ABSTRACT
        This topical outline was developed by the directors
of the various Simu-School projects. It contains the following main
headings: An Introduction to Comprehensive Educational Planning,
Preparation for Planning, The Planning Process, Implementation,
Activities Related to the Planning Process, Functions and Needs That
Permeate the Planning Process, Components of the Comprehensive
Educational Plan, Planning Techniques, and Annotated Bibliography.
(Author/IRT)

A GUIDE FOR COMPREHENSIVE EDUCATIONAL PLANNING - A TOPICAL OUTLINE

Prepared by

Kenneth W. Brooks

Prepared for

PROJECT SIMU-SCHOOL

February 1974

2

A Guide for Comprehensive Educational Planning - A Topical Outline*

I. An Introduction to Comprehensive Educational Planning

A. Prelude to comprehensive educational planning

1. Historical antecedents leading to modern educational
    planning

2. Planning as it exists today versus what planning ought
    to be

B. A definition of comprehensive educational planning

1. Relationship to other kinds of planning such as:
    comprehensive planning, city and regional planning,
    management planning

2. Relationship of planning to administration/management

3. Three levels of comprehensive educational planning -
    Strategic (SEA), Tactical (LEA), and Operational
    (building or operating program level)

4. The varying time frames for planning - (short-range,
    medium range, and long-range)

5. Distinguishing characteristics of comprehensive
    educational planning - (flexibility, catalystic aspect,
    scope, breadth)

---

*This topical outline was developed by the directors of the various Simu-
School projects. It was developed on January 17 and 18, 1974 at Ohio
State University.

3

C. The "Wh

    1. Ne

    2. Va

    3. Pr

D. Limitat

   should

E. The "Wh

    1. Co

    2. Co

    3. Le

    4. Sc

    5. St

    6. Ex

      re

      me

      ed

II. Preparation

   in the plann

   since it is

   be accomplis

A. Paramet

   should

   for any

   to the

   planner

hy" of comprehensive educational planning

eed for planning

alues gained from planning

roducts and outcomes of planning

tions - (What comprehensive educational planning

 not be expected to do?)

io" of planning

omprehensive educational planning staff and their role

ommunity involvement

egal decision makers

chool district staff

tudents

xperts outside education - (This would include

epresentatives from the other social and govern-

ental agencies impinging upon comprehensive

lucational planning at the local level.)

for Planning - (This could be considered the first step

iing process. It is separated from the planning process

in many ways preliminary. All of the following should

hed prior to beginning the process of planning.)

ers of "The Comprehensive Educational Plan" - (These

be established prior to beginning the planning process

 plan. In many cases, they will be "givens" presented

planner. In other cases, it may be necessary for the

 to investigate and establish these.)

4

A.   (Continued)

    1.   Scope of the plan

    2.   Time frame related to the plan

    3.   Depth or specificity to be achieved in the plan

B.   Analysis of resources available for planning

    1.   Human resources

    2.   Financial resources

    3.   Time resources

C.   Creating the planning organization

    1.   Staff

    2.   Placing the planning function within the school

        system - (This should include establishment of

        appropriate communication channels.)

D.   Preparing a structure for planning - (This actually involves

network analysis.)

    1.   Identification of major tasks to be accomplished

        a.   Breaking of tasks into manageable components

        b.   Complete definition of each component

    2.   Assessing of tasks and selecting techniques

    3.   Assigning resources to each task

    4.   Assigning a time frame to each task

    5.   Assigning of responsibility for each task

E.   The end product of "Preparation for Planning" - (At the
conclusion of this activity, the planning staff should have
a specific plan to be followed in the process of planning.
This plan should include the tasks to be achieved, resources
to be utilized, responsibilities to be assumed by each member
of the staff, deadlines to be met, and a definition of the
end product to be produced.)

III. The Planning Process - (The following topics are presented in a
somewhat sequential order although the process by its very nature
will allow deviation from the sequence listed.)

A.   ʋal development

1.   Definition of a goal - (Goals are broad direction setters
and are not expected to be achieved.)

a.   Relevance of goals

b.   Applicability of goals

c.   Goals as compared to values

2.   Identification of goals

3.   Prioritizing of goals

4.   Assessing the level of goal achievement

B.   Objectives development - (Objectives are more specific than
goals, measurable, directly related to goals, and connect
a goal to a specific program.)

1.   Definition of objectives

a.   Goals as compared to objectives

b.   Achievability of objectives

c.   Time as related to objectives

B. (Continued)

    2. Delineating objectives

    3. Prioritizing objectives

    4. Establishing the criteria for measurement of objectives achievement

    5. Assessing the level of objectives achievement

C. Development and synthesis of curriculum and instruction plans –
(It should be pointed out that in the planning process it is
important to first develop and synthesize the plan for learning.
Once this plan is developed, it is possible to move on to
support system plans. A basic assumption is that schools are
created for the purpose of learning and all other activities
occurring in the school system can be viewed as a support
system. Based upon this assumption, the curriculum and
instruction plan is first developed and then the support
system plans are detailed.)

    1. Definition of an alternative

    2. Explanation of the hierarchical relationship between
alternative curriculum and instruction plans,
objectives, and goals

    3. Dependence of the support system plans upon the
curriculum and instruction plan

    4. Identifying alternative plans

    5. Analyzing alternative plans

    6. Synthesis/selection of a plan

D.   Development and synthesis of alternative support system
     plans - (The support system plans include the following.)

