments and made revisions in the criteria based on the responses given by the panel members. The development and validation of the criteria were presented in Chapter V. The revised criteria are:

General Criterion One: Regional Intermediate Centers should exist to promote adequate and comprehensive educational opportunity within their area by: (1) providing essential leadership on a regional basis, (2) providing coordination among the local districts, (3) providing educational programs and services, essential for a comprehensive program of education, to local districts which they are unable to provide effectively and economically for themselves, and (4) performing liaison functions between the State Department of Education and the local districts.

General Criterion Two: Regional Intermediate Educational Centers should be local education agencies and be an integral part of the State Education System but yet not an arm of the State Department of Education.

General Criterion Three: All public school districts in the state should be a member of a Regional Intermediate Educational Center. Member districts have the right to choose whether or not they will participate in a particular program and/or service. Member districts may not withdraw from a regional unit and may transfer affiliation only upon approval of the State Department of Education.

General Criterion Four: The State Laws, establishing Regional Intermediate Educational Centers, should define clearly the organization, powers and duties, and financing of the Centers. However, the laws should be sufficiently broad and flexible to allow adaptation to changing educational conditions and needs and to allow individual Regional Intermediate Centers the freedom to develop programs and services based on the desire and needs of their area.

General Criterion Five: The basic responsibility of Regional Intermediate Educational Centers should be to local school districts with some responsibility to the State Department of Education.

General Criterion Six: The organizational and operational structure of Regional Intermediate Educational Centers should allow for and encourage cooperation and sharing of services between regional centers and: (1) the local districts, (2) other regional centers, (3) the State Department of Education, (4) area community colleges and area vocational-technical schools, (5) other educational agencies, public and private, (6) health, welfare, and social agencies, and (7) other local, regional, and state governmental agencies.

General Criterion Seven: The control of the Regional Intermediate Educational Center should be in an elected board of education. The governing board should be elected by the constituent school districts.

General Criterion Eight: The governing board should be composed of from five to eleven members with staggered terms.

General Criterion Nine: The governing board should have the power to develop its own policies, rules, and regulations in keeping with statutory enactments, provisions of the state constitution, and such rules and regulations that may be established by the State Education Agency.

General Criterion Ten: The powers of the governing board should include authority to:

- A. Adopt policy.
- B. Appoint the chief administrator and fix his salary.
- C. Appoint the necessary staff members upon the recommendation of the chief administrator.
- D. Determine the physical location of the center, subject to the approval of the State Education Agency.
- E. Initiate programs and services subject to approval of local advisory groups and the State Education Agency.

General Criterion Eleven: There should be a General Advisory Board, made up of one member from the professional staff of each constituent district, to advise and counsel the administrative personnel of the Regional Intermediate Educational Center on all aspects of the operation of the unit. There should be special advisory groups, designated by the governing board, to offer advice and counsel to the personnel of the regional unit.

General Criterion Twelve: Regional Intermediate Educational Centers should coordinate and/or provide for the local school districts programs and services which would improve educational opportunities in the districts, such as, but not limited to the following: (1) administrative (business and pupil accounting), (2) cooperative purchasing, (3) research, (4) transportation, (5) curriculum development and consultant services, (6) special education, (7) guidance, (8) educational media, (9) library, (10) health (including psychological and psychiatric services), (11) attendance, (12) vocational and adult education, (13) in-service education programs for certified and noncertified personnel, (14) experimental and pilot programs, and (15) program evaluation.

General Criterion Thirteen: The plan for the financial support of the Regional Intermediate Educational Centers should provide for local-state sharing and should incorporate the principle of equalization and should be in harmony with the state's total financial plan for education. Provisions should be made for Centers to receive federal and private funds and to make contractual agreements with public and private agencies.

General Criterion Fourteen: In establishing the boundaries of the Regional Intermediate Educational Centers, consideration should be given to the following:

- A. The need for a sufficient student population to enable it to provide efficiently and economically a broad range of educational programs and services.
- B. The necessity of providing a support base sufficient to finance at least a minimum Regional Intermediate Educational Center program.
- C. The need to establish boundaries or areas consistent with economic and social planning regions.

- D. The need to limit the physical size of the Center to assure reasonable accessibility of programs and services to constituent districts.
- E. Satellite centers may be established by the governing board in order to help meet the criteria of student population and accessibility.

The state plan, developed from the revised criteria, is presented in Chapter VI and is summarized in outline form below.

1. The basic responsibility of the Regional Intermediate Educational Centers shall be to the local school districts with some responsibility to the State Department of Education. Each Board of Directors of Regional Intermediate Educational Centers shall develop and provide the following basic programs and services to its constituent districts and to the State Department of Education:

- A. Regional educational planning
- B. Coordination among constituent districts.
- C. Educational programs and services.
- D. Liaison functions between the State Department of Education and local districts.

2. Regional Intermediate Educational Centers are local education agencies and an integral part of the State Education System, yet not an arm of the State Department of Education.

3. Legislative structure establishing Regional Intermediate Educational Centers shall define clearly the organization, functions, and financing of the Centers but shall be flexible to allow Centers to arrange their own program.

4. Regional Intermediate Educational Centers' cooperative relationships with other agencies are clear and shall be encouraged. The agencies are: the local districts, other regional centers, the State Department of Education, area community colleges and area vocational-technical schools, educational agencies (public and private), health, welfare, and social agencies, and other local, regional, and state governmental agencies.

5. All public school districts in the state of Oklahoma shall be assigned to a Regional Intermediate Educational Center and can transfer affiliation only by approval of the State Department of Education. However, member districts have the right to choose whether or not they will participate in a particular program and/or service. A district with an ADA of 25,000 or more may remain with the regional unit to which it is assigned or may be designated a separate regional unit.

6. The State of Oklahoma shall be divided into geographic regions that will make Regional Intermediate Educational Centers physically accessible to all public school districts in the State. The Centers shall be based upon the following criteria:

- A. Minimum student population, 15,000; optimum minimum student population, 25,000.
- B. Minimum assessed valuation of \$50,000,000; optimum minimum assessed valuation of \$75,000,000.
- C. The existing socio-economic communities will be taken into consideration when the boundaries are established.
- D. The maximum driving time from the Center office or from a satellite office to attendance centers of member districts is limited to one hour.

The regions and their characteristics are given below, using 1968-69 statistics:

Region 1 includes 9 counties and has an ADA of 17,151 and assessed valuation of \$256,031,427.

Region 2 includes 3 counties and has an ADA of 15,032 and assessed valuation of \$143,209,534.

Region 3 includes 4 counties and has an ADA of 20,037 and assessed valuation of \$160,147,456.

Region 4 includes 6 counties and has an ADA of 30,131 and assessed valuation of \$148,729,292.

Region 5 includes 5 counties and has an ADA of 29,998 and assessed valuation of \$103,644,601.

Region 6 includes 5 counties and has an ADA of 27,722 and assessed valuation of \$108,523,889.

Region 7 includes 7 counties and has an ADA of 31,773 and assessed valuation of \$96,230,829.

Region 8 includes 6 counties and has an ADA of 17,950 and assessed valuation of \$78,742,774.

Region 9 includes 6 counties and has an ADA of 27,891 and assessed valuation of \$152,514,390.

Region 10 includes 3 counties and has an ADA of 15,865 and assessed valuation of \$95,374,196.

Region 11 includes 4 counties and has an ADA of 111,795 and assessed valuation of \$754,398,449.

Region 12 includes 3 counties and has an ADA of 137,845 and assessed valuation of \$736,152,021.

Region 13 includes 5 counties and has an ADA of 25,301 and assessed valuation of \$204,748,827.

Region 14 includes 8 counties and has an ADA of 24,805 and assessed valuation of \$156,464,810.

Region 15 includes 3 counties and has an ADA of 25,847 and assessed valuation of \$94,831,872.

7. The control of Regional Intermediate Educational Centers shall be in the hands of elected lay boards of education. The boards shall be composed of from 7 to 11 members elected by the board members of the constituent districts and serve for four-year terms.

8. The powers of the Regional Intermediate Education Center's Board of Education are subject to the state laws, and such rules and regulations that the State Department of Education may establish. The board has, among other responsibilities, the responsibility to adopt policy; appoint the chief administrator and fix his salary; appoint the necessary staff members upon the recommendation of the chief administrator; determine the budget and approve all fiscal arrangements, policies, and agreements; establish the physical location of the center and necessary satellite centers, subject to the approval of the State Department of Education; and initiate programs and services subject to approval of local advisory groups and the State Department of Education.

9. Each Regional Intermediate Educational Center shall have a General Advisory Board to advise and counsel the administrative personnel of the unit on all aspects of the operation of the unit and shall have as many special advisory groups as necessary to advise and counsel the personnel of the regional unit.

10. Programs and services will be provided and/or coordinated by Regional Intermediate Educational Centers to local districts to improve educational opportunities in those districts. Illustrative of the types of programs and services are (1) administrative and business management consultant services, (2) cooperative purchasing services, (3) research programs and services, (4) transportation programs and services, (5) curriculum development and consultant services, (6) special education programs and services, (7) guidance programs and services, (8) educational media services, (9) library services, (10) health services, (11) attendance services, (12) vocational and adult education programs and services, and (13) evaluation programs and services.



11. Financial support will come from state aid in the form of a grant to each unit; federal, foundations and private sources; and support from local districts on the basis of per pupil assessments and/or contractual agreements.