     1.   Relationship of support system plans to the curriculum
          and instruction plan .

     2.   Identification of alternative support system plans

     3.   Analyzing of alternative support system plans

     4.   Synthesis/selection of alternative support system .
          plans

E.   Convergence of the comprehensive educational plan and
     development of the strategy for implementation

     1.   Achieving an integrated comprehensive educational plan

     2.   Developing an overall strategy for implementing the
          comprehensive educational plan

IV. Implementation - (This is an operational activity rather than a
     planning activity. At the same time, however, implementation is
     essential if planning is to be meaningful and therefore should be
     discussed at this point.)

     A.   Responsibility for implementation

     B.   Planner's role in supporting implementation

V.   Activities Related to the Planning Process

     A.   Evaluating the comprehensive educational plan

     B.   Modifying the plan

     C.   Recycling - (Recycling refers to re-entering the process. At
          any point during the process it may become necessary to return
          to the beginning or to some previous step as a result of the
          introduction of new data.)

VI. Functions and Needs that Permeate the Planning Process

    A. Data and information

        1. Definition of data - (This includes an explanation of the kinds of data, the difference between data and information, and a review of possible uses of data.)

        2. The need for a systems approach to data

        3. Validation of data ("Crap detector" - Steinbeck)

        4. Levels of data

        5. The base data system

        6. Data trees

    B. Involvement and participation in planning

        1. Definition of involvement and participation

            a. Involvement is the essence of planning

            b. Involvement must be on a differential basis

        2. Role of the community in planning

        3. Role of students in planning

        4. Role of the staff in planning

        5. Role of the board of education in planning

        6. Involvement of other social agencies and governmental bodies in planning

    C. Evaluation of the planning process - (Evaluation of planning should be continuous from the beginning of the process through completion of the plan.)

D.   Non-linear aspect of the planning process - (Planning cannot

be viewed as a linear series of events always occurring in

a repetitive cycle. While the process of planning as outlined

represents a generalized sequence typical to planning, it is

actually more interactive. One step in the process functions

in an interactive way with other steps.)

VII. Components of the Comprehensive Educational Plan

A.   Introduction to the contents of a comprehensive educational

plan

1.   Writing style

2.   Considerations as to possible audiences

3.   Style of publication

4.   Use to be made of the comprehensive educational plan

B.   The curriculum and instruction plan - (This is the key component

of the comprehensive educational plan. This aspect of the plan

must be finalized somewhat before the other areas or

components can be properly addressed. In this component

of the plan, the following topics are typically addressed:

overall philosophy of learning, role of the teacher, the

organization for learning, learning styles to be addressed,

content to be emphasized, and students to be accommodated

in the school system.)

10

C.   Support system plans – (The following plans have one thing
     in common.   They are all designed to support the implemen-
     tation of the plan just described.)

     1.   Staff personnel plan – (This plan typically will
          address the following topics: the number of staff
          members required, the specific roles to be demanded
          of staff, the estimated costs of the staffing
          described, the approaches to be taken in the
          acquisition of staff, the techniques or procedures
          to be used in the evaluation of staff, the in-service
          and/or pre-service to be emphasized with staff, and
          the induction of new staff.)

     2.   Logistics plan – (This part of the plan would include
          transportation, food service, maintenance and custodial
          services, and data system maintenance.)

     3.   External relations plan – (This component of the plan
          relates the learning process to the other social
          agencies and governmental bodies operating in the
          locale.   Typically, it would relate the school system
          to agencies such as: city or regional planning,
          hospital planning, recreation and parks department,
          higher education, non-public education, and local
          economic planning.   This aspect of the plan may also
          address the task of conveying to the general public
          the general status of the school system.).

11

4. Facilities plan - (This component of the plan would

describe the sites and the facilities needed to house

the curriculum and instruction plan.

5. Organizational plan - (This aspect of the plan includes

those decisions and intents regarding the organization

of the school system and of the staff. Included may

be plans for inter-staff communication.)

6. Financial plan - (The available resources and how they

will be allocated should be outlined.)

VIII. Planning Techniques

A. Definition and introduction to the concept of planning
techniques

B. Matrix - (See Figure 1. This matrix will attempt to

relate available planning techniques to the planning

process as outlined above.)

C. Outlining of individual techniques - (For each technique,

the following items should be identified if applicable.)

1. The relevance to specific steps in the process of
planning

2. Definition and explanation of the technique

3. Outcomes and possible uses of the technique

4. Costs associated with the technique

5. Time typically consumed in using the technique

6. Limitations often associated with the technique

7. Simu-school documents that discuss the technique

8. Additional references

\\

FIGURE 1 - RELATIONSHIP OF PLANNING TECHNIQUES

TO THE PLANNING PROCESS

Techniques	Preparation for Planning	Goal Development	Objectives Development	Curriculum/Instruction Plan Development	Support System Plan Development	Evaluating the Plan	Modifying the Plan	Recycling	Data System	Involvement in Planning	Evaluating the Planning Process
Elements of the Planning Process											
1.											
2.											
3.											
4.											
5.											
6.											
7.											
8.											
9.											
10.											

13

Possible Techniques

A. Advocate Team Process

B. Convergent Team Process

C. Charette

D. Network Analysis

E. Brainstorming

F. Delphi

G. Phi Delta Kappa Goal Analysis

H. SPECS Goal Analysis

I. PPBS

J. Simulation

K. ARIOLE

L. Input/Output Analysis

M. Enrollment Projection

N. Saturation Analysis

IX. Annotated Bibliography - (The bibliography shall include the
title and reference material for each entry and a paragraph
or two describing the citation. The entries should be
arranged by topic. The topics should be associated with the
guide outline.)