12. Implementation of the plan shall be in the following manner: (1) the Legislature enact legislation requiring the State Board of Education to develop a plan for a statewide system of Regional Intermediate Educational Centers, including recommendations for needed legislation; (2) the State Board of Education endorse the Regional Intermediate Educational Center concept and accept the plan developed in this study as a framework for the development of a final plan for a system of such units; (3) the State Board of Education appoint a Regional Intermediate Educational Center Commission and finance its operation; (4) the Commission shall have as its members representatives from the State Department of Education, the legislature, the colleges and universities of the State, the Oklahoma Education Association, the Governor's Office, and from health, welfare, and social agencies; (5) the Commission shall be charged with completing a state plan for a system of Regional Educational Centers and submitting it to the State Board of Education; (6) the State Board of Education adopt the state plan and submit it to the Legislature for enactment of needed legislation; and (7) the Legislature charge the State Department of Education with putting the plan into action.

### Conclusions

1. An intermediate school district is needed in all states, (including Oklahoma), which continue to use the community-type local district as the basic unit of school organization. This conclusion is borne out by the writings of professional educators on intermediate units and the number of states that operate intermediate units.

2. The intermediate unit, in the United States, must undergo significant changes in purpose, organization and control, services and programs, and financing if it is to serve a real purpose in education. This conclusion is borne out by the number of states that have made major changes in the structure of their intermediate units and the number of states that are conducting studies on how best to restructure their intermediate units.

3. Effective intermediate units can be developed to serve the changing needs of local districts. This conclusion is borne out by the success of other states in developing effective intermediate units. In most cases the legislation was preceded by research and careful planning.

4. The 14 general criteria developed in this study are to be considered as guideposts in establishing Regional Intermediate Educational Centers in Oklahoma.

5. The State of Oklahoma can be divided into 15 Regional Intermediate Educational Centers which meet the established criteria for Regional Intermediate Educational Centers for Oklahoma.

#### Recommendations

1. It is recommended that the implementation portion of this plan be followed in establishing a statewide network of Regional Intermediate Education Centers for Oklahoma.

2. It is recommended that the following dates be used as guidelines for those responsible for the development of a plan for a statewide network of Regional Educational Centers.

A. The 1970 Legislature enact legislation requiring the State Board of Education to develop a plan for a statewide network of Regional Intermediate Educational Centers.

B. The State Board of Education appoint the Regional Intermediate Educational Center Commission by July 1, 1970.

C. The Commission conduct the regional meetings to acquaint the citizens of the state with the regional unit concept by October 31, 1970.

D. The Commission appoint the various sub-committees by December 1, 1970. The reports of the sub-committees are due by February 1, 1971.

E. The Commission's tentative plan to be completed by April 1, 1971.

F. The Commission hold regional meetings explaining the plan from May 1 through July 1, 1971.

G. The Commission complete the plan and submit it to the State Board of Education by November 1, 1972.

H. The State Board of Education adopt the plan and submit it to the 1972 Legislature.

3. It is recommended that when a network of Regional Intermediate Educational Centers are established in Oklahoma the office of County Superintendent be discontinued.

#### Recommendations for Further Study

4. It is recommended that the following studies be conducted to provide answers to crucial questions concerning Regional Intermediate Educational Centers.

A. A study to explore ways that regional agencies serving a common area might cooperate, thus avoiding duplication of effort--such agencies might include area vocational-technical schools, community colleges, and regional educational units.

B. A study to develop standards for Regional Intermediate Educational Centers that could be used for evaluation and/or accreditation purposes.

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## APPENDICES

## APPENDIX A

Letter to the State Superintendents

Dear Sir:

I am gathering information on regional service units or intermediate service units and would appreciate your help. The information would be used by the State of Oklahoma, which is currently considering the possibility of establishing such units, and by me in writing a dissertation.

We need, as quickly as possible, information on the following:

1. Laws, Legislative provisions
2. Organization--at the State level and the Regional level. How does the local district fit in?
3. Finance--State, Regional, and Local
4. Programs--actual or proposed programs (please indicate) to serve the local districts.
5. Names, locations, and vital information such as size of districts making up the regional unit, personnel, etc.
6. Evaluation--any evaluation reports from the regional units on the effectiveness of their programs. Any cumulative evaluation on a State level. This is especially important.

This information will be very useful to us and we appreciate your cooperation.

Sincerely,

Leonard Hall

## APPENDIX B

Letter to State Coordinators and Selected Executive  
Directors of Regional Educational Centers Introducing  
the Questionnaire, and the Questionnaire.

The enclosed questionnaire is a part of a study sponsored by the Oklahoma State Department of Education. It is hoped from the study that a state plan for regional educational centers can be developed. This is also the area of a doctoral study I am currently attempting at the University of Oklahoma. Realizing that your state has had experience in organizing and operating some type of regional unit or intermediate unit, I would appreciate your help in completing the enclosed questionnaire and returning it in the addressed envelope at an early date.

The purpose of the questionnaire is to obtain information on your state's current practices, on how effective the practices have proved to be in your state, and concerning changes planned or changes that you feel are needed. You have been selected to participate because of your position and experience.

As an educator, I am aware of the demands on your time so this instrument has been designed so that it can be completed in a short period of time.

Your assistance in this study is greatly appreciated. You may receive a summary of the information compiled from this questionnaire upon request.

Thank you.

Respectfully,

Leonard Hall

Questionnaire

Please respond to the following statements by (1) putting a check in the left hand column, beside the statement that most nearly describes your present practice, (2) circling the code letter at the right of the same statement that most nearly describes your professional judgment on the effectiveness of the practice, and (3) briefly indicating, on the lines provided, what changes, if any, are planned, or changes you feel are needed to make regional units more effective in your state. These comments are most important to the study.

Place X in the blank beside the statement that most nearly describes your present practices.

How effective has this practice proved to be in your state?

- a) very satisfactory--  
no change anticipated
- b) works fairly well--  
no change contemplated
- c) unsatisfactory--changes  
planned/needed

## Regional Unit Organization and Control

1. In your state each regional unit is controlled by a governing board.  
 \_\_\_yes \_\_\_no. If yes, complete this section. If no, briefly describe how they are controlled and then skip to number 2, on page 2.

- A. The governing board is an appointed lay board that is
- |                                                   |       |
|---------------------------------------------------|-------|
| ___ (1) appointed by the governor                 | a b c |
| ___ (2) appointed by the state board of education | a b c |
| ___ (3) other, specify _____                      | a b c |

If "c" is circled at the right, briefly indicate the nature of changes planned/needed. \_\_\_\_\_

- B. The governing board is an elected lay board that is
- |                                                                     |       |
|---------------------------------------------------------------------|-------|
| ___ (1) elected from the constituent boards by the<br>board members | a b c |
| ___ (2) elected from the constituent boards by the<br>citizens      | a b c |
| ___ (3) elected by popular election                                 | a b c |
| ___ (4) other, specify _____                                        | a b c |

If "c" is circled at the right, briefly indicate the nature of changes planned/needed. \_\_\_\_\_



Place X in the blank  
beside the statement  
that most nearly des-  
cribes your present  
practices

How effective has this  
practice proved to be in  
your state?

- a) very satisfactory--  
no change anticipated
- b) works fairly well--  
no change anticipated
- c) unsatisfactory--changes  
planned/needed

C. Other, specify \_\_\_\_\_ a b c

If "c" is circled at the right, briefly indicate the nature of  
changes planned/needed. \_\_\_\_\_

2. In your state each regional unit's board is composed of:

- \_\_\_\_\_ A. 5 members a b c
- \_\_\_\_\_ B. 7 members a b c
- \_\_\_\_\_ C. 9 members a b c
- \_\_\_\_\_ D. one member for each constituent school district a b c
- \_\_\_\_\_ E. other, specify \_\_\_\_\_ a b c

If "c" is circled at the right, briefly indicate the nature of  
changes planned/needed. \_\_\_\_\_

3. In your state each regional unit has an advisory board. \_\_\_\_yes \_\_\_\_no.  
If yes, complete this section. If no, skip to number 4 on page 3.

A. The advisory board is composed of:

- \_\_\_\_\_ (1) 5 members a b c
- \_\_\_\_\_ (2) 7 members a b c
- \_\_\_\_\_ (3) 9 members a b c
- \_\_\_\_\_ (4) one representative from each constituent school  
district a b c
- \_\_\_\_\_ (5) other, specify \_\_\_\_\_ a b c

If "c" is circled at the right, briefly indicate the nature  
of changes planned/needed. \_\_\_\_\_

B. Members of the advisory board are

- \_\_\_\_\_ (1) appointed by the state board of education a b c
- \_\_\_\_\_ (2) appointed by the governing board a b c

Place X in the blank  
beside the statement  
that most nearly des-  
cribes your present  
practices

How effective has this  
practice proved to be in  
your state?

a) very satisfactory--  
no change anticipated

b) works fairly well--  
no change anticipated

c) unsatisfactory--changes  
planned/needed

- |                                                                                             |       |
|---------------------------------------------------------------------------------------------|-------|
| <input type="checkbox"/> (3) appointed by the executive director of the regional unit       | a b c |
| <input type="checkbox"/> (4) elected by popular election                                    | a b c |
| <input type="checkbox"/> (5) elected by the professional staff in each constituent district | a b c |
| <input type="checkbox"/> (6) other, specify _____                                           | a b c |

If "c" is circled at the right, briefly indicate the nature  
of changes planned/needed. \_\_\_\_\_

4. In your state all public school districts:

- |                                                                            |       |
|----------------------------------------------------------------------------|-------|
| <input type="checkbox"/> A. are required to be a member of a regional unit | a b c |
| <input type="checkbox"/> B. have the option of being or not being a member | a b c |
| <input type="checkbox"/> C. other, specify _____                           | a b c |

If "c" is circled at the right, briefly indicate the nature of  
changes planned/needed. \_\_\_\_\_

Since large districts usually present special problems in regard to  
regional units, please provide the following supplemental informa-  
tion.

In your state large districts:

- |                                                                                                                |       |
|----------------------------------------------------------------------------------------------------------------|-------|
| <input type="checkbox"/> A. Enrollment of _____ or more are organized into separate units                      | a b c |
| <input type="checkbox"/> B. have the same provisions as other districts                                        | a b c |
| <input type="checkbox"/> C. have special provisions for participation if they have enrollment of _____ or more | a b c |

Briefly describe special provisions. \_\_\_\_\_

- |                                                  |       |
|--------------------------------------------------|-------|
| <input type="checkbox"/> D. other, specify _____ | a b c |
|--------------------------------------------------|-------|

If "c" is circled at the right, briefly indicate the nature of  
changes planned/needed. \_\_\_\_\_

Place X in the blank beside the statement that most nearly describes your present practices.

How effective has this practice proved to be in your state?

a) very satisfactory--  
no change anticipated

b) works fairly well--  
no change anticipated

c) unsatisfactory--changes  
planned/needed

5. In your state school districts that are members of a regional unit:

- |                             |                                                          |       |
|-----------------------------|----------------------------------------------------------|-------|
| <input type="checkbox"/> A. | do not have the right to withdraw from the regional unit | a b c |
| <input type="checkbox"/> B. | have the right to withdraw at any time                   | a b c |
| <input type="checkbox"/> C. | have the right to withdraw after a length of time        | a b c |
| <input type="checkbox"/> D. | other, specify _____                                     | a b c |

If "c" is circled at the right, briefly indicate the nature of changes planned/needed. \_\_\_\_\_

6. In your state a minimum total student population is required to establish a regional unit. ☐yes ☐no. If yes, complete this section. If no, skip to number 7.

- |                             |                      |       |
|-----------------------------|----------------------|-------|
| <input type="checkbox"/> A. | 5,000 minimum        | a b c |
| <input type="checkbox"/> B. | 10,000 minimum       | a b c |
| <input type="checkbox"/> C. | 25,000 minimum       | a b c |
| <input type="checkbox"/> D. | 50,000 minimum       | a b c |
| <input type="checkbox"/> E. | other, specify _____ | a b c |

If "c" is circled at the right, briefly indicate the nature of changes planned/needed. \_\_\_\_\_

7. In your state a minimum number of local school districts is required to establish a regional unit. ☐yes ☐no. If yes, complete this section. If no, skip to number 8.

- |                             |                      |       |
|-----------------------------|----------------------|-------|
| <input type="checkbox"/> A. | 5 minimum            | a b c |
| <input type="checkbox"/> B. | 10 minimum           | a b c |
| <input type="checkbox"/> C. | 15 minimum           | a b c |
| <input type="checkbox"/> D. | other, specify _____ | a b c |

If "c" is circled at the right, briefly indicate the nature of changes planned/needed. \_\_\_\_\_

Place X in the blank  
beside the statement  
that most nearly des-  
cribes your present  
practices.

How effective has this  
practice proved to be in  
your state?

- a) very satisfactory--  
no change anticipated
- b) works fairly well--  
no change anticipated
- c) unsatisfactory--changes  
planned/needed

8. In your state a minimum total assessed valuation of the constituent school districts is required to establish a regional unit.  
\_\_\_yes \_\_\_no. If yes, complete this section. If no, skip to number 9 on page 5.

- \_\_\_ A. \$50,000,000 minimum a b c
- \_\_\_ B. \$75,000,000 minimum a b c
- \_\_\_ C. \$100,000,000 minimum a b c
- \_\_\_ D. \$150,000,000 minimum a b c
- \_\_\_ E. other, specify \_\_\_\_\_ a b c

If "c" is circled at the right, briefly indicate the nature of  
changes planned/needed. \_\_\_\_\_

9. In your state a minimum total number of teachers in the constituent districts is required to establish a regional unit. \_\_\_yes \_\_\_no.  
If yes, complete this section. If no, skip to number 10.

- \_\_\_ A. 250 minimum a b c
- \_\_\_ B. 500 minimum a b c
- \_\_\_ C. 1,250 minimum a b c
- \_\_\_ D. 2,500 minimum a b c
- \_\_\_ E. other, specify \_\_\_\_\_ a b c

If "c" is circled at the right, briefly indicate the nature of  
changes planned/needed. \_\_\_\_\_

10. In your state a maximum driving time from the regional unit center to the attendance center of any constituent district is required to establish a regional unit. \_\_\_yes \_\_\_no. If yes, complete this section. If no, skip to number 11.

- \_\_\_ A. 30 minutes maximum a b c
- \_\_\_ B. 45 minutes maximum a b c
- \_\_\_ C. 1 hour maximum a b c
- \_\_\_ D. other, specify \_\_\_\_\_ a b c

Place X in the blank beside the statement that most nearly describes your present practices.

How effective has this practice proved to be in your state?

- a) very satisfactory--  
no change anticipated
- b) works fairly well--  
no change anticipated
- c) unsatisfactory--changes  
planned/needed

If "c" is circled at the right, briefly indicate the nature of changes planned/needed. \_\_\_\_\_

11. In your state the employees of each regional unit have salary schedules and fringe benefits similar to:

- \_\_\_ A. local districts a b c
- \_\_\_ B. the state department of education a b c
- \_\_\_ C. other, specify \_\_\_\_\_ a b c

If "c" is circled at the right, briefly indicate the nature of changes planned/needed. \_\_\_\_\_

12. In your state the executive director of the regional units is selected:

- \_\_\_ A. by a governing body appointment a b c
- \_\_\_ B. by an advisory board appointment a b c
- \_\_\_ C. by popular election a b c
- \_\_\_ D. other, specify \_\_\_\_\_ a b c

If "c" is circled at the right, briefly indicate the nature of changes planned/needed. \_\_\_\_\_

13. In your state the salary range of the executive director of the regional units is

- \_\_\_ A. set by the governing board a b c
- \_\_\_ B. set by legislation a b c
- \_\_\_ C. other, specify \_\_\_\_\_ a b c

If "c" is circled at the right, briefly indicate the nature of changes planned/needed. \_\_\_\_\_

Place X in the blank beside the statement that most nearly describes your present practices.

How effective has this practice proved to be in your state?

a) very satisfactory--  
no change anticipated

b) works fairly well--  
no change anticipated

c) unsatisfactory--changes  
planned/needed

14. In your state the basic responsibility of the regional unit is

- |                             |                                                                                      |       |
|-----------------------------|--------------------------------------------------------------------------------------|-------|
| <input type="checkbox"/> A. | to the state department of education with no responsibility to the local districts   | a b c |
| <input type="checkbox"/> B. | to the state department of education with some responsibility to the local districts | a b c |
| <input type="checkbox"/> C. | to the local districts with no responsibility to the state department of education   | a b c |
| <input type="checkbox"/> D. | to the local districts with some responsibility to the state department of education | a b c |
| <input type="checkbox"/> E. | other, specify _____                                                                 | a b c |

If "c" is circled at the right, briefly indicate the nature of changes planned/needed. \_\_\_\_\_

15. In your state the responsibility for setting up a statewide system of regional units was given:

- |                             |                                          |       |
|-----------------------------|------------------------------------------|-------|
| <input type="checkbox"/> A. | to the state department of education     | a b c |
| <input type="checkbox"/> B. | to a commission created for that purpose | a b c |
| <input type="checkbox"/> C. | other, specify _____                     | a b c |

If "c" is circled at the right, briefly indicate the nature of changes planned/needed. \_\_\_\_\_

Please add any additional comments or observations concerning "Organization and Control" that would be helpful to a state that is contemplating the establishing of regional units.

Place X in the blank  
beside the statement  
that most nearly des-  
cribes your present  
practices.

How effective has this  
practice proved to be in  
your state?

- a) very satisfactory--  
no change anticipated
- b) works fairly well--  
no change anticipated
- c) unsatisfactory--changes  
planned/needed

#### Programs and Services of Regional Units

16. In your state the programs and services to local districts provided  
by regional units are

- ☐ A. those classified as supplemental a b c
- ☐ B. those that local districts can't provide a b c
- ☐ C. those that can be provided more economically by a  
regional unit a b c
- ☐ D. other, specify \_\_\_\_\_ a b c

If "c" is circled at the right, briefly indicate the nature of  
changes planned/needed. \_\_\_\_\_

17. In your state proposals for programs and services to be provided  
by the regional unit are initiated by:

- ☐ A. the state department of education a b c
- ☐ B. the governing body a b c
- ☐ C. the advisory board a b c
- ☐ D. local districts through their administrators a b c
- ☐ E. the regional unit after surveys are made a b c
- ☐ F. other, specify \_\_\_\_\_ a b c

If "c" is circled at the right, briefly indicate the nature of  
changes planned/needed. \_\_\_\_\_

18. In your state the programs and services of each regional unit:

- ☐ A. are mandatory to all constituent districts a b c
- ☐ B. are optional to constituent districts a b c
- ☐ C. certain services are optional and others mandatory a b c
- ☐ D. other, specify \_\_\_\_\_ a b c

If "c" is circled at the right, briefly indicate the nature of  
changes planned/needed. \_\_\_\_\_

Place X in the blank  
beside the statement  
that most nearly des-  
cribes your present  
practices.

How effective has this  
practice proved to be in  
your state?

- a) very satisfactory--  
no change anticipated
- b) works fairly well--  
no change anticipated
- c) unsatisfactory--changes  
planned/needed

- \_\_\_ 19. In your state provisions are made for individual constituent school districts to contract, apart from regular procedures, certain services (for example, data processing) from the regional unit. a b c

If "c" is circled at the right, briefly indicate the nature of changes planned/needed. \_\_\_\_\_

- \_\_\_ 20. In your state provisions are made for regional units to contract services from local school districts. a b c

If "c" is circled at the right, briefly indicate the nature of changes planned/needed. \_\_\_\_\_

- \_\_\_ 21. In your state provisions are made for regional units to contract services from other agencies such as colleges and universities. a b c

If "c" is circled at the right, briefly indicate the nature of changes planned/needed. \_\_\_\_\_

- \_\_\_ 22. In your state provisions are made for regional units to contract services from other regional units. a b c

If "c" is circled at the right, briefly indicate the nature of changes planned/needed. \_\_\_\_\_

- \_\_\_ 23. In your state provisions are made for regional units to contract for some services from the state department of education. a b c

If "c" is circled at the right, briefly indicate the nature of changes planned/needed. \_\_\_\_\_



Place X in the blank  
beside the statement  
that most nearly des-  
cribes your present  
practices.

How effective has this  
practice proved to be in  
your state?

- a) very satisfactory--  
no change anticipated
- b) works fairly well--  
no change anticipated
- c) unsatisfactory--changes  
planned/needed

- \_\_\_ 24. In your state provisions are made for the state depart-  
ment to contract services from the regional unit. a b c

If "c" is circled at the right, briefly indicate the  
nature of changes planned/needed. \_\_\_\_\_

- \_\_\_ 25. In your state regional units actually operate certain  
programs (such as special education, a b c

If "c" is circled at the right, briefly indicate the  
nature of changes planned/needed. \_\_\_\_\_

- \_\_\_ 26. In your state regional units only coordinate programs and  
services but the actual operation is left to the constit- a b c  
uent districts.

If "c" is circled at the right, briefly indicate the  
nature of changes planned/needed. \_\_\_\_\_

Please add any additional comments or observations concerning  
"Programs and Services" that would be helpful to a state that is con-  
templating the establishing of regional units.

#### Financing of Regional Units

- \_\_\_ 27. In your state the regional unit's governing body is able to  
determine its own budget. \_\_\_yes \_\_\_no. If yes, complete  
this section. If no, skip to number 28. a b c

- \_\_\_ A. The budget is not subject to review by another  
authority. a b c
- \_\_\_ B. The budget is subject to review by other authorities. a b c
- \_\_\_ C. The budget must be passed by a vote of the people. a b c
- \_\_\_ D. Other, specify \_\_\_\_\_ a b c

Place X in the blank  
beside the statement  
that most nearly des-  
cribes your present  
practice.

How effective has this  
practice proved to be in  
your state?

- a) very satisfactory--  
no change anticipated
- b) works fairly well--  
no change anticipated
- c) unsatisfactory--changes  
planned/needed

If "c" is circled at the right, briefly indicate the  
nature of changes planned/needed. \_\_\_\_\_

- \_\_\_ 28. In your state the regional units are authorized to levy  
taxes to cover current operating expenses. \_\_\_yes \_\_\_no.  
If yes, complete this section. If no, skip to number 29. a b c

\_\_\_ Tax levy is limited to \_\_\_ mills on assessed valuation. a b c

Use of revenue from levy of tax on property of regional unit's  
area:

- \_\_\_ A. is limited to administrative expenses of regional  
unit. a b c
- \_\_\_ B. is limited to expenditures for programs and ser-  
vices of regional unit. a b c
- \_\_\_ C. may be used to support the general budget of the  
regional unit. a b c
- \_\_\_ D. other, specify \_\_\_\_\_ a b c

If "c" is circled at the right, briefly indicate the  
nature of changes planned/needed. \_\_\_\_\_

- \_\_\_ 29. In your state the regional unit's governing body has the  
authority to incur bonded indebtedness. \_\_\_yes \_\_\_no.  
If yes, complete this section. If no, skip to number 30.

- \_\_\_ A. The bonded indebtedness is unlimited. a b c
- \_\_\_ B. The bonded indebtedness is limited to \_\_\_ percent of  
total net assessed valuation of the regional unit.
- \_\_\_ C. Other, specify \_\_\_\_\_ a b c

If "c" is circled at the right, briefly indicate the  
nature of changes planned/needed. \_\_\_\_\_

Place X in the blank  
beside the statement  
that most nearly des-  
cribes your present  
practice.

How effective has this  
practice proved to be in  
your state?

a) very satisfactory--  
no change anticipated

b) works fairly well--  
no change anticipated

c) unsatisfactory--changes  
planned/needed

\_\_\_ 30. In your state there is a basic flat grant from the state  
to each regional unit. \_\_\_yes \_\_\_no. If yes, complete  
this section. If no, skip to number 31. a b c

\_\_\_ A. The grant is the same amount to each regional unit. a b c

\_\_\_ B. The grant is on a per pupil and/or per teacher basis. a b c

\_\_\_ C. Other, specify \_\_\_\_\_ a b c

If "c" is circled at the right, briefly indicate the  
nature of changes planned/needed. \_\_\_\_\_

\_\_\_ 31. In your state regional units receive support through an  
equalization and/or incentive program. \_\_\_yes \_\_\_no. If  
yes, complete this section. If no, skip to number 32. a b c

\_\_\_ A. This program is an integral part of the local-state  
program for support of public schools. a b c

\_\_\_ B. This program is separate from local-state public  
school support program, but has equalization and/or  
incentive features. a b c

\_\_\_ C. Other, specify \_\_\_\_\_ a b c

If "c" is circled at the right, briefly indicate the  
nature of changes planned/needed. \_\_\_\_\_

\_\_\_ 32. In your state part of all of the expenditures of the  
regional unit are borne by the constituent districts.  
\_\_\_yes \_\_\_no. If yes, complete this section. If no,  
skip to number 33. a b c

A. Administrative expenditures are met:

\_\_\_ (1) by equal assessment to all districts a b c

\_\_\_ (2) on a formula basis a b c

\_\_\_ (3) other, specify \_\_\_\_\_ a b c

If "c" is circled at the right, briefly indicate the  
nature of changes planned/needed. \_\_\_\_\_

Place X in the blank  
beside the statement  
that most nearly des-  
cribes your present  
practice.

How effective has this  
practice proved to be in  
your state?

- a) very satisfactory--  
no change anticipated
- b) works fairly well--  
no change anticipated
- c) unsatisfactory--changes  
planned/needed

B. Expenditures for programs and services are met:

- \_\_\_ (1) by equal assessment to all constituent districts a b c
- \_\_\_ (2) by assessment formula based on programs and ser- a b c  
vices entered
- \_\_\_ (3) other, specify \_\_\_\_\_ a b c

If "c" is circled at the right, briefly indicate the  
nature of changes planned/needed. \_\_\_\_\_

- \_\_\_ 33. In your state provisions are made for regional units to  
apply for and receive federal grants. \_\_\_yes \_\_\_no. If  
yes, complete this section. If no, skip this section a b c

- \_\_\_ A. Regional units can apply directly to the Federal  
Government. a b c
- \_\_\_ B. Regional units apply through the state department  
of education for federal grants. a b c
- \_\_\_ C. Other, specify \_\_\_\_\_ a b c

If "c" is circled at the right, briefly indicate the  
nature of changes planned/needed. \_\_\_\_\_

Please add any additional comments or observations on "Finan-  
cing of Regional Units" that would be helpful to a state that is  
contemplating the establishing of regional units.

#### APPENDIX C

Letter to Authorities Requesting that They Serve on the Panel to Evaluate the Criteria, and Letter to the Panel Explaining Procedures for Evaluating the Criteria and Sample Page of the Instrument.

My doctoral committee at the University of Oklahoma has approved my research proposal to develop a plan for a statewide network of Regional Educational Centers for the State of Oklahoma. The approach to this problem will be essentially in three steps: (1) the development of criteria from (a) states' plans for regional units from the states that actually operate regional units, (b) responses to questionnaires sent to state coordinators and selected executive directors of regional units in those states, and (c) the related professional literature; (2) the validation of the criteria by a panel of professional educators; and (3) the proposal of a statewide plan based on the validated criteria.

My purpose in writing you is to ask if you would be kind enough to serve as a member of the panel. We are asking eight of the leading authorities in the field to assist in validating the criteria and hope that you will be willing to assist us as one of these authorities.

This study is being sponsored by the Oklahoma State Department of Education.

A card is enclosed on which you may indicate your decision.

Respectfully,

Leonard Hall

Thank you for accepting the invitation to serve on a panel of authorities to assist in validating criteria for Intermediate Regional Education Centers for the State of Oklahoma. The criteria listed on the enclosed pages are based on (1) a review of the literature concerning present practices and recommendations of criteria for Regional Units, (2) state plans for Regional Units, and (3) responses to questionnaires by state coordinators and selected executive directors of intermediate regional units.

Please check the appropriate space indicating your agreement or disagreement with the criteria and your comments below the criteria. Also, please add important omissions as they occur to you.

Thank you for your assistance.

Respectfully,

Leonard Hall

General Criterion One: Intermediate Regional Educational Centers should exist to promote adequate and comprehensive educational opportunity for all children within their area by: (1) providing essential leadership, (2) providing educational programs and services, essential for a comprehensive program of education, to local districts which then are unable to provide effectively and economically for themselves, and (3) performing liaison functions between the State Department of Education and the local districts.

\_\_\_\_ Agree

\_\_\_\_ Agree with Reservations

\_\_\_\_ Disagree

General Criterion Two: Intermediate Regional Educational Centers should be local education agencies and be an integral part of the State Education System but yet not an arm of the State Department of Education.

\_\_\_\_ Agree

\_\_\_\_ Agree with Reservations

\_\_\_\_ Disagree

COMMENTS: