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DEVELOPMENT OF A MODEL FOR THE COOPERATIVE
ADMINISTRATION OF THE SEVEN AMERICAN-
SUPPORTED ELEMENTARY SCHOOLS IN
THE EASTERN EUROPEAN COUNTRIES

by

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A DISSERTATION

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CHAPTER I
AMERICAN SCHOOLS OVERSEAS

The international thrust of American business and foreign policy of the past twenty-five years has scattered American citizens all over the world, a citizenry of world-traveling families whose children have at least the same educational needs as their stateside friends. Responsive to those needs is a topsy-like growth of American-oriented schools, unique in location and problems, but providing an American-type educational opportunity abroad. Generally, the schools are recent in origin, American in philosophy, international in enrollment, and flexible in organization to meet the needs of a community of American civilians.

Although there is no accurate listing including all schools which enroll American children on a world wide basis, the total may be in excess of one thousand different institutions. The Department of Defense operates three hundred and five schools, and there are more than one hundred and twenty independently organized schools of sufficient American enrollment to be defined by the United States Department of State Office of Overseas Schools as American-sponsored overseas schools. In addition, there

are many more schools about the globe which for a variety of reasons enroll American children. The European Council of International Schools (ECIS), an organization only seven years old, admits to Council membership schools whose basic languages of instruction include English and whose enrollment, faculty, and curriculum differ from that of the host-country. The 1970 ECIS Directory lists sixty-three member schools all of which enrolled American children, and the Council membership is but one-third that of the older and more prestigious International Schools Association (ISA) whose English language and non-national membership criteria are similarly attractive to Americans. The enrollment qualifications and total membership of the two international schools organizations suggest that in Europe alone there may well be more than five hundred schools DOD, American-supported, and other private schools enrolling American children. There are American overseas schools in Africa, the Middle East, the Far East and in Central and South America where the oldest of the schools have long served the interests of the U. S. government and business abroad. Very likely, an accurate compilation of data from all schools enrolling American children outside the United States would be impressive numerically and geographically.

The total number of Americans living abroad is estimated to be one percent of the United States population

and nearly half are civilians. The United States government for years has posted foreign service officers and other personnel in all parts of the world, but the most recent increase of Americans abroad is from the private sector. Mr. E. S. Groo, IBM World Trade Corporation, in a 1969 address in Frankfurt, Germany reported, "In this day of rapidly expanding international business, there are probably as many or more people in the foreign service of business as there are in the foreign service of the United States."¹ That Mr. Groo's audience was comprised of heads of some seventy overseas schools located in Europe further emphasized the purpose of the remarks; the interest of the American private business sector in the availability and quality of American-supported overseas schools for the dependent children of businessmen posted abroad. The priority assigned by American international business to overseas educational opportunities for dependents is of the highest rank:

All of us send people to overseas assignments, people with children who need facilities for continuing American education. . . . And nothing will obstruct the free movement of people to assignments abroad more quickly than a lack of suitable education for their children.²

¹Groo Outlines Advisory Council Activities and Concerns, AASA Newsletter, Vol. 1 Winter 1969 (E. S. Groo address to the Fall Conference of the ECIS in Frankfurt).

²Ibid.

Mr. Groo's remarks are substantiated by those of Ambassador John M. Steeves, Director General of the U. S. Foreign Service, as he describes the overseas priorities of Foreign Service Officers to an assembly of concerned school administrators:

The requirements of overseas education stand right alongside the need for medical attention--both of which are primary support needs--if we are going to recruit good people and maintain them in a healthy condition and in good morale with any kind of continuity and stability in our overseas communities.³

It is evident that whatever the geographical assignment of the American abroad, most tend to ". . . carry their most important institutions with them. . . ." ⁴ Although some overseas Americans place their children in host-country schools or in established international schools, most prefer the security of the American-oriented institutions:

Few Americans living overseas have available to them anything which approximates free, public education for their children. These people, rather than send their children away for their education, have chosen to establish and operate community schools wherever they are stationed.⁵

³"Overseas Schools and the Foreign Service," Department of State Newsletter, May 1967, p. 17.

⁴Robert G. Seaquist, "A Study to Develop a Planning Base for the Association of Colombian-American Binational Schools" (unpublished dissertation, University of Alabama, 1968), p. 1.

⁵Paul T. Luebke, American Elementary and Secondary Schools Abroad, No. 77-112496 (Washington, D.C.: American Association of School Administrators, 1969), p. 7.

The result of the world-wide business expansion of the post-war years is an impressive number of American-supported schools founded and maintained in nearly one hundred foreign countries and dependencies abroad.

In recognition of the increasing number of American dependent children seeking education abroad, the International Education Act was introduced in 1966 by President Johnson who emphasized that these schools ". . . should be showcases for excellence in education. They should help make overseas service attractive to our own citizens."⁶ The International Education Act gave national recognition to the existence and needs of American children abroad, and Congressional attention directed to their educational requirements is reflected in the remarks of Representative William D. Ford, a member of the House Education and Labor Committee:

It is apparent that resources of the United States Government available for the improvement of educational opportunities for American children should also be made available to American-citizen children living overseas. Their parents are serving the interests of the United States abroad: they are in danger of becoming educationally-disadvantaged youth if resources which would be available to them at home are denied them while their parents serve abroad.⁷

⁶President Lyndon B. Johnson's Message to Congress, Department of State Bulletin, Vol. LIV No. 1392 (Washington Printing Office, February 28, 1966), p. 328.

⁷William D. Ford (Rep. Mich.), Address to the Sixteenth Annual Conference of the Council of International Schools, Near East-South Asia, Athens, Greece, November 24, 1969.

Representative Ford's remarks carried not only the weight of Congressional prestige but also the validity of his experience as a member of the House investigation committee assigned the on-site task of evaluating the educational opportunities for dependent children abroad. The efforts of the House Education and Labor Committee magnified the concern of Congressman Ford and further publicized the needs of American dependent children living overseas with their parents.

The year 1966 can be regarded as the beginning of a new era in the history and development of American-sponsored overseas schools. The legislative action of Congress, the vested concern of the American private sector, the Presidential publicity of the International Education Act, and the professional assistance of the previously established U. S. Department of State Office of Overseas Schools (A/OS) joined forces to the introduction of an era of rapidly developing assistance to the needed improvement of educational opportunities for American children abroad.

Although the International Education Act of 1966 was not funded, its authorization signaled to the U. S. Department of State Congressional approval for an active concern for the educational needs of dependent children. Recognizing the interest from the private sector, the State Department requested leaders in business and professions in early 1965 to join ". . . top U. S. officials

as advisors to the Department in the conduct of its large-scale program of assistance to American-sponsored schools abroad."⁸ The resulting organization is the Overseas Schools Advisory Council whose membership includes experienced American international business and professional leaders typified by Chairman, Mr. A. Marvin Braverman, Washington, D. C. Attorney. Upon the appointment of Mr. Braverman to the chairmanship of the Council, Secretary of State Dean Rusk underscored the problem and objectives to be met through the collaboration of the State Department and business:

I learned with pleasure that you and other leaders of the business community have agreed to serve as members of the Department's Overseas Schools Advisory Council. Your willingness to serve in this capacity indicates that you share with me the view that American children whose parents serve overseas should enjoy educational opportunities equal to those available in the United States.

In 1964 we established our Office of Overseas Schools with a staff of professional educators to work on education for American dependents overseas. Since that time considerable progress has been made in raising the standards of the American-sponsored overseas schools. However, there are still many difficult problems which we must overcome if we are to accommodate the growing numbers of children seeking an American-type education overseas.⁹

Secretary Rusk, in the letter, further described the Department objectives for the Council:

⁸Department of State Newsletter, May 1967, "Prestigious Group to Advise on Overseas Schools," pp. 16-17.

⁹Ibid., pp. 16-17.

--To help the American-sponsored elementary schools abroad become showcases for excellence in education.

--To help make overseas service attractive to American citizens in the business community and in government.¹⁰

One year later speaking at a luncheon given for the members of the Overseas Schools Advisory Council, Rusk re-emphasized that ". . . a major concern of parents who are asked to serve abroad by Government and business is the quality of educational facilities available in American-sponsored schools; . . . the overseas schools assisted by the Department and AID are not in many cases the showplaces of American education envisioned by President Johnson."¹¹ He expressed the hope that they would become those showcases through the efforts of the Council.

To implement the intent of the International Education Act of 1966, legislative authority established criteria for the selection of schools eligible for assistance. Nonsectarian, nonprofit, elementary and secondary institutions founded and maintained by American groups or individuals, which enroll American, host-country, and third-country children, and which basically follow an American or binational curriculum under the direction of American or American-trained teachers,

¹⁰AASA International Newsletter, Vol. I, Winter 1969 "Secretary Rusk Calls for Better Overseas Schools," p. 1.

¹¹Ibid., p. 1.

supervisors, and administrators constitute the criteria for the basic definition of the "American-sponsored Overseas Schools." To provide the services implied in the Act, the Office of Overseas Schools, established jointly by the Department of State and the Agency for International Development in 1964, was designated to select qualified schools.¹²

The Office of Overseas Schools, Dr. Ernest N. Mannino, Director, and the staff of professional educators have done much to effect common policy and practices and to make available to overseas schools the resources of the education community of the United States. In addition to the advice, counsel, and resource services of its own world-traveling staff, the Office has been effective in the establishment of school-to-school relationships between overseas schools and educational institutions in the United States. Through the American Association of School Administrators, the Office contracted in 1968 for the School-to-School Program with emphasis at the outset ". . . placed on service to the overseas schools with the stateside schools receiving the spinn-off benefits that would accrue through the international involvement of administrators,

¹²The Mission Called O/OS, No. 021-00640 (Washington, D.C.: American Association of School Administrators, 1966), p. 37.

supervisors, and teachers."¹³ That the AASA recognized the opportunities for increased experience in international understandings while helping to reduce the isolation of American schools overseas is clearly stated in the stated objectives of the program:

1. The development of American-sponsored overseas schools as centers for providing international demonstrations of American education.
2. The development and maintenance of quality educational programs ensuring equal opportunities consistent with the requirements of elementary, secondary and higher education in the U. S.
3. The development and expansion of significant and pertinent programs of international studies in the elementary and secondary schools at home and abroad.
4. The development of community identification that will contribute to better world understanding.¹⁴

Since the organization of the School-to-School Program which was formally incorporated by the AASA under the name and structure of the Association for the Advancement of International Education (AAIE), the relationships have had varying degrees of success in the achievement of the stated objectives. Although some of the partnerships are viable and making expected progress, others have been passive and succumbed to inactivity. Speaking to the

¹³Developing School-to-School Programs. (Washington, D.C.: American Association of School Administrators, 1969), p. 16.

¹⁴Ibid.

effectiveness of the School-to-School Program in meeting the needs of the overseas partners, Dr. John Wilcox, Executive Secretary of the AAIE, stated:

School-to-School Program planning has an ad hoc characteristic. The constant turnover of superintendents and board members--especially in the overseas schools--results in a constant reinventing of the wheel. . . . Given the extreme characteristic of transiency of every individual involved with the American-sponsored overseas schools--is there a more systematic way of doing business?¹⁵

In addition to the organization of the Overseas Schools Advisory Council, and the development of the School-to-School Program, the U. S. State Department through the Office of Overseas Schools has continued to be active in a supporting role. Of particular interest is the increase in the available statistical information pertaining to overseas schools. Current data emphasize the growth and diversity of the American-sponsored schools abroad:

The American-sponsored overseas community school, generally speaking, is of relatively recent origin . . . of the 130 schools assisted in 1969, only nine were in existence prior to the outbreak of the Second World War, and only two of these were outside the Western hemisphere. Seven schools--all in Latin America--were established during the war years, and the remainder, almost 90 percent of the total, were founded after the close of the war. (It is not surprising, of course, that this should be the case, because it was not until this time that large numbers of Americans, both government employees and private citizens, began to be stationed outside the borders of the United States.) Just over 40 percent of the

¹⁵John Wilcox, AAIE Executive Secretary, Address to the Annual Meeting of the AAIE, Atlantic City, February, 1961.

schools have been established within the past decade--since 1960--and more than 15 percent within the past five years.¹⁶

Other than summarizing a history of the growth of the overseas schools, a study of the statistical data reveals a range of characteristics which defy generalization. Indicative of the lack of characterization applicable to the American-supported overseas schools is the conclusion of the 1969-70 Department of State Fact Sheet prepared for the Advisory Council:

Basic characteristics.--No statement about the American-sponsored overseas schools would apply without exception of qualification to each school. Variety is one of their basic characteristics. They range from tiny schools such as Zagreb, Yugoslavia, with 17 students and occupying three rooms, to the International Schools of Bangkok, with 3,500 students occupying large, modern buildings on two campuses.¹⁷

The single characteristic common to all is conformance with the intent of the International Education Act which qualifies the school in terms of the Act. All schools seek to serve the dual purpose of pragmatically providing for the education of American children abroad and of philosophically strengthening the understanding between the people of the United States and the peoples of other countries.

¹⁶Luebke, op. cit., p. 9.

¹⁷U. S., Congress, House Committee on Education and Labor, Education of Dependents Overseas by the Department of Defense and Independent American Schools, 91st Congress, 2nd session, June 1970, p. 21.

The Eastern European Schools

The seven schools in the Eastern European countries qualify as American-sponsored overseas schools and receive aid and assistance through the Office of Overseas Schools. Typical of the schools scattered about the globe, the seven vary in size, facilities, and program; however, their proximity and similarity of conditions under which they exist provide some characteristics in common. To note that the large majority of enrollments in the Eastern European schools is made up of U. S. government personnel is an obvious factor of similarity. In spite of the difficult conditions which can even interfere with adoption of a name for an informal association, the seven schools are more alike than different in crises as well as curriculum.

In 1965-66, the first school year for which the Office of Overseas Schools collected statistics, the seven schools in Eastern Europe reflected a certain uniformity in both grade range and enrollment as shown in the following Table 1.

TABLE 1.
 AMERICAN-SUPPORTED SCHOOLS, EASTERN EUROPE
 ENROLLMENT BY GRADE LEVEL, 1965-66¹⁸

School Location	Grades	Enrollment
Prague	K-7	97
Warsaw	K-6	79
Moscow	K-8	150
Bucharest	1-6	33
Sofia	K-6	30
Belgrade	K-8	180
Zagreb	1-8	24

In addition, an Office analysis of the individual school reports demonstrates expected consistency among the seven schools in six characteristics:

The administrators and most of the teachers were Americans or American-trained, with a large proportion of staff hired locally from among American dependent wives and qualified local personnel.

There is rapid turnover of personnel in nearly all schools, which tends to weaken stability and continuity in the school program.

The student body is constantly changing, thus further emphasizing instability.

Distance from the United States makes it difficult, time-consuming, and costly for schools to obtain instructional materials and to keep abreast of developments in American education.

Lack of funds and, in many instances, difficult living conditions make recruitment and retention of professional personnel from the United States difficult.

Small enrollments in the schools make it most difficult and costly for schools to offer comprehensive school programs, and isolation from other American-

¹⁸Luebke, Op. cit., p. 15.

sponsored schools almost precludes consolidation or cooperation in employing supervisors and specialists.¹⁹

Subsequent reports have shown little departure from the first reports by the Office of Overseas Schools; kindergarten and grades seven and eight are added and dropped (remarkably consistent, suggest one experienced head, with the grade-levels and ages of the United States Ambassador's children), and enrollments have varied slightly, but the characteristics of community transiency and program discontinuity have remained constant. Mr. Jerry Milious, Headmaster of the Anglo-American School in Sofia, underscored the lack of stability of the community and its school while recommending a more flexible school year:

A large percentage of our students do not enter school in September and leave in June. In my five years in Europe, I have observed that over fifty percent of the students arrive and leave sometime during a "tour of duty" with other than September-June beginning and ending. A great number of families have to schedule homeleave which does not coincide with the traditional long summer break.²⁰

Recognizing that the community instability is the combined results of the transiency of parents, board members, pupils, teachers, and administrators on two-year assignments and some pack after the first few months, it may be commendable that the schools exist. At the 1970

¹⁹Ibid., p. 12.

²⁰Jerry Milious, "The Year-Round School," ECIS Bulletin, Vol. II No. 2, March 15, 1971 (1885 Chesleres-Villars, Switzerland).

Vienna meeting, eight school heads, including the Vienna principal, were present; four were in a first year of service; two in the second year; and one, Mr. Herman Schwartzrock, Polish speaking head of the American school in Warsaw, was "grand old man" in honor of his third year of Eastern European service. Only four, not including Mr. Schwartzrock who felt he had served his time, were planning to return for another year. It is significant that the only participant in the meeting enjoying a fourth year was the head of the Vienna school located outside the Iron Curtain. The limited tenure of the heads is relevant to the purpose of this study. Lack of continuity and the implications for staffing, programming, and purchasing is the characteristic most common to the seven American-supported schools in Eastern Europe. Considering that common lack of continuity in terms of ramifications for the schools which are to be "showcases of excellence in education," one wonders with Dr. Wilcox ". . . is there a more systematic way of doing business?"²¹

Statement of the Problem

The problem treated in this study was to develop a process guide to facilitate the cooperative and continuous administration of seven American-supported elementary schools in Eastern European countries with components for (1) effective faculty recruitment, orientation, in-service training, and evaluation; (2) efficient management of

²¹Wilcox, Op.cit.

educational supplies, materials, and resources; (3) accountable use of government grants and other funds; and (4) responsible provision of auxiliary services.

Purpose of the Study

The purpose of this study was to develop a conceptual model for the planning and management of the seven American-sponsored schools in Eastern Europe. The model should provide the basis for the development of a process guide to facilitate the cooperative administration of the seven American-supported schools in Eastern Europe. Special consideration was given to the need for (1) administrative continuity, (2) provision of staff stability, (3) efficient utilization of educational materials, (4) planning for meaningful curriculum, (5) effective use of resources, (6) functional management of auxiliary services, and (7) a continuous educational process.

The conceptual model illustrates a functional organizational pattern that is workable and flexible and incorporates the principles of good management essential to the successful administration of schools in Eastern Europe. Specific emphasis was placed upon continuity within the design of the model to assure provision for functional responsibilities despite anticipated and frequent changes of personnel.

Significance of the Study

The study could improve the educational programs of the seven American-supported schools in the Eastern European countries, provide an operational base for the establishment of other schools required in Eastern Europe, and serve as a model for the cooperative administration of other schools of geographic proximity in all parts of the developing world.

It is evident that American schools accompany American businessmen and their families in business around the world, and there is no indication that the post-war international business expansion nor the need for American-sponsored overseas schools will end. The American Challenge attracted attention on both sides of the Atlantic as a description of the American industrial invasion of Europe, and author Servan-Schreiber views the challenge as epidemic and future oriented:

During the next few years American investment in Europe will continue to grow far more rapidly than European investment. Its profits are already half again as large as ours. It is assuming the major role in strategic areas of investment.²²

Whether the third industrial power in the world, after America and Russia, becomes American industry in Europe is marvelous material for a best-selling book; of interest to American educators is the ramification for the future

²²Jean Jacques Servan-Schreiber, The American Challenge (New York: Bantam Books, Inc., 1969), p. 29.

expansion of American-supported overseas schools as
". . . American industry spills across the world. . . ."23

The Washington-Moscow flights inaugurated in 1970, the Intercontinental Hotel splitting the skyline of Bucharest, and the red-tapeless border crossing for Americans into Yugoslavia are only a few of the hints that Eastern Europe is increasing in accessibility to Americans and American business. The increasing enrollments of the seven existing schools in Eastern Europe bear witness to the expansion of American industry within Iron Curtain countries, and as business opportunities are permitted beyond the capitol cities, Americans who ". . . carry their most important institutions with them" are establishing new schools in Eastern Europe.

Already planned and soon to be founded in Nagykanizsa, Hungary is a small American school for twelve children, dependents of the employees of the Corning Glass Company. The need for experienced support-assistance for the provision of educational opportunities is evidenced in a September, 1971 press release issued jointly by Mr. Robert Ecklin, Project Manager for Corning Glass, and Mr. Walter Haworth, principal of the American International School, Vienna, hereinafter referred to as AIS:

The Corning Glass Company is one of many U. S. corporations currently involved in selling technology to developing countries. Corning is supervising the training of Hungarian workers and construction of a

²³Ibid., p. Foreword.

light bulb factory in Nagykanizsa, Hungary. Nagykanizsa is a small city of 39,000 inhabitants with no international schools within three hours' driving distance.

The American International School, Vienna has agreed to staff and supervise a small twelve student, tutorial school for the twenty-month period while the plant is under construction.

Before approaching AIS, Vienna, Project Director Robert L. Ecklin researched the literature and found no examples of working models to adapt to their Hungarian experience. . . . Due to the relative cultural and physical isolation of the fifteen U. S. families in a remote part of Hungary, Corning officials enlisted the aid of AIS, Vienna in developing guidelines for on-site educational opportunities:

1. An American teaching couple to be employed. . . .
7. AIS, Vienna should offer team supervision, assistance with ordering and lending instructional equipment, orientation for overseas work, fiscal advice and use of instructional services and contracts; and
8. The couple should periodically visit AIS, Vienna for consultation, review, planning and professional assistance.²⁴

The experience of Corning Glass developing a plant for the Hungarian government in Nagykanizsa and the dependence upon an established international school to provide the expertise for a terminal, dependent-children, educational program is the significance of this study.

The political climate of the Eastern European countries and that of most of the developing world precludes the invasion of permanently established American or western world business interests. The future international

²⁴News Release, American International School, Vienna, Austria, September, 1971.

expansion of American industry is implied in the Corning Glass Hungarian project: the selling of technology and the employment of temporary, on-site advisory teams. The commitment of the post-industrial society will be the provision of technology to the underdeveloped nations of the world, and the process will involve terminal organizations, task forces and the adhococracy of Alvin Toffler:

The organizational geography of super-industrial society can be expected to become increasingly kinetic, filled with turbulence and change. The more rapidly the environment changes, the shorter the life span of organizational forms. In administrative structure . . . we are moving to temporary forms, from permanence to transience. We are moving from bureaucracy to adhococracy.²⁵

The significance for overseas educators will be found in similar structures of adhococracy. As American business challenges the world in post-industrial period, American dependent children accompanying their fathers to remote areas of Eastern Europe--and Africa, Asia and the rest of the developing world--will be seeking education in American schools abroad. The schools, like the terminal business task forces they support, will be better organized and managed to pursue their purposes as adjunct components of a viable administrative system.

²⁵Alvin Toffler, Future Shock (New York: Bantam Books, Inc., 1971), p. 408.

Procedures

This study used the following procedures:

1. Basic research was conducted by reviewing the existing literature and interviewing administrative personnel of Eastern European schools relevant to the growth and needs of American-supported overseas schools and their support systems. General attention was given to the publications of the U. S. Office of Overseas Schools and other international organizations. Specific examination was made of the records and working papers of the organizational meetings of the seven American schools in Eastern Europe.
2. The available literature was analyzed to determine categories of information requirements for the Eastern European American-supported overseas schools. These categories will serve the development of a management information system at a later time and as need dictates.
3. A general planning model was conceptualized for the cooperative administration of the seven American-supported elementary schools in Eastern Europe.
4. An implementation plan to be used by schools in Eastern Europe or adapted to use by other American-supported overseas schools of geographical proximity is implied in the design.
5. A verification of the model and components was conducted through on-site discussions with Eastern European

American-supported school directors and further discussions with United States Department of State and other concerned officials.

Organization of the Study

This study is organized in the following manner:

Chapter I reviews material concerning the statement of the problem and purpose, significance, procedures, organization, limitations, and definitions of the study.

Chapter II consists of a review of the working papers of the Eastern European school representatives in attempts to organize toward improved cooperative management services.

Chapter III contains the research and theoretical considerations necessary to a model for cooperative administration.

Chapter IV illustrates the conceptualization of models for the management information system and administrative system.

Chapter V includes the conclusions, implications and recommendations resulting from the study.

Limitations of the Study

This study did not attempt to outline procedures for the operational acceptance of the model by the governing boards of the seven Eastern European schools. The independent authority under which each of the American-supported overseas schools is governed precludes prediction of the sovereign behavior of the boards.

The inherent independence of the overseas schools underscores the unique concept of the study which is directed toward cooperative action.

Definition of Terms

The following terms were used frequently throughout the study. The definitions are given in order to provide the reader with specific meanings.

1. American-supported overseas schools.--Of necessity, the definition of the term is furnished in detail in Chapter I. The seven schools in Eastern Europe are by definition American-supported overseas schools, but for purposes of brevity may not always be so described.

2. School Head.--A title assigned the position offering administrative leadership in an overseas school. It is an all-encompassing term synonymously used for the several titles--superintendent, director, principal, headmaster--common in overseas schools.

3. Regional Officer.--An educator assigned to the staff of the Office of Overseas Schools, United States Department of State, and responsible for servicing of schools in a defined geographical area of the world.

4. Model.--A schematic representation of the relationships of component parts under study.

5. Systems Analysis.--A technique which can be employed to provide a pictorial representation of a complex system.²⁶

6. Data Base (or data bank).--An accumulation of data elements.

7. Management Information Systems (MIS).--A design which integrates the dynamic functions of an organization, such as instructions, personnel, finance, and provides, where required, computer-aided systems of information control for administrators; it may be a reporting system or a decision-making system, depending on level of application.²⁷

8. Planning.--The formulation of rationally feasible courses of action through a systematic consideration of alternatives.²⁸

²⁶Carol Vaughan, "A Systems Analysis of the Registration Procedures of Mankato State College, 1968-1969 (unpublished Masters Thesis, Mankato State College, Mankato, Minnesota, 1969), p. 9.

²⁷Harry J. Hartley, Educational-Planning-Programming-Budgeting (Englewood Cliffs, New Jersey: Prentice Hall, Inc., 1969), p. 255.

²⁸Ibid., p. 256.

CHAPTER II

BACKGROUND DOCUMENTATION

Plans to organize overseas schools toward the improved effectiveness of common services is not new; implementation of the plans is lagging. The isolation of many American-sponsored overseas schools has encouraged heads to develop relationships with neighboring schools, and the occasional meetings have corroborated the commonality of needs of schools in proximity.

Burton Fox, Superintendent of Colegio Karl C. Parrish in Barranquilla, Colombia, recognizes the needs of overseas schools and the possibility of a central source of assistance in a dissertation recommendation for an overseas accrediting agency:

General Recommendation

The need for assistance in consultation, workshops, and recruiting is apparent worldwide. The accrediting agencies can play a key role in these areas without great additional expense.

Assistance in recruiting can be handled jointly with the various Regional Associations or through such activities as the newly formed Inter-Regional Center for Curriculum and Materials Development in Barranquilla, Colombia. Possibly limited office space and secretarial facilities could be made

available by the accrediting associations for overseas administrators recruiting in the United States.¹

The schools of East Asia, during a 1971 regional meeting recommended a form of mutually-shared in-service training programs:

The subject of in-service training for EARCOS schools was advanced in several groups meeting. . . . There is a need for more communication between the larger schools and the smaller schools, and in particular, with those schools which are not allowed to receive money from the Office of Overseas Schools. schools in EARCOS have many resources available on thier respective staffs, people with special training or special strengths in certain areas. If these could be identified, teachers could share their experiences through a teacher exchange for short-time blocks during the regular school year. This would be less costly than bringing consultants from the United States. EARCOS could serve as a clearing house for people classified as outstanding in their fields.²

Groups of schools in Europe have joined together albeit in loosely organized cooperatives to discuss problems in common. The association of schools in the Netherlands sponsors an annual teacher conference introduced in 1970, the Italian complex of schools places its emphasis upon assistance to the smaller members from the

¹Burton Bruce Fox, "The Question of Accreditation Overseas: A Comparative Study of Accredited and Non-Accredited Schools in Latin American," (an unpublished doctoral dissertation, University of Alabama, University, Alabama, 1969).

²"EARCOS Conference Report," EARCOS Newsletter, Vol. 2., No. 2, Feb. 1971 (An official publication of the East Asia Regional Council of Overseas Schools, Box 28, APO San Francisco, 96263), p. 4.

large Overseas School of Rome, and the Iberian association of schools is active but primarily confined to correspondence. In brief, the groupings of American-sponsored schools in Europe are less examples of organizations of purpose than collective expressions of need.

Perhaps the most progressive of the movements toward organization of overseas schools is the Regional Superintendency in Colombia and Haiti described by Paul Orr and Robert Seaquist:

The Regional Superintendency was created in July 1967, to provide administrative continuity for a group of overseas schools. . . . All of the schools are located in the Republic of Colombia.

The regional superintendent serves as a consultant and activist in personnel recruitment, budgeting, international purchasing, and creating new educational projects. Each school and its respective school board retains its autonomy. The project is the first of its kind among the 118 American Sponsored Schools overseas.³

That it is the "first of its kind" and remains the only of its kind dramatizes the lack of progress toward meaningful association among American sponsored schools overseas. Yet the regional superintendency is envisioned to serve greater interests. Seaquist, in a study to develop a planning base for overseas schools in Colombia, hypothesized and confirms in his research:

³Paul G. Orr, and Robert G. Seaquist, The Bilingual Schools: A Planning Base for Schools in Colombia and Haiti (University, Alabama: Bureau of Educational Research, College of Education, 1968), Introduction.

The schools have:

- No data base for long-range planning.
- No data for comparative studies.
- No real cooperative planning or efforts.
- No concerted efforts for self-improvement.
- No apparent interest in helping each other.

The study has confirmed the belief, and the statements can be accepted.⁴

Sequist's study recognizes the common needs of the Colombian schools and recommends development of a collective planning base for greater sophistication in problem solving. Whatever the reasons for the lack of "concerted efforts for self-improvement" or "in helping each other," the study researches and establishes the advantage of a data base for long-range planning, comparative studies and cooperative planning efforts for the association of Colombian schools. Sequist recommends the conclusions of his study for groups of schools other than those within the limits of his research:

American sponsored schools are located in many of the free-world countries, and there are even a few located behind the Iron Curtain. It can be assumed that all of the overseas schools have much in common. This is generally true of the schools within a single continent; it is especially true of the schools within one country.⁵

⁴Robert G. Sequist, "A study to develop a Planning Base for the Association of Colombian-American Bilingual Schools (an unpublished doctoral dissertation, University of Alabama, University, Alabama, 1968), p. 226.

⁵Ibid., pp. 225-226.

Organizing American-supported overseas schools toward more effective administrative services is not unique, and the idea appears wherever groups of such schools are in proximity. During the AAIE 1971 spring conference, one session was devoted to a discussion of the practicality of regional service centers and the purposes they might serve. Although the participants represented locations covering the globe, the idea was neither new nor lacking in active support:

Table leaders were from Guatemala, Iran, Japan, Italy, Israel, Mexico, Greece, Germany, and Haiti.

. . . there was almost unanimous opinion that the development of regional service centers was an essential next step. Of course, it was noted that overseas schools have many cluster patterns and therefore should have careful planning. Likewise political, cultural and transportation are factors to be considered when establishing a center. To a limited degree some regional operations are already underway, but the big job lies ahead.

Considerable time was spent discussing the services such a center could provide. Among them were (1) upgrading curriculum (2) the organization could serve as a clearing house for personnel (3) it could perform unusual services as a purchasing and materials center. For example, Vienna might be a center for materials to go to schools in the following countries: Yugoslavia, Hungary, Romania, Bulgaria, Czechoslovakia, Poland and Russia (4) the center might well direct and stimulate experimentation and research for the region. Likewise, it might well serve the region on computer and test scoring matters. (5) Communications could emanate from the center. Newsletters, bulletins, data sheets and the like are examples.⁶

The concept of an organization of American-supported schools in Eastern Europe is not new. It is a

⁶AASA International Newsletter, Vol. III, Fall 1971, "AAIE Conference," p. 9.

re-occurring idea which first appeared as a rational solution to meet the needs of the schools in a proposal by Dr. Stanley W. Krouse, Jr., Regional Educational Officer, Office of Overseas Schools, U. S. Department of State. Dr. Krouse, in a spring 1967 letter circulated among the AIS, Vienna and seven Eastern European schools and with a copy to Dr. John Wilcox, Associate Executive Secretary, American Association of School Administrators, favored a more organized approach to the common problems of the schools. Krouse recommended a ". . . fall Eastern European Complex meeting at which time the details and logistics of this program, if in fact the Eastern European schools feel they would benefit from this program, would be worked out."⁷ Prior to issuing the invitation to the A/OS financed meeting, Dr. Krouse visited the seven schools and discussed with the heads school problems and suggestions for improved conditions. An ephemeral complex is a result.

Included in the Krouse proposal was the increased use of school-to-school partnerships, a pairing of schools involving stateside educational institutions sponsored by the AASA. It was a Krouse suggestion that such pairings among the schools in Eastern Europe be mutually available and serve as a collective resource center available to the complex rather than to individual schools. Thus the copy

⁷Appendix A, p. 123.

of correspondence to Dr. John Wilcox, Associate Executive Secretary of the AASA sponsored Association for the Advancement of International Education.

Dr. Krouse identifies seven areas of mutual assistance:

There would be seven ways in which you would be able to serve the schools in Eastern Europe.

1. Assist in recruitment and staffing.
2. Assist in curriculum research and development.
3. Assist in business management including purchasing.
4. Assist in planning of educational facilities.
5. Assist in the provision of academic services such as consulting in the areas of math, science, etc.
6. Assist in providing materials of instruction such as transparencies, filmstrips, etc.
7. Assist in the area of pupil personnel services such as the provision of elementary-secondary guidance service, psychological service, speech therapy, etc.⁸

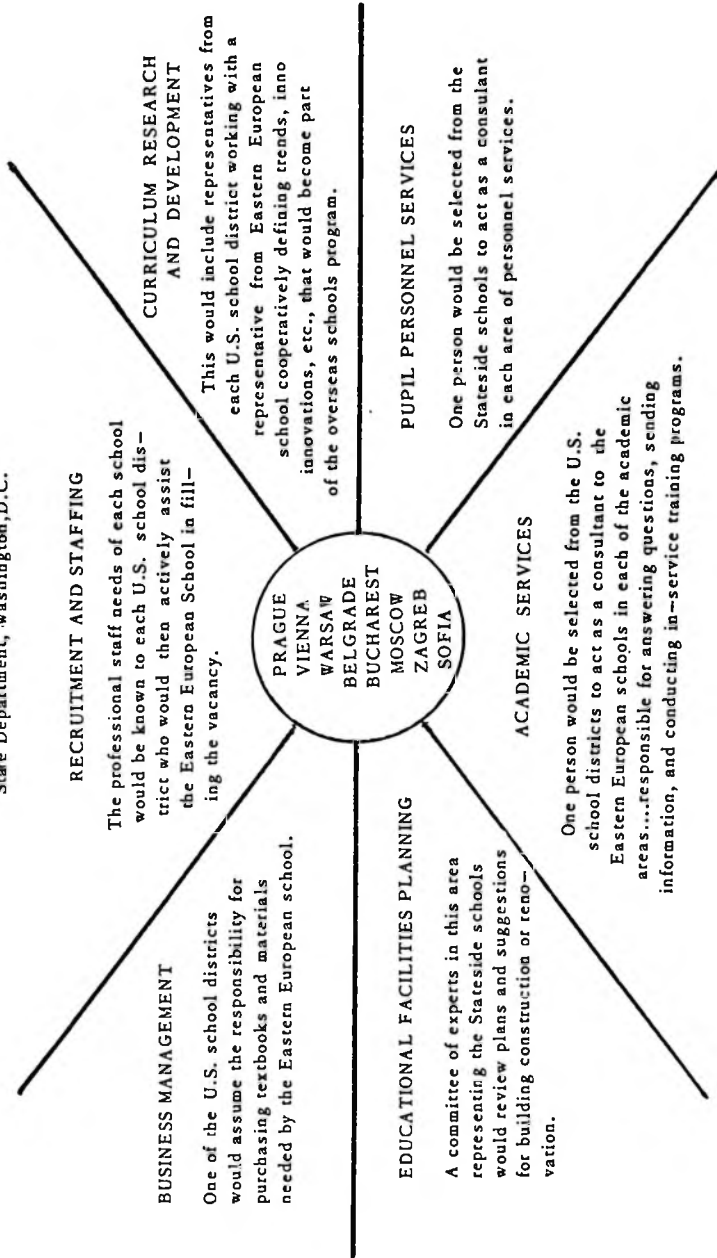
To illustrate a plan for increased resource aid and improved coordination, Dr. Krouse includes a diagram (Fig. 1) ". . . to show how the expertise from each school in the school-to-school program would be utilized."⁹ It is evident that he recognizes the needs of the schools and, that he sees cooperative action as a partial solution to the needs.

The meeting proposed was held in the spring of 1968. The resignation from A/OS by Dr. Krouse, who originated the purpose of the meeting, caused some delay in the planning. The March meeting of 1968 in Vienna included seven school heads and eight Board members from the Eastern

⁸Ibid., p. 124. ⁹Ibid., p. 124.

FIGURE 1
UTILIZATION OF SCHOOL-TO-SCHOOL PROGRAM, O/O5, MAY, 1967

Dr. Stanley Krouse
 Regional Officer, Europe
 Office of Overseas School
 State Department, Washington, D.C.



European and host schools. In the absence of Dr. Krouse, Mr. Richard Johnson, Sofia board member, acted as rapporteur. His training as an American diplomat aided him in his notetaking and contributed to a concise and detailed record of the discussions, and the record served as precedent for recording of future meetings. Indicative of the common needs of the schools are the "subjects discussed" recorded by Mr. Johnson:

- a. Sharing information and experience among schools in Eastern Europe.
- b. The advantages of establishing a regional association of Eastern European American International Schools, and of incorporation and insurance on a joint basis.
- c. The establishment of a regional support operation in Vienna to assist American international schools in Eastern Europe.
- d. The need by posts in Eastern Europe for a secondary school boarding facility in Vienna.
- e. American experience in centralized support for local school operations, especially with respect to plant and equipment and materials procurement.
- f. Trends in American elementary school education, and in social studies at the elementary level.¹⁰

The recorded recommendations of the meeting clearly reflect the consensus favoring a regional association with capabilities for the storage and sharing of information assistance and services:

Recommendations: The representatives present unanimously recommend establishing an Eastern European regional association or complex, and a related regional support operation for information exchange, guidance, and assistance in material procurement, storage, and sharing. In the case of most schools, the recommendation is subject to a referendum confirmation by higher authority in the school boards concerned.

¹⁰Ibid., p. 125.

The representatives present generally favor the concept of incorporation as an Eastern European regional complex or association of American international schools and the working out of insurance coverage on a joint basis.¹¹

The serious intent of the group is represented in the depth of the discussions which define objectives of organization:

Objectives: After discussing similarities and differences in the needs of the different schools in Eastern Europe, it was agreed that appropriate initial objectives for a regionally-centralized approach should include the following:

- a. To reduce duplication of efforts among the individual schools.
- b. To ensure a mutually-advantageous sharing of information and experience among participating schools.
- c. To provide professional counseling and guidance, on the basis of direct, and frequent contact with American international schools in Eastern Europe and their particular problems.
- d. To assist with, and where appropriate, to centralize contacts between the schools and organizations in Western Europe and the United States, including the Office of Overseas Schools (O/OS), the International Schools Services (ISS), the European Council of International Schools (ECIS), and American educational institutions interested in school-to-school arrangements with American international schools in Eastern Europe.¹²

The working papers record that the participants favored Vienna as a location of the resource center, and the rationale (Appendix A, March 26, 1968 Working Papers) of the decision, while not essential to this study, imply the very conditions urging cooperative administration of the schools.

¹¹Ibid., p. 125. ¹²Ibid., p.126 .

The minutes conclude that the responsibility for further action would be left to the A/OS, and the decision underscores the major problem of instability and is the explanation of the subsequent lack of progress:

The participants believe that leadership in establishing an Eastern European complex or association and an Eastern European regional support operations at Vienna should be exercised by O/OS rather than by the Eastern European schools themselves, chiefly because of the constant turnover in administrative and board personnel in Eastern Europe, and the consequent inability of Eastern European representatives to follow through as individuals. The participants will now look to O/OS for analysis of and comments on the results of the Vienna meeting.¹³

Dr. Gordon Parsons, Regional Officer of the Middle East and Southeast Asia, was given the additional responsibility of Europe as replacement for Dr. Krouse during the late fall of 1967, and an objective of his first visit to schools in Europe was to ". . . assist independent, community-run American-sponsored schools abroad in becoming fully self-sufficient, viable educational institutions."¹⁴ Parson's 1968 European itinerary coincided in time with the Vienna fall conference of the European Council of International Schools. At Parsons' recommendation and with A/OS funding a meeting of the Eastern European school heads and board members was scheduled immediately preceding the conference. Conference speakers Dr. Finis Englemen, Dr. Edward Rushton and Dr. John Wilcox, all representing the AASA/AAIE, arrived early and attended the meeting of

¹³Ibid., p. 126. ¹⁴Ibid., p. 129.

the Eastern European schools to provide organizational and resource information regarding the School-to-School program. Six administrators representing the School-to-School stateside partner-institutions were in attendance to describe the availability of services from their systems.¹⁵ The selection of participants and agenda items emphasized an attempt to improve the school programs through the resources and continuity of the School-to-School relationships.¹⁶

¹⁵Ibid., p. .

¹⁶Note: An interesting immediate result of the meeting was the decision by participant Dr. Rudolf Fobert, Superintendent, Lexington, Massachusetts, Public Schools to include Warsaw and Moscow in the Lexington brochure for teacher recruitment:

Enjoy Teaching in Lexington Massachusetts--"Are You Interested in Overseas Teaching?" February, 1969.

The Lexington Public School System has a school-to-school relationship with two overseas American schools, one in Warsaw and one in Moscow. We cooperate with them in a number of ways; one which is in recruiting of staff. The Anglo-American School in Moscow, USSR, is a K-8 school with a faculty presently made up of a Principal, four American, four British and three Russian teachers. The school enrollment averages 170 students with approximately 20 nations represented.

The American School of Warsaw, Poland, is a K-8 school with an enrollment of 120 pupils with about 40 percent of them from the U. S. The other children attending are from Third Party Nationals whose parents are affiliated with other National embassies.

Teaching procedures and curriculum are generally those prevailing in the United States.

Mrs. JoAnn Clayton, board member from Sofia, acted as secretary to the proceedings and the "Subjects Discussed," as listed and reviewed in the minutes, reflect the unchanging concerns of the school heads. All five of the topics underscore the need and willingness of the schools to share information, and the second of the five re-introduces a continuing theme:

2. Establishment of a regional support office in Vienna. Need for a centralized service center varies greatly from post-to-post. O/OS has no funds available to provide even a minimum staff of one professional this year and no action will be taken by the group at this time. Emerging School-to-School relationships are filling many needs which were expressed at the spring meeting.¹⁷

It is evident that a regional support office for the provision of administrative services remained a priority among the school heads; lack of funding--or at least the inability to foresee the development of a center without positive direction from an outside agency--forced the focus of attention upon alternatives to the further planning of a centralized administrative unit.

Although there was agreement that the School-to-School relationships were fulfilling some of the needs of the schools, the minutes suggest a preoccupation of the school heads with local problems. The participating school heads and board members agreed to some cooperative action in a persistent effort to resolve mutual problems. The

¹⁷Ibid., p. 133.

continued attempt to share administrative procedures is recorded in a suggested "Follow-up":

1. Mr. Bruce's office will prepare a standardized form for the exchange of information from post-to-post regarding applicants for all school positions. The exchange of information will begin in mid-November.
2. All schools should send copies of their policy guidelines, charters and by-laws to Dr. Parsons' office where they will be duplicated and distributed to all posts.
3. The Vienna school board will make available their recently revised policy guidelines.
4. Mr. Bruce's office will compile and distribute information about salaries and teacher benefits. A standardized student record form is also available from his office.¹⁸

The frequent mention of the AIS, Vienna as a source and disseminator of information implies a recognition of the stability of the host school. In the self-seeking search for assistance, the school heads of Eastern Europe knew the transiency of their own positions precluded them from accepting the responsibility of future-decision activity.

The single recommendation concluded at the meeting emphasizes the priority given to the exchange of ideas, the need for resource help and continuous, mutual assistance.

Recommendations:

The representatives of the Eastern European Schools recognize the need to continue the exchange of ideas and information between the schools, as well as with specialists from the U. S., and recommend a third meeting be held in March or April, 1969. The participants intend to evaluate this year's developments and make plans for the 1969-70 school year.

¹⁸Ibid., p. 135.

The representatives further recommend that these conferences be held on a regular basis in the future.¹⁹

Although a copy of the minutes was forwarded to all participants and to the Office of Overseas Schools, there is no evidence of implementation or further discussion. It is evident that the impasse of previous meetings was yet a deterrent to meaningful organization; the autonomy of the individual schools prohibited the outside direction they sought.

The Office of Overseas Schools is interested in any self-help, cooperative developments among American-supported overseas schools and offers encouragement and counsel to such activity. The State Department Airgram announcing Dr. Parsons' 1969 fall European itinerary underscores the A/OS interest in cooperative effort in the description of purpose of the Regional Officer's school visits:

Specifically, he will wish to discuss . . . (b) development plans and needs for purposes of planning future assistance of the schools, (c) problems of staff recruitment, support, and in-service education, (d) current programs in language and area studies and other intercultural aspects of the schools activities with the view toward development of increased effectiveness in this sphere, (e) cooperation among schools at various posts in the utilization of the services of regional curriculum specialists, (f) evaluation of previous grant implementation, and. . .²⁰

The phrases "for purposes of planning," "problems of staff," "development of increased effectiveness," "cooperation

¹⁹Ibid., p. 135. ²⁰Ibid., p. 136.

among schools," and "evaluation of previous grant implementation" are ironically redundant of the needs defined but unachieved by the Eastern European school heads and board members.

A formal meeting of the Eastern European schools was not held during the spring of 1969. There is some suggestion that lack of progress was a factor; and, of course, spring is not an attractive planning time for a school head packing for departure. A memorandum to all school heads from Mr. Herman Schwartzrock, the experienced head from the Warsaw school, reiterates the inherent nature of the common problem:

At the present time it appears that there will be no separate spring conference for the E.E.S. This seems most unfortunate. . . . We all agree that E.E.S. have many similar problems: problems that are unique because we are in Eastern Europe. It is this situation which sets us apart from the Western Europe Schools. In order for our complex to remain somewhat together . . . those E.E.S. administrators who attend the spring (ECIS) conference at The Hague could spend at least a few hours together . . . we could at least keep the complex going.²¹

The next formal meeting of the Eastern European Schools was planned for November, 1969, in Vienna. The Office of Overseas Schools assisted in funding the attendance of the heads and board members, and Regional Officer Dr. Parsons participated as an official representative of the Office. Dr. Martin Essex, Past President of the AASA,

²¹personal correspondence, Herman Schwartzrock to heads of Eastern European American-supported elementary schools, April, 1969.

attended and was one of several visiting educators who discussed with the group issues of educational interest. The agenda, however, is indicative of the participants' definition of a felt-need objective: "Planning Discussion for Regional Materials and Resource Center" is included twice as an agenda item.

Mr. William Duffey, Academic Dean at the host school, served as secretary and the minutes are concise in report of the proceedings. Recorded faithfully is the attempt of the speakers to break the isolation of the participants from behind the Iron Curtain through the introduction of peripheral topics. The single-mindedness and persistence of the Eastern European heads and board members is reflected in the two concluding recommendations:

1. That an orientation handbook for new board members be published. . . .
2. That the schools represented at this meeting legally incorporate themselves into an Eastern European Schools Association and that a related regional support operation for information exchange, guidance and assistance in procurement, storage, and sharing of instructional materials be established.²²

The minutes also record a "Follow-up" encouraging the heads to exchange information regarding salary, curriculum guides, school descriptions, teaching English as a second language, teacher orientation, teacher applications and school calendars.²³

²²Appendix A., p. 144.

²³Ibid., p. 136.

The final to-date meeting of the Eastern European Schools was planned for Vienna in November, 1970. Although the advance notice of the meeting from Mr. Schwartzrock to the heads of the schools mentioned A/OS interest in the attendance of board members, there is no indication that any attended. The one-page agenda mailed to the heads lists only the heads of schools as participants, and the apparent disinterest of the board members and the omission of outside speakers and resource people may be pertinent. The earlier appeal of Mr. Schwartzrock to ". . . at least keep the complex going. . . ." and the limited participation implied in the agenda suggest an attitude of resignation to the lack of progress of the four years. Although no minutes were kept during the meeting (a four-year first which hints of frustration), the items of the agenda outline a program limited to the involvement of the heads of the schools and are singularly devoted to discussion of a materials center.²⁴

Significant to this study is the two-page discussion outline appended to the agenda entitled: "Question: To be considered in discussing the formulation on an instructional materials center for Eastern European Schools." The outline and the sub-headings location, transportation, coordination and communication, time factor, primary objectives, types of materials and financing are a culmination of four years of discussion

²⁴Ibid., p. 147.

among an ever changing group of school heads and board members who independently and collectively continue to arrive at the same definition of need and solution.

A study of the outline reveals a concern with two major issues, need and solution; and the number and emphasis of the outline-topics suggest a preoccupation with the solution. The outline presumes a resource center located in Vienna and offers four headings; I Location, II Transportation, III Time Factors and, IV Types of Materials at the Center, devoted to the purposes of the resource center. Two of the three subheadings in the summary, "Will the center fulfill the needs of each school?" and "Are there more practical alternatives?," express the more candid concern of the author of the outline. The final question, "Where do we go from here?" suggests an appeal to action.

Although it is not the intent of this study to determine a geographical location for a support or resource center, the topics of the outline in reference to location are pertinent. The development of a conceptual model for the planning and management of the seven schools presumes practicality and must, therefore, be concerned with the logistics of the external objectives of the system. In brief, the research into the working papers of the Eastern European Schools' meeting identifies functions essential to the effective planning and administration of the schools, and presumes a system of responsible internal management.

Summary

Heads of schools and board members of Eastern European American-supported overseas schools have met annually for four years and through discussions have arrived at a number of instructional and administrative problems of mutual concern. A review of the working papers of the meetings reveals seven areas in which similar functions can be categorized:

1. recruitment and staffing
2. curriculum development
3. pupil personnel services
4. business management
5. supplies and materials
6. facilities
7. consultant services

The identification of the seven functions results in the theoretical framework for the development of the conceptual model for the cooperative administration of the seven schools. The framework dictates two phases to the final completion of the study: 1) organization of a management information system relevant to the needs and available to the seven schools and 2) conceptualization of a system model responsible for the MIS (and other external considerations as they appear) and its own internal management.

A systems approach can integrate the several components and functions into a conceptual model, thus providing:

". . . continued exchange of ideas and information."²⁵

". . . support operation for information exchange, guidance and assistance in procurement, storage and sharing of instructional materials. . . ."26

". . . a centralized support office. . . ."27

²⁵Ibid., p. 135.

²⁶Ibid., p. 142.

²⁷Ibid., p. 125.

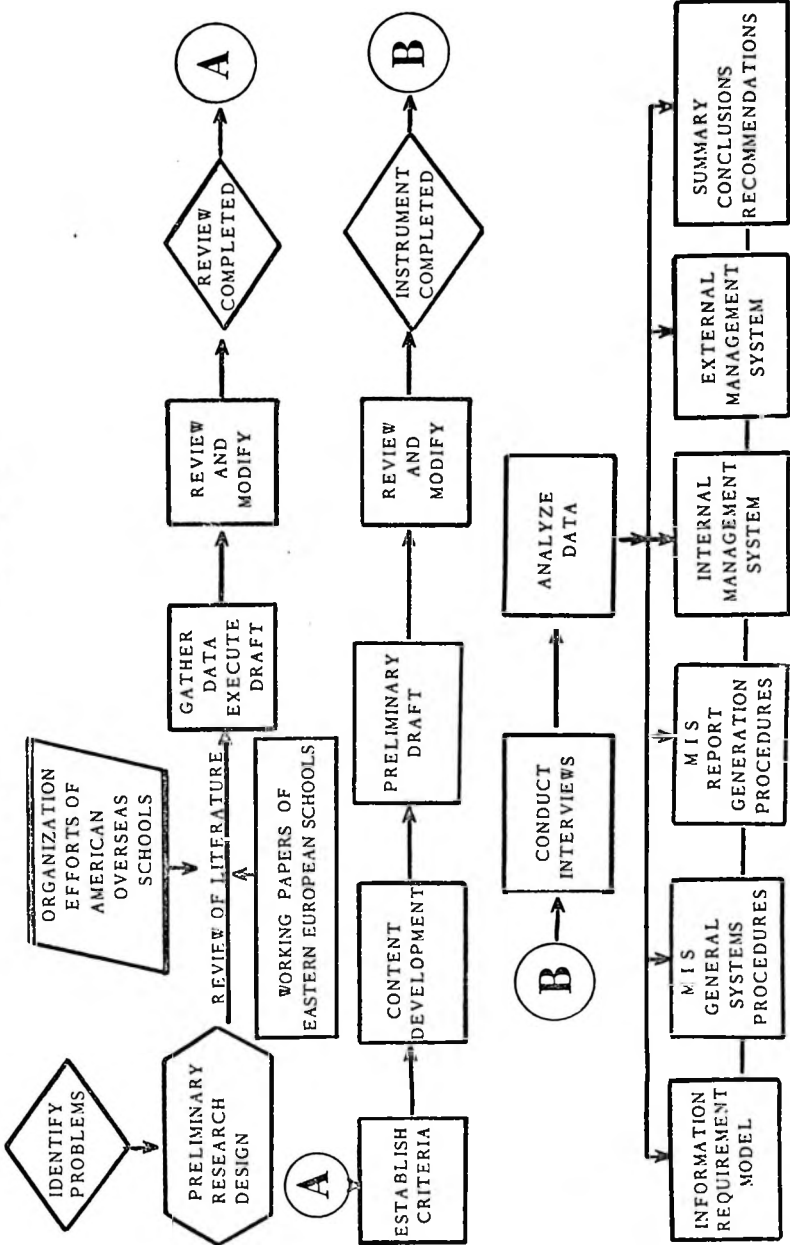
CHAPTER III
RESEARCH AND THEORY FOR THE MODELS

The research procedures for the progress of this study consisted of performing several separate functions (Fig. 2). Step one involved a review of the working papers of the meetings of the heads and Board members of the Eastern European schools, 1967-1971, and selected literature describing the organizational efforts of other geographically-grouped American-supported overseas schools. The object of the review was the generation of the theoretical considerations essential to the conceptualization of a framework for the study.

The preliminary examination of the review makes possible broad descriptions of information requirements distilled from the discussions of the participating school heads and board members responsible for decision-making in the schools. The analysis resulted in the identification of seven categories of information requirements considered crucial to the operational decisions and establishes the basic elements of a process design.

The second procedural step involved the refinement of the seven categories of information requirements in

FIGURE 2
PROCEDURES FOR THE STUDY



terms of manageable sub-units. Using the previously identified seven functional categories as a comprehensive base, an interview instrument (Appendix B) was devised for further refinement of each of the categories. Through question, answer, and discussion with the decision makers, the information requirements were refined and defined to produce the specificity of information necessary for file requirements.

The third step in the procedure was a final analysis of the data for the definition of subsystems for manageable information. The subsystems provide for the selection, collection and retrieval of data upon request and were planned for systematic expansion as new data became available. The system in its total function has the characteristics and capability of a comprehensive management information system (MIS).

The final step in the completion of the study was the development of a conceptual model for the cooperative administrative unit responsible for the coordination of the total system. The model generated provides the structural mechanism through which the information can become operational for each school administrator, and systematizes the cooperative activities of the seven schools.

Categorization of the Functional Components

The review of the working papers of the Eastern European schools reveals that the participants, the school heads and the board members, were the decision makers of the individual schools. (Churchman's cautious admonition, ". . . it is by no means obvious who the real decision makers are in the organization. . . ." and his definition ". . . decision makers refers to those people who can produce change in the organization. . . ." provide the rationale for the inclusion of both administrators and policy makers of the seven small schools as decision makers.¹⁾ It is assumed that the individuals involved in the operational decisions of the schools are knowledgeable in the definition of informational requirements of management. An analysis of the discussions provides a quantitative base of information which sub-divides into seven defined categories of data:

1. recruitment and staffing
2. curriculum development
3. pupil personnel services
4. business management
5. supplies and materials
6. facilities

¹C. West Churchman, The Systems Approach (New York: Dell Publishing Company, 1968), p. 162.

7. consultant services
8. (as need arises)

A review of the organizational efforts of other geographically-grouped American schools reveals substantiative evidence. There is sufficient indication that in other areas about the world similarly grouped schools recommend, or are moving toward, resource centers and administrative cooperation for the resolution of mutual problems. The implied needs can be identified with the defined seven categories of information.

The total review provides confidence for the assumption that the seven areas or categories of information can be used as a base for further refinement toward the definition of manageable file requirements for an operational MIS.

Determination of Information Requirements

To define and establish a framework of sufficient sophistication for an effective generation of information for management utilization, an interview instrument was designed (Appendix B). The purpose of the instrument was to provide the opportunity for unrestricted and imaginative exploration of each of the seven functional categories and to further define the file requirements for the information system.

The instrument through the formality of the questions and the informality of the discussion-answers

provided (1) confirmation of the practicality of the seven categories, (2) information for the addition of other general categories, and (3) justification of data elements. The instrument probes the following:

a. Confirmation of decision makers.

The presence of both board members and school heads during the Eastern European school meetings suggests a departure from the traditional separation of policy and decision-making. The instrument is used with both school heads and board members to minimize the omission of information as a result of misinterpretation of roles.

b. Practicality of the seven data categories.

Formal questioning attempts to reaffirm to the final development of an information system the administrative practicality of the seven categories, and to identify constraints (political, logistical, financial, and others) which might eliminate one or more of the categories from the information system.

c. Additional categories for the system.

Direct questions are posed, but the analysis of the interview results is concerned with both direct and deductive answers.

d. Utilization of data.

The data are to be evaluated in terms of management utilization--whether it provides the usable information for decision-making and educational planning.

e. Availability of the data.

The information must be available from an identified source and be accessible for collection, editing, and maintenance in the most useful and usable form.

f. Maintenance of the data.

The effort required to maintain the data element for effective utilization should not exceed the value of the data.

Upon completion of the interviews in the field, the data was analyzed for purposeful systematization.

Analysis of the Data

A final analysis of the data was performed in terms of the purposes of the study. Assuming that the seven categories of data can form the subsystems of a management information system available to the decision makers of the schools, the MIS provides (1) information for effective utilization of educational materials, (2) planning information for meaningful curriculum development, and (3) data for effective use of resources.

The development of an administrative unit with access to the MIS and capability for internal management and external coordination provides for (1) improved administrative continuity, (2) increased staff stability, (3) improved functional management of auxiliary services, and (4) a base of comprehensive information and systematic procedure for a continuous educational process.

Theorizing the Management Information System

It is evident that the development of an information system must take into consideration a number of diverse and interrelated components and functions. By using a systems approach, various components and functions

are identified and integrated to establish a theoretical framework for the general system procedures for the MIS (Fig. 3). Hartley underlines the purpose of any MIS in its service to the processes of management:

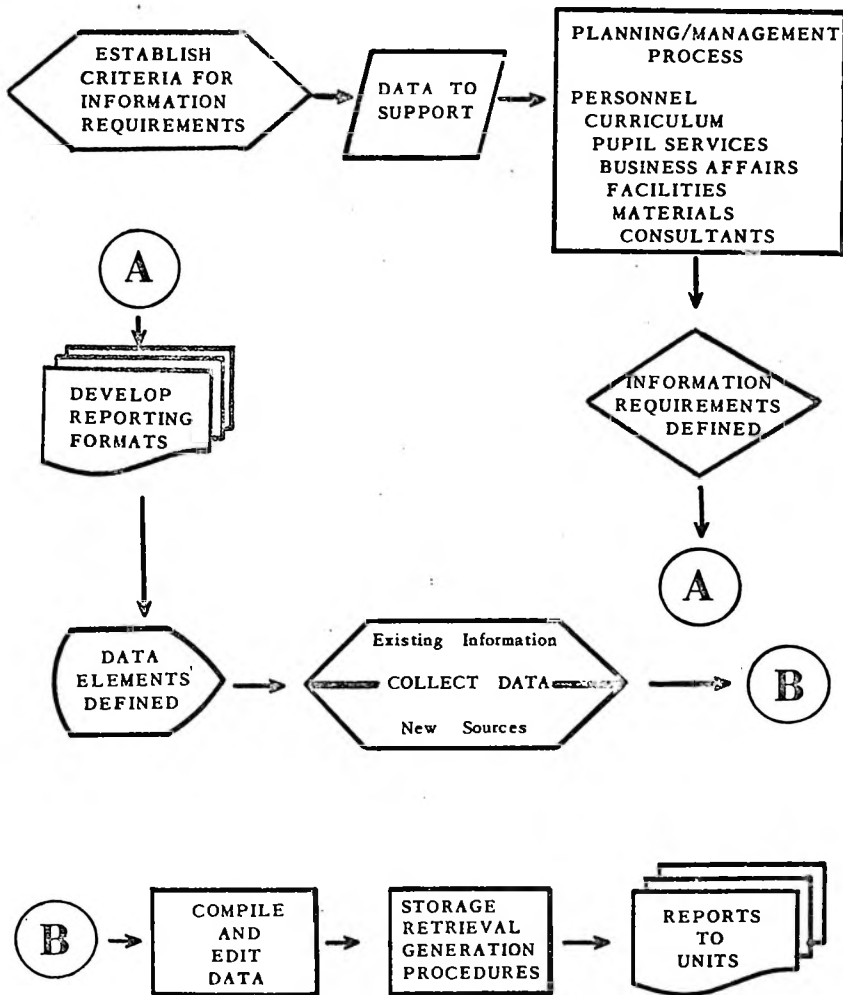
Any formal system of procedures established to provide useful symbolic information in the planning and decision-making processes of management is an MIS. Educational planning requires the selection of an action from among alternatives, and the greater the number of alternatives made available through the information system, the greater the probability of improving the quality of the decision. Direction, analysis, and control for general administration purposes are provided for by the three basic functions of any MIS: collection, processing, and distribution of data.²

The General System Procedures for the MIS as illustrated in Figure 3 projects the three basic functions as the collection, processing, and distributing as described by Hartley. Subsequent to the identification of the categories of information, the development of reporting formats for the collection of data elements from existing and new sources of information is provided. The processing step includes the compilation, editing and storage of the elements. Retrieval and generation procedures provide for the distribution of the data to the administrative units.

There is no mystique to the MIS; its practicality, adaptability and effectiveness are discussed in simplicity

²Harry J. Hartley, Educational Planning-Programming-Budgeting (Englewood Cliffs: Prentice-Hall, Inc.), p. 255.

FIGURE 3
M I S
GENERAL SYSTEM PROCEDURES



by Bushong in his MIS model for the Dallas Independent School District:

The design of an MIS requires definition of system functions, which represent the operational requirements of the system. An MIS must be able to receive, process, store and produce information as required. The efficiency of a system in performing these operations determine system effectiveness.³

The model conceptualized for Dallas is adaptable and practical for the development of any MIS.

The general systems procedure for the MIS developed for the administrative units of the Eastern European schools can be equally efficient and effective.

Theorizing the General Planning Model

The availability of the MIS to the administration of the Eastern European schools can make available essential data for the decision makers of the schools. To provide continuity and stability to the educational programs of the individual schools, the MIS is presumed a system within a system. Limberg describes the MIS as the "attuning mechanism" for the larger system. He observes that people and the structure of an organization must be well attuned to objectives: (1) the goal to be achieved, (2) that there are people by which the organization gets its work done, and (3) there is structure, the way people are located in working relationships with each other.⁴

⁴Herman Limberg, "Organization and the Management Information System," Office, LX, No. 1 (1964), p. 12.

The User's Guide for SEA Planning Process,

developed at the University of Alabama for the Office of Education, Department of Health, Education and Welfare, under the co-direction of Dr. Merlin G. Duncan and Dr. Paul G. Orr, offers a model for the conceptualization of the planning and management of an educational agency. It describes its purpose as a design to ". . . provide a framework that should permit the agency to adapt its own unique requirements within the framework while preserving an orderly and rational approach to planning and management." It further states as the goal of such an agency "to improve education at all levels within their sphere of influence" and, second, the "responsibility of developing their internal structure in such a manner that will insure the most effective and efficient means of achieving this educational improvement."⁵

The suggested model provides for external and internal management processes. External management refers to the efforts of the SEA to manage state-wide systems through influence not command alone. Internal management refers to the attempts of the SEA to govern its own operations. The model is meaningful to the purposes of this study for three inherent reasons:

⁵Merlin G. Duncan and Paul G. Orr, User's Guide for SEA Planning Process (DHEW/Office of Education, Washington, D.C., Contract No. OEC-0-71-3132 284, September 1, 1971), p. ii.

(1) it provides procedure for the inclusion and operation of the MIS, (2) it provides a guide for both internal and external management, and (3) it is designed for direction through influence or cooperative action.

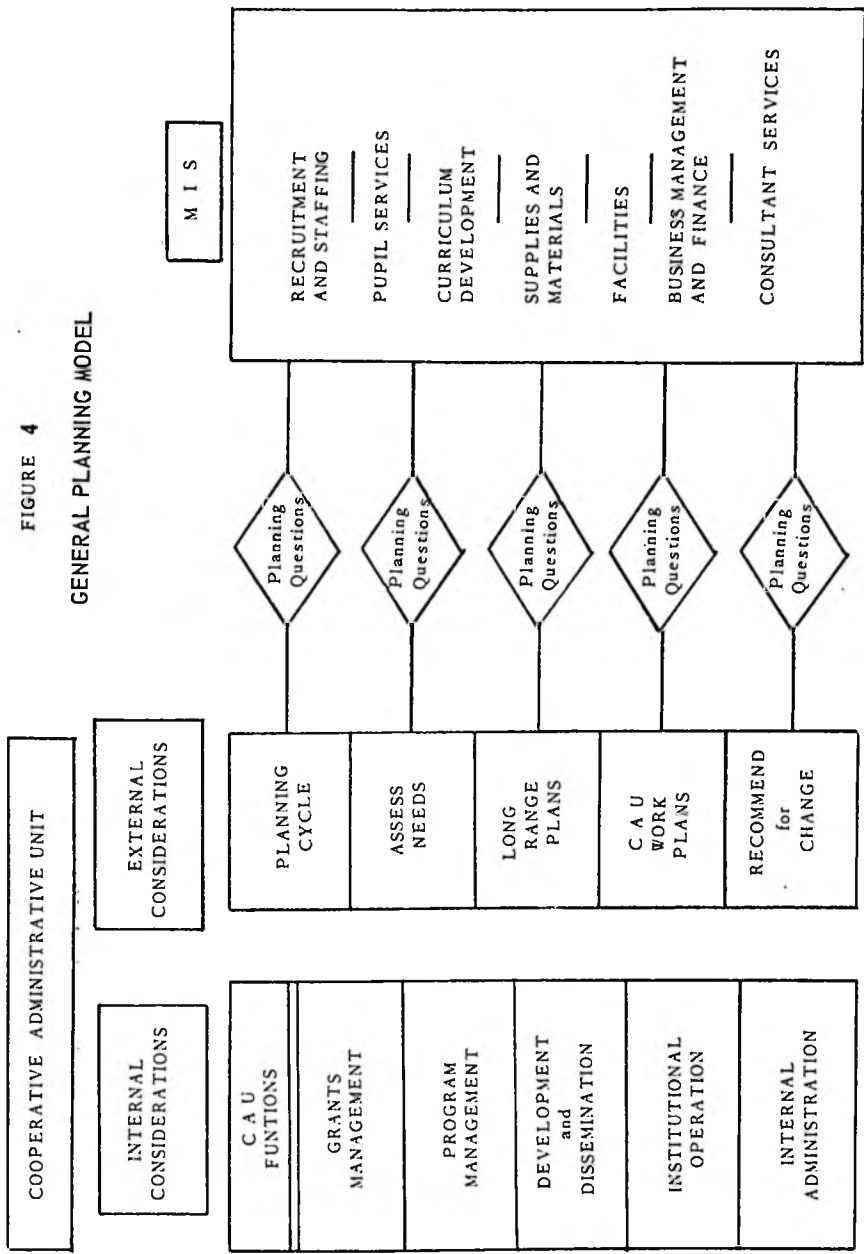
The General Planning Model (Fig. 4) is an adaption from the 'User's Guide to the purposes of the cooperative administrative unit theorized for the Eastern European schools. It is conceded that the model of the User's Guide is designed for use by state agencies (SEA's) and other sophisticated systems, but the system is adaptable in functional approach to the needs of smaller systems. The general model as described in the User's Guide emphasizes that it is designed to provide:

. . . the possibility of adopting as much as seems appropriate in the light of the individual circumstances of the SEA. The unique characteristics of the SEA and its present strengths and weaknesses should be and must be the final factor in the determination of the usefulness of the exact organizational and procedural pattern proposed.⁶

The General Planning Model (Fig. 4) illustrates the function of the cooperative administrative unit (CAU) as an SEA serving the interests of the seven Eastern European American-supported schools. The basic idea generated in the internal considerations area is the management of the administrative unit must provide for the functional responsibilities of the unit in some fashion.

⁶Duncan and Orr, Op. cit., p. ii.

FIGURE 4
GENERAL PLANNING MODEL



Advantages of a functionally organized unit

include the following:

1. Functions of the unit will be generally constant even though funding sources might vary.
2. The functionally organized unit eliminates duplication of efforts, files, and other activities of the seven schools, and facilitates a line of communication.
3. The administrative officer of the unit is in a better position to set priorities because functionalism breeds a program oriented approach to management, thus aiding the planning process of the unit.
4. Each functional activity becomes an integral part of the unit. Consequently, the unit becomes one organization rather than a group of independent activities.⁷

The General Model identifies five areas of internal responsibility: program management, development and dissemination, grants management, program planning and evaluation, and internal administration. The narrative accompanying the conceptual model in Chapter IV will provide explanation of the relationships of the five areas.

External management refers to the efforts of the unit to coordinate the activities of the seven schools through influence--not command. The functions that are included but not limited to this attempt would be (a) research, (b) information and assistance, (c) technical assistance, and (d) grants management (resource

⁷Ibid., p. 6.

distribution). Further explanation will be given to the external considerations in the text accompanying the conceptualized general planning model in Chapter IV.

CHAPTER IV
PLANNING FOR IMPLEMENTATION

The Management Information System has identified specific information to assist in the decision-making process. It was evident that some procedure must be developed to generate the specific reports and data elements upon demand. More specifically, it was necessary to develop a logical process to identify detailed information needed to gather raw data before the actual storage/retrieval/generation operations are performed.

MIS General System Procedures

Use of the systems approach identified a rather basic, but adequate general system procedure. The first step was to determine what the EES Heads needed to know to support the planning and management of administrative decision-making. Next it was necessary to provide reporting formats that would assure maximum utilization of information by the administrative decision-maker (MIS Reporting Formats). The third step was to determine the specific data elements needed to produce the various reports. The next step was to develop a procedural technique for the continuous collection of data elements.

The collection of these data was accomplished in two ways. The interview of decision makers identified existing sources for the utilization of available data and suggested other sources. The next step was to edit the data and prepare it for systemitized operation (Report Generation Procedures).

MIS Report Generation Procedures

Data required on the input document is collected at the individual school and/or by the administrative unit. This input can be used for initial file building or for the update functions of the seven information files.

The systematic operation is reflected in the general systems design for the MIS. Within the systems design, procedures are developed to build files, update files, collect data, edit data and store the collected data in one of the six data files. Procedures are also provided to retrieve and report data, utilizing the data files to generate reports useful to the schools, CAU, A/OS, and other related agencies. The file index function, a supporting function, provides facilitating linkage between subsystems.

The output of the system is the generation of reports. It will generate all standard reports necessary for the schools, CAU and A/OS, and special reports to satisfy specific requirements. All reports may contain data from any or all of the data files. Obviously, the

system would be required to manipulate required data and generate required reports on demand to assure timeliness.

Model of File Requirements

Rationale for the array of data elements included in the several subsystems of the Management Information System is reflected in the following general criteria. The justification for the inclusion of data elements is in terms of compatibility with the criteria:

a. Confirmation of decision makers.

The presence of both board members and school heads during the Eastern European school meetings suggests a departure from the traditional separation of policy and decision-making.

b. Practicality of the seven data categories.

Formal questioning attempts to reaffirm to the final development of an information system the administrative practicality of the seven categories, and to identify constraints (political, logistical, financial and others) which might eliminate one or more of the categories from the information system.

c. Additional categories for the system.

Direct questions are posed, but the analysis of the interview results is concerned with both direct and deductive answers.

d. Utilization of data.

The data are to be evaluated in terms of management utilization--whether it provides the usable information for decision-making and educational planning.

e. Availability of the data.

The information must be available from an identified source and be accessible for collection, editing, and maintenance in the most useful and usable form.

f. Maintenance of the data.

The effort required to maintain the data element for effective utilization should not exceed the value of the data.

Categories of Data

The literature reviewed and data collected from the 1967-1971 working papers of the Eastern European Schools resulted in the identification of seven categories of information requirements. It was considered necessary to validate these requirements by exposing them to a question/answer/discussion of validity with the key decision makers in the schools.

Bushong reports that a commonality exists among categories and subsystems of data as defined by the United States Office of Education Handbook Series, the Texas Education Agency, the Midwestern State Education Information Project and the consolidated results of his study of MIS characteristics.¹ Although Bushong's study provided the basis for the interview instrument, the unique information needs and the flexibility of an MIS are reflected in the amended data elements.

¹Bushong, Op. cit., p. 15.

Through interview of the principal decision makers in the schools (Appendix B), the seven categories were identified as practical for inclusion in the MIS. Decisions for which EES Heads are responsible in each of the functional areas include the following:

1. Recruitment and Staffing.--estimation and identification of staffing needs; hiring new personnel; scheduling; assignments; evaluation.
2. Pupil Services.--identification of pupil needs; guidance and counseling services; assessment of those services currently offered; adoption of methods for pupil achievement; evaluation of effectiveness of testing programs.
3. Curriculum Development.--identification of pupil and community needs for program planning; design of the curriculum, determination of changes from assessment of student achievement versus effectiveness of the curriculum and objectives.
4. Supplies and Materials.--inventory of supplies and materials available; determination of supply needs in terms of program development and long-range planning; descriptions and availability lists; source information.
5. Facilities.--assessment of effectiveness of present operation; planning for future needs in terms of personnel, finance, facilities, operational policies and practices; host country restrictions.
6. Business Management and Finance.--current financial situation; budget and long-range planning; O/OS Reports; funding information.
7. Consultant Services.--assistance for the assessment of current state of total educational program, projections of long-range needs and objectives; long-range planning of educational priorities, methods, techniques; future evaluation of effects of this

planning. Identification of programs to be evaluated; design of evaluative techniques and specific targets.

An additional purpose of the interviews with EE decision makers was the identification of categories of data considered crucial to decision-making for the EE schools. Those in attendance at the EE Workshop in Belgrade, 18 - 21 April, 1972 (Appendix C) were in unanimous agreement that an eighth category relevant to political relationships with host country governments be included. The turnover of EE school people and arbitrary action of Eastern European governments has created a vague and often misinterpreted relationship between the two. As a result of the unanimity of opinion, a category, 8) Host Country Relationships, is added to the seven originally planned for the MIS. The flexibility of the MIS assures ready expansion.

The interviews contributed to the amended category information requirements as follow:

Recruitment and Staffing

The objective of the Recruitment and Staffing Subsystem is to gather and maintain data elements concerning all personnel who are employed by the school. The Subsystem is divided into two parts; one part contains recruitment sources and related information about those who teach and are involved in the instructional process, while the other

Figure 5

MIS REPORTING FORMAT

RECRUITMENT AND STAFFING

Recruitment and Staffing									
Applicant Availability January, 1972									
Primary Grades									
CAU									
Applicant	Sex	Age	M.S.	Nat.	Experience		Deg.	Avail	File
					USA	OS			
Bruce, P.	F	29	M	USA	3	0	BS	9/72	No
Duffy, B.	F	34	S	USA	8	3	MA	9/72	Yes
Nordin, A.	F	30	M*	USA	12	0	BS	9/72	Yes
Nordin, L.	M	42	M*	UK	2	1	PhD	9/72	No

Purpose: An initial listing of available applicants for teaching positions in Eastern European schools. Individual files with interview notes, references, and other information forwarded upon request.

Frequency: Monthly December through April and as requested.

Users: CAU, EE boards and school heads.

part concerns personal information regarding employed teaching and non-teaching personnel.

Data Elements:

Part I:

1. Source of Application
 - a) Personal
 - b) Agency
 - c) Other
2. Personal Interview
3. Third Party Interview
4. Availability
5. Recommendations

Part II:

1. Legal Name
2. Passport Identification
3. Sex
4. Nationality
5. Date of Birth
6. Native Language
7. First Degree or Equivalent Earned
8. Date First Degree Granted
9. Educational Institution Granting First Degree
10. Name of Highest Degree Granted
11. Date Highest Degree Granted
12. Educational Institution Granting Highest Degree
13. Other Degrees or Equivalent Earned
14. Dates Other Degrees or Equivalent Earned

15. Date Last Recorded College Attendance
16. Semester Hours of Last Credit Earned
17. Avocational Interest and Abilities
18. Other Languages and Proficiency
19. Type Certification Held
20. Expiration Date of Certificate
21. Areas of Specialization (Elementary, Secondary, Principals, etc.)
22. Years in Present Assignment
23. Employment Previous Year
24. Annual Contracted Salary or Wage
25. Other Assignment Duties of Teachers
26. Previous Health Record
27. Verification of Immunization

Pupil Services

The objective of the Pupil Services Subsystem is to gather and maintain data elements concerning every pupil in the school. Perhaps there are more data elements pertaining to pupils than there are in all the other subsystems combined. Therefore, extreme selectivity was required in the determination of the elements included.

1. Pupil's Name
2. Birthdate
3. Sex
4. School Location
5. Date Entered Passport Identification

Figure 6

MIS REPORTING FORMAT

PUPIL SERVICES

<u>Pupil Services</u>					
Enrollment by Nationality					
School: MOSCOW Date: Oct., 1971					
Grade	USA	Host Country	Third Country		Total
			Eng.Speak.	Non-Eng.	
One	13	0	3	4	20
Two	17	0	5	4	26
Third	16	0	5	6	27
Fourth	17	0	7	5	29

Purpose: CAU reports to A/OS and host country governments. CAU and individual school projections for future planning.

Frequency: Semi-annual reports to the CAU. MIS combined annual reports to the schools.

Users: The A/OS, CAU, school boards and heads.

6. Parent's Profession
7. Date Entered School
8. Grade in Which Currently Enrolled
9. Nationality
10. Voluntary Participation in Extra or Co-Curricular Activities
11. Native Language
12. Language Needs
13. Language Program Participation
14. Achievement Batteries
 - a) Identification of battery
 - b) Norm group
 - c) Date of administration
 - d) Identification of subtests scores
 - e) Score
15. Ability or Aptitude Battery
16. Status After Withdrawal

Curriculum Development

The Curriculum Development Subsystem would provide scope and sequence information regarding programs being taught in the various schools. The addition of other information would permit a comprehensive curriculum file.

Data Elements:

1. Grade Level
2. Minutes per Week
3. Weeks per Semester
4. Term Offered
5. Program or Project (for purpose of A/OS funding)

Figure 7

MIS REPORTING FORMAT

CURRICULUM DEVELOPMENT

<u>Curriculum Development</u>									
Pre- and Post-Test Achievement Scores (Eng.)									
CAU			School: WARSAW				Date: May, 1972		
			Reading Comp.		Reading Vocab.		Arithmetic Comp.		Arithmetic Reasoning
Pupil/Grade			Pre	Post	Pre	Post	Pre	Post	
Holt, H.	6	7.2	8.4	7.5	8.7	7.5	8.7	8.1	9.5
Jepsen, J.	6	6.3	7.2	6.5	7.4	6.9	7.7	8.2	9.2
Jepsen, P.	6	8.9	9.9	9.0	10.1	7.0	7.6	6.4	6.9
Woodward, B.	6	8.8	10.0	9.0	10.5	7.5	8.6	8.1	9.3

Purpose: To provide a composite of the achievement of pupils in EE schools. Similar reports received for both English speaking and non-English speaking pupils.

Frequency: Annually prepared and as required for special projects.

Users: CAU, A/OS, school heads, teachers and technical

6. Teacher
7. Instructional Area Description
8. Pupils Enrolled in Course
9. Organizational Patterns
 - a) Block scheduling
 - b) Modular scheduling
 - c) Ability grouping
 - d) Nongraded
 - e) Other
10. Instructional Approaches
 - a) Lecture and discussion
 - b) Problem solving
 - c) Individualized projects
 - d) Laboratory activities
 - e) Interdisciplinary instruction
 - f) Other
11. Teaching Media
 - a) Textbooks
 - b) Educational films
 - c) Programmed instruction
 - d) Other

Supplies and Materials

The subsystem is unlimited in its purposes. Data regarding local purchase, customs, regulations and alternative sources is suggested. Funding sources are included for future reference and reporting.

Data Elements:

1. School Identification Number
2. Equipment
 - a) 16mm projectors
 - b) 8mm projectors
 - c) 35mm filmstrip projector
 - d) 35mm slide projector

Figure 8

MIS REPORTING FORMAT

SUPPLIES AND MATERIALS

<u>Supplies and Materials</u>			
Locally Available Paper Supplies			
August, 1971			
CAU	Supplier	Address	Price List
	Berger, E.	131 Bahnstrasse 19 Munich, Germany	2 weeks CAU
	Nordin, D.	Hoje Gladsaxe 4 Stockholm, Sweden	2-3 weeks CAU
	Zach, F.	27 Papiergasse 19 Vienna, Austria	1-2 weeks unavail.

Purpose: Available to the schools for the annual requisitions of paper supplies. Information gathered by the CAU and schools.

Frequency: Annually in the spring and as requested.

Users: School heads, business managers and teachers.

- e) Overhead projector
 - f) Opaque projector
 - g) Microform reader
 - h) Audio tape recorders
 - i) Record players
 - j) Regular television receivers
 - k) Closed circuit television receivers
 - l) Video-tape recorders
 - m) Power equipped study carrels
 - n) Typewriter
 - o) Adding machine
 - p) Calculator
 - q) Dictating machine
 - r) Duplicating machine
 - s) Student desk
 - t) Student chairs
 - u) Student chair desk
 - v) Teacher desk
 - w) Teacher chair
 - x) Table
 - y) Movable book cases
 - z) Movable storage cabinets
 - aa) Other student stations
 - bb) Other teacher stations
6. Original Cost
 7. Source of Funds
 - a) Local tuition and fees
 - b) A/OS grants
 - c) Other
 8. Year and Month Purchased
 9. Place of Purchase
 10. Project Number (Cross reference with Finance Subsystem)
 11. Life Expectancy

Facilities

The facilities Subsystem provides a data base which describes the physical properties and equipment of a school. A unique feature of the Facilities Subsystem is that the establishment of the data base would be difficult; however,

Figure 9

MIS REPORTING FORMAT

FACILITIES

<u>Facilities</u>			
Annual Inventory			
CAU			
School: SOFLA Date: June, 1971			
Equipment	Total Items	Date Received	Source
Desks, pupil	42	1965 (30) 1969 (12)	USA Purchase A/OS Grant 64-65 Host Country Loan
Power Drill, 1/2"	1	1968	Parent Gift
Projector, 16 mm	1	1964	A/OS Grant 67-68
Terrarium, 20 gal.	2	1969	Class project

Purpose: An annual inventory list submitted by each school to the CAU to anticipate equipment needs, plan long range budget estimates and encourage maintenance and security in the schools.

Frequency: An annual report to the CAU and available to the individual schools upon request.

Users: The CAU, school heads and business managers.

the maintenance of this subsystem would be relatively simple. The Facilities Subsystem contains both property data elements and maintenance equipment data elements.

Property Data Elements:

1. School Identification
2. Kind of Area:
 - a) Regular classroom
 - b) Laboratory classroom
 - c) Special classroom
 - d) Music classroom
 - e) Miscellaneous administration
 - f) Lunchroom
 - g) Study hall
 - h) Library
 - i) Audio-visual
 - j) Media centers
 - k) Auditorium
 - l) Gymnasium
 - m) Outdoor play area
 - n) Swimming pool
 - o) Language laboratory
 - p) Science laboratory
3. Mobility of Area:
 - a) Permanently installed
 - b) Temporary and in same location for less than five years
 - c) Temporary and in same location for five or more years
 - d) Other
4. Size of Area in Square Feet
5. Type Construction:
 - a) Fire resistant
 - b) Semi-fire resistant
 - c) Combustible
6. Type Heat:
 - a) Gas
 - b) Oil
 - c) Electricity
 - d) Heat pump
 - e) Other

7. Cooling and/or Ventilation:
 - a) Air-conditioned-refrigerated
 - b) Air-conditioned-evaporative cooler
8. Host Country Restrictions

Business Management and Finance

The Finance Subsystem is designed with the objective of being an integral part of the total system rather than an isolated accounting system. The system will provide for the technique of program-oriented accounting other than the traditional line-item method.

The conceptualized system will be adaptable to both manual and automated processes. Naturally, the more sophisticated the CAU becomes at mechanizing its records, the more program information will be available.

It is beyond the scope of this study to develop comprehensive definitions and coding structures of this subsystem. However, it is assumed that this can be done to suit the CAU. Once this is done, an operational subsystem will provide output reports to meet the user's operating and planning needs. The subsystems also provide a linkage to the other subsystems so that cost of various dimensions of the educational process may be retrieved. Information of this type is useful in long-range educational planning as well as providing current information for daily operations.

Figure 10

MIS REPORTING FORMAT
BUSINESS MANAGEMENT AND FINANCE

<u>Business Management and Finance</u> Comparison of Budget with Expenditures School Reporting: Bucharest Date: Oct., 1971								
CAU	Function	General Fund	U.S. Grant Fund	Other Fund	Total Month	To Date	Budgeted for Year	(over) under
	Faculty Salary	5,000.	2,000.	500.	7,500.	22,500.	75,000.	52,500.
	Admin. Salary	1,000.	500.	500.	2,000.	6,500.	17,500.	11,000.
	Maintenance Salary	100.	0.	50.	150.	450.	1,500.	1,050.
	Teaching Materials	2,000.	1,000.	250.	3,250.	5,750.	4,500.	(1,250.)

Purpose: A monthly report to the CAU for analysis of the financial accountability of the individual school. A management checkpoint for the responsible use of United States Department of State grant funds. Serves as preliminary information prior to budget preparation.

Frequency: Monthly from the school to the CAU.

User: CAU

Data Elements:

A listing of the data elements included in the finance subsystem are listed below with definitions where applicable.

1. Organization.--The organization element identifies the organizational unit responsible for performing defined functions and programs.
2. Fund.--The fund element identifies the specific source of money for budgetary and financial accounting purposes.

Examples are:

- a) General Operating Fund
 - b) Designated Purpose Fund
 - c) Interest and Debt Fund
 - d) Construction Fund
 - e) Auxiliary Services Fund
 - f) General Fixed Asset Accounts
3. Chart of Accounts.--The chart of accounts element identifies the specific transaction account classification, function and object. The element comprises three identification subsystems as follows:
 - a) Account classification.--identifies the descriptive heading within which the financial transactions are recorded.
 - (1) Assets
 - (a) cash
 - (b) receivables
 - (c) inventories
 - (d) land
 - (e) buildings
 - (f) furniture and equipment
 - (2) Liabilities
 - (a) accounts payable
 - (b) loans payable
 - (c) bonds payable
 - (d) wages payable
 - (e) accrued expenses

- (3) Revenue
 - (a) tuition and fees
 - (b) grants
 - (c) other

- b) Function.--identifies the specific purpose of an expenditure.
 - (1) Instruction
 - (2) Instruction related services
 - (3) Pupil services
 - (4) Administration
 - (5) Plant maintenance and operation
 - (6) Ancillary services

- c) Object.--identifies the specific item or service acquired in exchange for an expenditure.
 - (1) Payroll
 - (2) Purchased and contracted services
 - (3) Supplies and materials
 - (4) Operating expenses
 - (5) Debt service
 - (6) Capital outlay

- 4. Program.--The program denotes the substantive content and activities of the school to achieve a designated learning objective.

- 5. Educational Span.--The educational span identifies the educational level of the pupil receiving services such as early childhood, elementary, or intermediate.

Consultant Services

The Consultant Services Subsystem provides a data base which describes sources for technical assistance to

Figure 11

MIS REPORTING FORMAT

CONSULTANT SERVICES

<u>Consultant Services</u>					
Language Arts					
September, 1971					
CAU	Specialty Areas	Consultant Source	Name	Overseas Reference	Available
	K-12	Columbia U. N.Y.	Duffey, W.	Bucharest	Full Time
	K-12	NCTE, Urban Ill.	Maxwell, J.	Vienna	2-3 weeks
	K-12 TEFL	Ala. Univ. Univ., Ala.	Miller, J.	Manila	2-3 weeks
	K-6	Balt.Count. Sch., Md.	Kulinski, E.	Warsaw	6 weeks

Purpose: To identify sources of technical assistance available to schools within the CAU.

Frequency: As requested.

Users: CAU, school boards, heads and teachers.

the schools in terms of potential school needs. It is subdivided in the previously defined categories and lists elements of technical sources available for aid.

Data Elements:

1. Recruitment and Staffing
 - a) Cooperative Administrative Unit (CAU)
 - b) Office of Overseas Schools (A/OS)
 - c) International Schools Services (ISS)
 - d) Colleges and universities
 - e) Regional organizations
 - f) Host country agencies
 - g) Other
2. Pupil Services
 - a) CAU
 - b) Colleges and universities
 - c) School to school
 - d) Host country agencies
 - e) Other
3. Curriculum Development
 - a) CAU
 - b) A/OS
 - c) College and universities
 - d) Regional organizations
 - e) School to school
 - f) Accrediting associations
 - g) Host country agencies
 - h) Other
4. Supplies and Materials
 - a) CAU
 - b) Regional organizations
 - c) School to school
 - d) Host country agencies
 - e) Other
5. Facilities
 - a) CAU
 - b) A/OS
 - c) American Association of School Administrators
 - d) Colleges and universities

- e) School to school
 - f) Host country agencies
 - g) Other
6. Business Management and Finance
- a) CAU
 - b) A/OS
 - c) Colleges and universitites
 - d) School to schools
 - e) Other
7. Consultant Services (Total Sources)
- a) CAU
 - b) A/OS
 - c) American Association of School Administrators
 - d) Association for the Advancement of International Education
 - e) Colleges and universities
 - f) School to school
 - g) Accrediting association
 - h) Regional associations
 - i) Host country agencies
 - j) Other

Host Country Relationships

The Host Country Subsystem is added at the advice of the current heads of the EE schools. During interviews and verification (Appendix B), it was determined an information system to provide data regarding the political relationships was crucial.

1. Program Authorization
 - a) Legal
 - b) Extra-legal
 - c) Diplomatic permission
 - d) Other
2. Faculty
 - a) Visas
 - b) Work permits
 - c) Families

Figure 12

MIS REPORTING FORMAT

HOST COUNTRY RELATIONSHIPS

Host Country Relationships			
Visa Conditions			
CAU		January, 1972	
School	Country	Time Length	Travel Restriction
AID, Prague	Czechoslovakia	One year	No
AIS, Warsaw	Poland	Six months	Yes
IS, Moscow	USSR	Six months	Yes
IS, Zagreb	Yugoslavia	One year	No

Purpose: A composite of visa conditions in the six countries where the seven EE schools are located.

Frequency: CAU annual report to schools.

Users: CAU, EE boards, heads and teachers.

- d) Housing
 - e) Salary and benefits
 - f) Restrictions
 - g) Other
3. Local-Hire Personnel
- a) Government assigned
 - b) Professional
 - c) Non-professional
 - d) Salary and benefits
 - e) Restrictions
 - f) Other
4. Facilities
5. Government Reports
6. Legal Requirements
7. Restrictions

Information Reporting Format Models

The purpose of the MIS is to provide the Eastern European schools' decision maker with usable information. The reports generated by the system should satisfy the requirement.

The system has the capability of generating a variety of reports. It can satisfy the reporting requirements of the individual school, CAU, and A/OS. In addition, the information used by the local decision maker is restricted only by the perceptiveness of the user.

A group of model reports has been prepared. The forms (Figures 5-12) intend to show the system capabilities and are not presumed to be all inclusive. Although only one sample form is provided for each subsystem, the variety and number of forms adaptable to the reporting

system are infinite. It is noted that the information source is within the EES or CAU, however data may originate at any source.

The Cooperative Administrative Unit

As previously described in Chapter III, the purpose of an educational agency is to provide a framework which permits self organization while preserving an orderly and rational approach to planning and management. The General Planning Model (Figure 4)² theorized in Chapter III contains elements for self discipline and extra-management capability. The internal and external considerations integrated in the model assure the broadest of management definitions.

A unique characteristic of the General Planning Model and one of essential meaning to the cooperative management of the seven schools in Eastern Europe is the capability of management through influence rather than command. The traditional independent structure of overseas schools places a premium upon cooperative action in the development of any multi-school management structure.

The Cooperative Administrative Unit (CAU) designed as a model for the management of the seven schools contains the inherent strengths of the General Planning Model, and is dependent upon a capability of influential

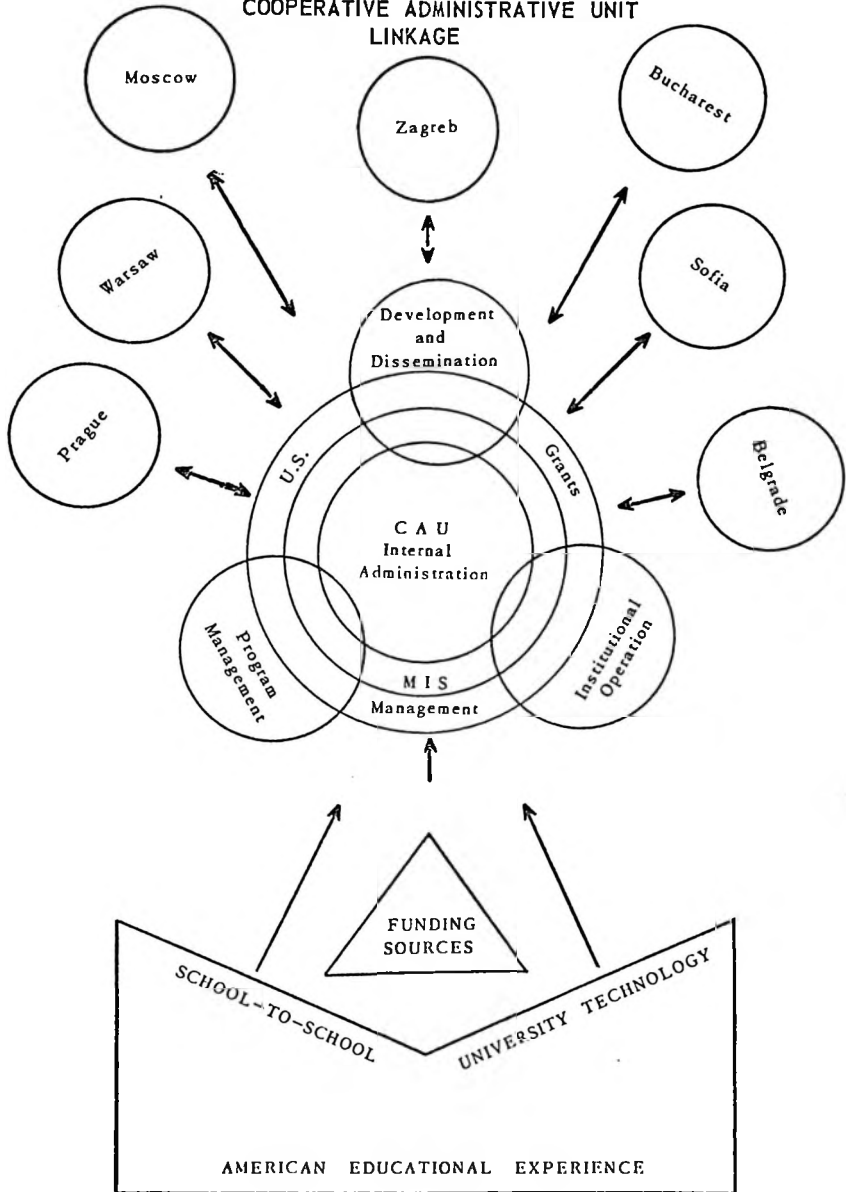
²Duncan, op. cit., p. 15.

management. The CAU model presented offers a management unit functionally organized to discipline internal activities and provide external management through the influence of superior capability.

The CAU identifies four areas of internal responsibility in addition to the function of internal responsibility. As illustrated in Figure 13, three areas of responsibility are crucial to the influential management of the EES's by the CAU: development and dissemination, program management and institutional operation. The three areas of CAU responsibility provide the vital linkage which systematizes the cooperative activities of all elements. A fourth responsibility, grant management, cuts across all functions of the CAU and through increased efficiency of management expands the opportunities of the total system.

The EES's are independent and autonomous, but become integral parts of a system through the linkage provided by the CAU. As represented in Figure 13, the CAU provides for its own internal management and the organization and maintenance of the MIS and funding for EES developed projects. As an EES initiates a project, the CAU resources of information and management experience are involved to maximize funding capability and the availability of technical assistance. As contrasted with current practices, the opportunities for funding and technical assistance are sevenfold through the multi-linkage provided

FIGURE 13
COOPERATIVE ADMINISTRATIVE UNIT
LINKAGE



by the CAU. Resources to school-to-school relationships, university technical assistance, regional associations, third country agencies, and other agencies become available to all EES's through the CAU integrated program.

Cooperative Administrative
Unit Planning Cycle

The responsibilities of the CAU involve program management, institutional operation, development and dissemination and grant management. To successfully achieve the goals of the total EES system, the CAU is responsible for the planning cycle (Fig. 14) as related to a continuous program of the EES's.

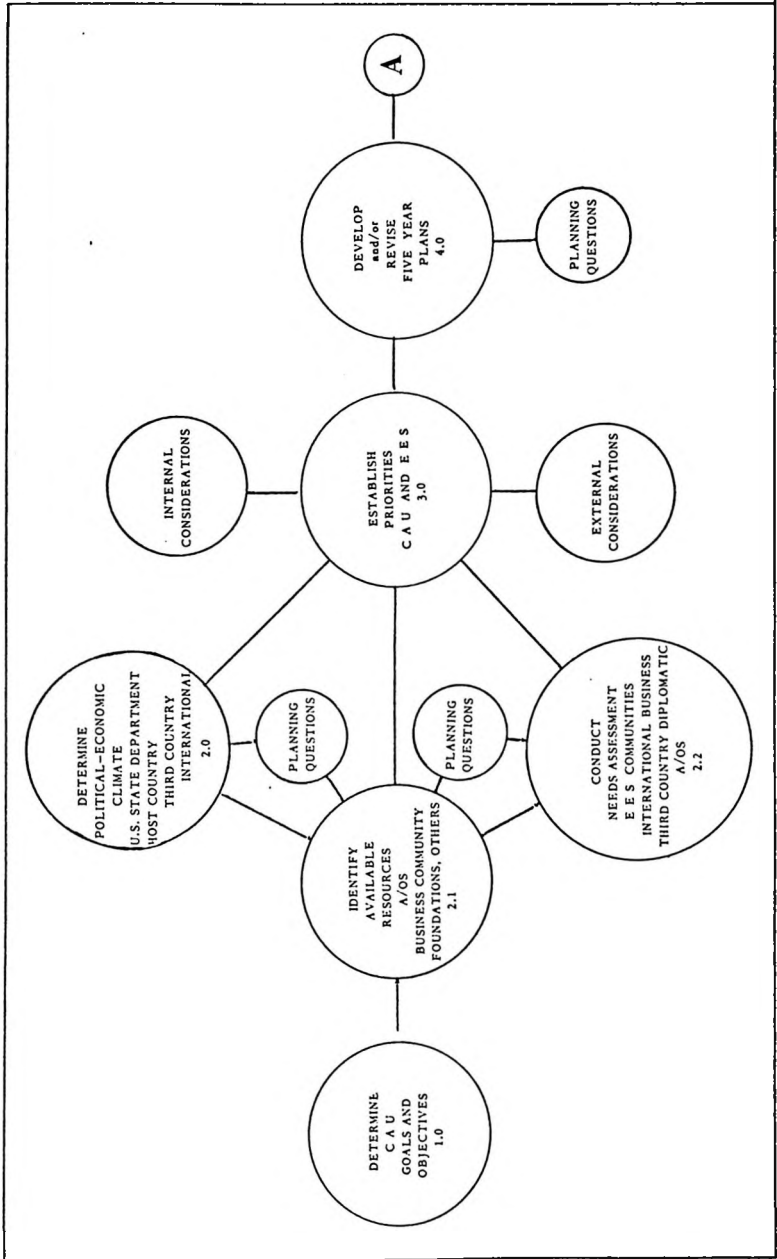
Step 1.0 Determine Goals and Objectives. It is incumbent upon the CAU to develop goals and objectives for the system in relationship to the individual and combined needs of the seven EES's.

Step 2.0 Determine Political-Economic Climate.

Step 2.1 Identify Available Resources.

Step 2.2 Conduct Needs Assessment. Essential to the planning of the CAU is a comprehensive knowledge of needs (Step 3.2), resources (Step 2.1), and political-economic climate (Step 2.0). Planning questions, previously developed and under continuous revision, are available from the CAU for generating questions

FIGURE 14
COOPERATIVE ADMINISTRATIVE UNIT PLANNING CYCLE



and relevant information. The data gathered is processed and organized for future reference in the core unit MIS.

Step 3.0 Establish Priorities for CAU and EES's. To minimize duplication of effort and maximize program goals the CAU established priorities. The priority list reflects the internal and external responsibilities of the CAU.

Step 4.0 Develop and/or Revise Five-Year Plans. Planning is a continuous operation and the long-range CAU plan is constantly under modification as related to the changing needs of the individual EES's. The founding of a new school or the closing of an EES are obvious causes for revision in the Five-Year Plan, although there are many more subtle reasons for modification.

Step 5.1 Estimate Time Available. The development of the Five-Year Plan, including the priority assignments, introduces the reality of programming for the individual EES projects. The identification of

restraints (Step 5.0) and estimation of time (Step 5.1) provides limits for the development of projects.

- Step 6.0 Develop Position Papers, Analyze Feedback. To assure continuity within the unit, the CAU generates position papers for analysis and feedback from the individual EES's and the A/OS. Planning questions are involved to give assurance of in-depth preparation. All data gathered is available from the MIS and new data gathered becomes a part of the increasing data base.
- Step 7.0 Determine Immediate Goals. The feedback of the EES's and A/OS assures practicality to the planning of the CAU and allows the identification of immediate goals. The projects authorized for immediate development are listed by priority from decisions made with information from the data previously collected and stored.
- Step 8.0 Develop Detailed Work Plan for the Next Year. With the identification of a priority list of immediate projects, the work plan for the CAU can be finalized. The data previously collected and

planning questions developed and revised provide rationale for the development of work plans.

- Step 9.0 Review, Approve, Up-Date. The continuous flow of activities within the CAU and the changes required by outside factors prohibits a static plan. The detailed work plan and planning cycle are constantly under review and adaptable to modification.
- Step 10.0 EES Detail Activities for Implementation. To assure that each EES is cognizant of the responsibility entailed in each project, detailed activities for the implementation of the work plan become the final step in the individual school planning process.
- Step 12.0 Allocation of Funds. The CAU allocates funds to the EES's as approved projects are initiated and in relationship to priorities and final schedule adjustments.

Program Management Planning Calendar

Figure 15 represented in GANTT form provides the sequence and time frame for planning for institutional operation by the CAU. Management activities performed by the CAU for each of the EE institutions include personnel recruitment and appointment, coordination in the

requisition of supplies and materials, and business management control. The three management operations are interrelated and flow in logical time sequence. Coordination of the activities by the CAU is vital to the efficiency of the management operation.

The seven EES's have personnel needs in common, all of which can be fulfilled through the CAU. At the beginning of the school year, emergency vacancies on any EES faculty can better be filled through the greater resources of the CAU. As the school year progresses, the CAU assists in the evaluation of the faculties of the schools to determine future staff needs. The CAU receives and processes applications in late fall and begins interviews of candidates for positions for the next year. Recommendations in each spring assure appointment by May. Through the summer, the CAU corresponds with appointed teachers and provides orientation by mail. The final CAU responsibility prior to the beginning of the fall term is the onsite orientation of all new faculty members immediately before embarking for the individual EE institutions.

The CAU responsibility for the requisition of supplies and materials and control of business procedures is equally logical and related. Information and data collected is added to the MIS which compounds the experience of the total system for increased operational success.

Through coordinated management of similar institutional operations, the CAU maximizes the management

process for each of the institutions. The collective personnel process, the central purchasing of supplies and materials and the coordinated business operation compound the efficiencies of any component of the system. The CAU assures both experience in management and efficiency of operation essential to the successful achievement of the educational goals of the individual EE institutions.

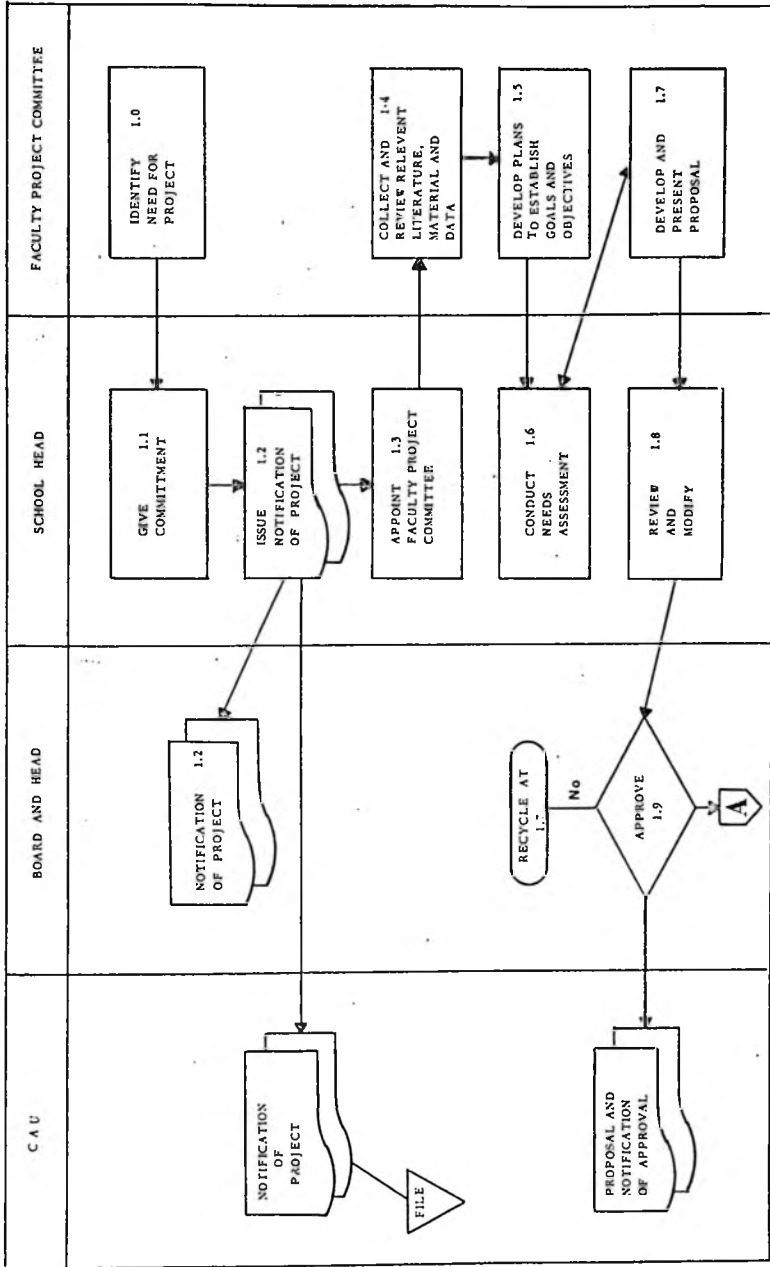
CAU Project Implementation Model

The essential purpose of the CAU is to improve the educational opportunities offered by the individual EES's. Although the successful achievement of collective operations is assured through the experienced management of the CAU, the basic function is the development, coordination, evaluation, and funding of educational projects proposed by the individual institution.

As illustrated in the Project Implementation Model shown in Figure 16, four divisions have responsibility for the implementation of any project beyond the capability of the EES.

Step 1.0 Identify Need for Project. An educational need may be identified at any level, but initiation for a program must have a point of recognition at the faculty level. Faculty recognition of need assures faculty support of the implementation of the project.

FIGURE 16
CAU PROJECT IMPLEMENTATION MODEL



- Step 1.1 Give Commitment. Following identification of the needs, the EES head analyzes the need for an educational project and commits personal support for development.
- Step 1.2 Issue Notification of Project. The EES head notifies the Board and CAU of the need and potential development of a project. The CAU files the notification for future reference if and when the project develops.
- Step 1.3 Appoint Faculty Project Committee. The head appoints from interested and involved faculty members a Faculty Project Committee to develop the project through proposal and project approval.
- Step 1.4 Collect and Review Relevant Literature. The Faculty Project Committee begins the review of relevant literature and/or collects data in support of the project development.
- Step 1.5 Develop Plans to Establish Goals. The Faculty Committee uses the information collected to establish goals and objectives for the project. It is crucial that the project goals are compatible with the objectives for the total program.

- Step 1.6 Conduct Needs Assessment. The school head pursues a program of needs assessment and involves the faculty and other sources toward a comprehensive study. The resources of the CAU can be available to the EES at any step in the process, however, the local origin of the project suggests an initial dependence upon local resources.
- Step 1.7 Develop and Present Proposal. Using the information and data collected, the faculty committee develops a proposal for formal presentation to the board. It is essential to the approval stage that the proposal rationale be complete.
- Step 1.8 Review and Modify. The EES head reviews the faculty proposal. The purpose of the review is to evaluate and modify the proposal to conform to the stated needs and objectives as previously described.
- Step 1.9 Approval.
- Step 1.9 Copy of Approval. The board and school head acting as the management team gives approval to the project upon presentation of the proposal. (Lack of approval by the board directs the

recycling of the proposal to Step 1.7 for further development by the faculty committee.) A copy of the proposal and notification of board approval is forwarded to the CAU for file reference. Notification to the CAU initiates a permanent file for project progress.

Step 2.0 Analyze Constraints.

Step 2.0 MIS Input. The EES board and head analyze the constraints upon the development of the project. The management function is aided by assistance from the data generated by the MIS activated by notification of approval at Step 1.9.

Step 2.1 Define Limits of Project. Using information and data collected and decisions made in the analysis of constraints, the board and head define the limits of the project.

Step 2.2 Identify Tasks, Performance and Evaluation for Faculty. The school head, in preparation for further development of the project by the faculty committee, defines the tasks and evaluation techniques to be performed.

Step 2.3 Develop Detailed List of Activities.

The faculty committee begins the detailed organization of the project through development of activities essential to the attainment of the objectives of the project.

Step 2.4 Estimate Available Resources.

Step 2.4 MIS Input. The faculty committee includes within the project proposal an estimate of resources available to the project and within the limits prescribed by the board. Available to the committee is MIS input describing CAU resources.

Step 2.5 Present Detailed Project Description.

The faculty committee develops in final form a detailed proposal for presentation to the board. The proposal must sufficiently detailed to adapt to analysis for funding purposes.

Step 2.6 Develop Project Budget. The EES head estimates necessary expenditures for the project in terms of the available and obtainable resources described in the proposal.

Step 2.7 Approval.

- Step 2.7 (Recycle at Step 2.5) The board and head review the proposal and approve. (Lack of approval directs the proposal recycled at Step 2.5 for revised estimate of resources.) Approval by the board implies commitment to the project.
- Step 3.0 Review and Recommend for Implementation. The board forwards the approved proposal to the CAU for review. The CAU reviews the proposal and recommends for implementation.
- Step 3.1 Analyze for Technical Assistance and Requests Funding.
- Step 3.2 Develop Evaluation Program. The CAU analyzes the proposal for the need for technical assistance (Step 3.1) and initiates request from related sources for aid (Step 3.2). The availability of technical assistance has direct effect upon the total funds necessary to the project development. The evaluation program is developed and appended to the project proposal for future control.
- Step 3.3 Input for Development of Annual Budget.

The head receives the CAU reviewed proposal with appended programs for technical aid and evaluation and assigns to the annual budget for purposes of financial control.

Step 3.4 Approval. (Recycle at Step 3.3) The board approves the annual budget and appended project. (Failure to receive approval, the proposal is recycled at Step 3.3. for budget revision.) Approval of the proposal's budget is forwarded to the CAU is formal notice.

Step 4.0 The project approval given by the board is notice to the school head that the project may be initiated.

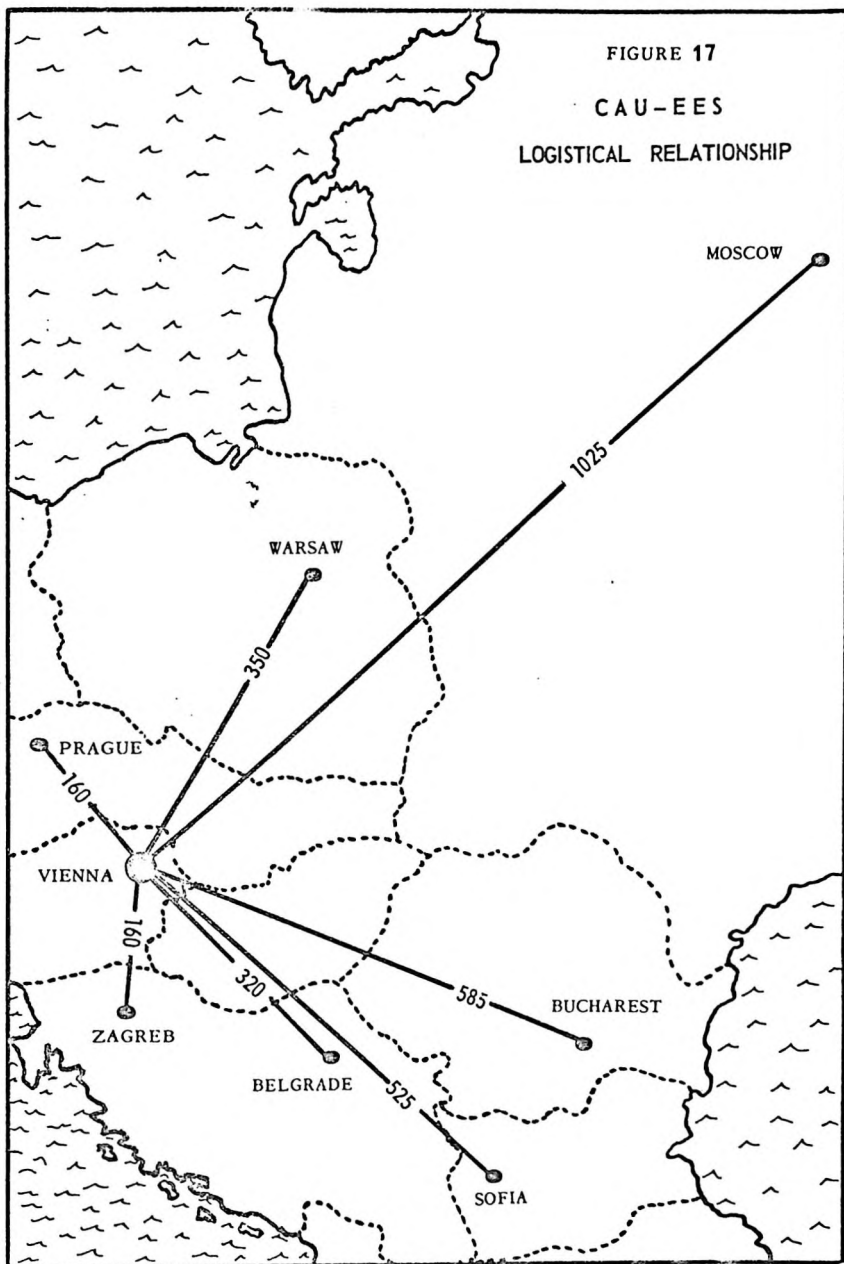
Step 4.1 Issue Progress Reports. The Faculty Project Committee, following initiation of the project, issues periodic reports to the school head. Reports are frequent and used as management check points by the head, board, and CAU.

Step 4.2 Evaluate On-Going Project. The school head provides an evaluation of the project as directed by the CAU at Step 3.2. Periodic reports of the progress and evaluation are prepared by the head for the board and the CAU.

- Step 4.3 Issue Reports. The progress reports issued by the faculty committee and evaluated by the head are forwarded to the board and CAU.
- Step 4.4 Approval.
- Step 4.4 (Recycle at Step 4.2) The CAU, upon receiving progress reports evaluates the project in terms of its goals and objectives.
- Step 4.5 Evaluate and Update. The board and head receive the approval of the progress of the project from CAU and provide local evaluation. The project is up-dated for continuous operation. The CAU is the experience and information center available to each of the three divisions located at the EES and primarily responsible for the project development, the management checkpoints at which the process is visible to CAU evaluation afford the opportunity for influential managerial direction.

CAU-EES Logistical Relationship

Although it is not the intention of the study to designate an area for the location of the CAU, logistical practicability is an obvious consideration.



The several references to Vienna, Austria as a location for the CAU (See Chapter II, Background Documentation) during the meetings of heads and board members of the EES's reflects the practicability of Vienna for the center. Figure 17 illustrates the central location of Vienna in relationship to EES's. Crucial is a location west of the Iron Curtain. It is obvious that no other location in Western Europe provides the logistical advantages of Vienna.

It is significant to the study that a brief analysis of the several references to Vienna be explained as they pertain to the factors of the site selection for the CAU:

- Accessibility - A Western European location within touch of all seven EES's is imperative for all purposes of the CAU.
- Transportation - The location should provide for air and rail transportation to and from the CAU and each of the EES's.
- Available Resources - The location should include a business community of sufficient size to facilitate requisition of supplies and materials.

- U.S. Government - The location should include access to a U.S. Embassy or Consultant for political and communication purposes.
- Educational Facilities - The availability of educational facilities be of assistance during orientation of new faculty and for general resource purposes.
- Stability - The location should reflect a history of political and economic stability to assure continuity for the CAU.
- Attraction - The location should have some attractions to encourage the EES staff members to retain continuous physical communication with the CAU.

Summary

The MIS identifies and provides for the storage and retrieval of information required for decision-making. The accumulated documentation from meetings of the decision-makers of the EE schools identified seven categories of information. Verification of the functional purpose of the categories was assured through on-site discussion with the Eastern European school heads, categories of data and format models of file requirements received similar verification. The MIS was designed as an integral component of the management system provided by the Cooperative Administrative Unit (CAU).

The CAU illustrates both internal and external considerations for the administrative unit. Basic to the internal considerations is that management of the administrative unit must provide for the functional responsibilities of the unit in some fashion. The CAU Model identifies four areas of internal responsibility in addition to the function of internal management. The four are development and dissemination, program management, institutional operation and grants management. External management refers to the efforts of the unit to coordinate the activities of the seven schools through influence, not command. The functions that are included but not limited to this attempt would be (a) research, (b) information and assistance, (c) technical assistance, and (d) grants management (resource distribution).

The Model has the flexibility of providing a design for the utilization of the MIS and serving as a format for the efficient management of collective functions. The adaptability, flexibility and comprehensiveness of the Model assure a viable organizational structure for functional growth of management responsibility.

CHAPTER V
SUMMARY, CONCLUSIONS, RECOMMENDATIONS
AND IMPLICATIONS

Summary

The purpose of this study was to develop a conceptual model for the cooperative administration of the seven American-supported schools in Eastern Europe. Special consideration was given to the need for 1) administrative continuity, 2) provision for staff stability, 3) efficient utilization of educational materials, 4) planning for meaningful curriculum, 5) effective use of resources, 6) functional management of auxiliary services, and 7) a continuous educational process.

A review of the working papers of the meetings of the heads and board members of the Eastern European schools during the period 1967-1971 reveals a number of problems of instructional and administrative concern. There are eight areas in which the decision makers of the schools emphasize need for mutual discussion and assistance:

1. Recruitment and Staffing
2. Curriculum Development
3. Pupil Personnel Services

4. Business Management and Finance
5. Supplies and Materials
6. Facilities
7. Consultant Services
8. Host Country Relationships

The identification of the seven information categories determined the theoretical framework for the development of a conceptual model for the cooperative administration of the Eastern European schools. The framework dictated two phases to the final completion of the study: 1) organization of a management information system (MIS) with relevant information available to the seven EE schools and, 2) conceptualization of a systems model (CAU) with internal and external responsibilities and capabilities.

Upon completion of a review of the documents from the 1967-1971 meetings of the Eastern European schools, the study proceeded with a refinement of seven functional categories into subunits of manageable information requirements. Using the seven categories as a comprehensive base, an interview instrument was devised to aid the refinement. Question and answer interviews and discussions with the EES decision makers provided additional data and verification of the functionalism of the categories. With the verified data, the base of information requirements was refined to produce the specificity of information for file requirements.

The next step in the procedure was a final analysis of the data for the development of a subsystem for processing the information. The subsystem provides for the selection, collection, dissemination and retrieval of information by schedule or upon request and was designed for expansion as new data categories develop. The system is functional and has the characteristics and capability of a comprehensive management information system.

The final step toward the completion of the study was to design a model for the cooperative management of the seven schools. The Cooperative Administrative Unit illustrates both internal and external considerations. Basic to internal considerations is that management of the administrative unit must provide for the functional responsibilities of the unit. The CAU model identifies five areas of internal responsibility: program management, development and dissemination, grants management, program planning and evaluation, and internal administration. External management refers to the capability of the unit to coordinate the functions of the seven schools through influence. The functions included are: research, information and assistance, technical assistance, and grants management.

The CAU model has the flexibility of providing for the utilization of the MIS and serving as an efficient

management system for collective functions. The adaptability, flexibility, and comprehensiveness of the model assure a viable organizational structure for management responsibility and functional growth.

A properly designed model can and should be graphically illustrated to validate the logic of process.¹ Graphic representations are included for the several models and related components.

The basic structure of the CAU is illustrated in Figure 4, and Figures 14, 15, and 16 are included for clarification of the CAU capability. Figure 4 represents the general planning model and the responsibility for internal and external management. Figure 14 depicts the planning cycle of the CAU and the component EE schools and other agencies. Figure 15 presents a planning calendar illustrating the capability of the CAU to perform coordinated activities for the seven EE schools. The project implementation model representing the process through which the individual EE school utilizes the CAU and integral components is depicted in Figure 16.

Figure 13 projects the linkage of the several agencies which are and can become more involved in the total function of the CAU. Illustrated is the opportunity for maximizing the individual efforts of the EE schools through the coordination of the CAU.

¹Bascom Woodward, III. A personal conversation, January 5, 1972.

The MIS, a major component of the CAU, is illustrated in several figures. Figure 3 was designed to clarify the MIS general systems procedure. The model graphically illustrates the purpose of the system from identification of information requirements to final storage for utilization by individual EE schools. Figures 5, 6, 7, 8, 9, 10, 11, and 12 present sample formats for the transmittal of information to and from the MIS. The infinite capability of the MIS is reflected in the variety of format design possible and precludes the inclusion of more than one sample for each category. Emphasized in the sample array is the opportunity for unlimited creative and functional format design.

Figure 1 illustrates the origin of the study from EES and A/OS discussions in 1966-67. The problems originally identified as common among the seven EE schools are verified as inherent through reiteration in the EES meetings held 1967-1972.

A logistical relationship of the components of the CAU is represented in Figure 17. The purpose is to depict certain criteria essential to the selection of the physical site of the CAU management center.

Figure 2 projects the process of the study from the problem identification through the concluding statements. It is significant to the purpose of planning and the reality of the problem that the original design provided valid direction throughout the study procedures.

Conclusions

On the basis of the findings of this study, the following conclusions are drawn:

1. The review of the literature suggests that the number of American children being educated in independent American-oriented, overseas schools has substantially increased since World War II and that the increase inspired by American overseas business interests will likely continue.
2. The literature reveals that the world wide expansion of American-supported schools exists behind the Iron Curtain, and there is evidence of an increase in American business activity in Eastern Europe now and projected for the future.
3. The literature emphasizes the commonality of problems faced by American schools overseas and similarly common failure to arrive at solutions through co-operative action.
4. The review of background documentation and the working papers of the 1967-1971 meetings of the EE schools discloses a variety of mutual problems resulting from rapid and continuous turnover of personnel, appointment of novice administrators, a lack of continuity and inadequate supplies and materials. Most crucial is the lack of experience needed to achieve educational goals in EE schools.

5. The review of the background documentation reveals that the constant turnover of board members and school heads interferes with efforts toward cooperative action among the seven EE schools. Repetitive discussions during the five years of meetings emphasizes the re-discovery of problems in common and the collective frustration over the lack of progress.
6. The review of the working papers identified and reiterated seven areas of functions in common among the EE schools:
 - a) recruitment and staffing
 - b) curriculum development
 - c) pupil personnel services
 - d) business management and finances
 - e) supplies and materials
 - f) facilities
 - g) consultant services

An eighth category recommended by the heads meeting in Belgrade, April, 1972 to discuss and consider the model design:

- h) host country political relationships.
7. The review of the background documentation discloses a desire among the transitory decision makers serving during the five-year period for outside assistance toward cooperative action. The inability to effect achievement from desire further substantiates the lack of continuity.

8. The review of the working papers reveals the existence of several different agencies capable and presently giving support to the seven EE schools:
 - a) Office of Overseas Schools, United States Department of State
 - b) School-to-school relationships
 - c) Association for the Advancement of International Education
 - d) American Association of School Administrators
 - e) American Colleges and universities
 - f) Overseas regional associations
 - g) American International School, Vienna.
9. The review of the 1967-1971 documentation and minutes of the April, 1972 EES meeting suggest a continuing interest among the seven schools for annual meetings to discuss mutual problems and activities. For a variety of unchanging reasons, a site in the West (Vienna, Austria, the one site frequently mentioned) has been consistently proposed for annual meetings.
10. The interviews of decision makers at the EES meeting in Belgrade in April, 1972 substantiated the validity of information categories and refined for functional purposes a subsystem of information requirements.
11. The interviews disclosed that financial experience and responsibility were basic concerns among the school heads. There was concurrence that the CAU could give necessary technical assistance in the finance function.

12. The model of the Cooperative Administrative Unit appears to be adequate in design to provide increased efficiency for coordinated management of the seven schools.
13. The model of the MIS presented in this study appears to be adequate to meet the present and expanding information needs of the seven EE schools.
14. This study and its purposes are of interest to the heads of the EE schools as indicated in the minutes of the April 18-21, 1972 meeting held in Belgrade, Yugoslavia.

Recommendations

The following recommendations for further study and action are made from the results of this study:

1. The amount of information and research regarding overseas American-supported schools is sufficient to obviate further investigation of historical problems. A focus upon solution is recommended.
2. Some study should be made to identify workable geographical and logistical groupings of American-oriented schools about the world for cooperative resolution of the common problems.
3. There is a vital need for outside assistance to schools located in isolated areas of the world where the difficulties of providing an American-oriented education for American children overseas are greatest.

4. There is a need to investigate the extent to which the autonomy of an overseas school limits progress by compounding inexperience through inherent turnover.
5. The Office of Overseas Schools in the United States Department of State should review this study for possible implementation of the recommendations as verified, moved and recorded in the minutes of the Eastern European Schools meeting held in Belgrade, Yugoslavia, 18-21 April, 1972.
6. An Eastern European Cooperative Administrative Unit as designed in this study should be given a three-year trial. The CAU should have continuous evaluation to determine effectiveness for the EE schools and the ramifications for other groups of American-supported schools overseas.

Implications

This study was initiated and the models designed for implementation by the EE schools. The review of the documentation revealed and experience substantiates that implementation without outside assistance is not realistic. Successful introduction of the CAU is dependent upon second-party direction to overcome the inertia resultant from the lack of continuity within the schools.

It is apparent that the implementation of the CAU will require funding in the initial stages. Although there

is no research of verification, there is evidence from the interviews with the EE school heads that A/OS funding of the individual school programs is sufficiently substantial to provide some initial funding for the CAU. This study is promulgated upon the increased efficiency of combined functions which implies a more efficient expenditure of A/OS funds. CAU funding, through the increased efficiency in the use of EES grants may be an implication of the study.

There is evidence that the number of American-supported schools may increase in the Eastern European countries. The CAU component for auxiliary services is designed to give assistance to the creation of new schools. The implications of the study for the future development of the CAU can be viewed in the reality of the new school in Hungary.

Around the world Americans are continuing to settle in with churches and schools. American business experience and technical assistance are an integral and essential part of the developing world. The significance of this study is best described in the previously quoted statement of Representative Ford:

It is apparent that resources of the United States Government available for the improvement of educational opportunities for American children should also be made available to American-citizen children living overseas. Their parents are serving the interests of the United States abroad. . . .

APPENDIX A
DOCUMENTATION PAPERS OF THE
EASTERN EUROPEAN COMPLEX
OF SCHOOLS, 1967-1971

UNITED STATES GOVERNMENT
Memorandum

TO: Eastern European Schools DATE: May, 1967
and School-to-School Partners

FROM: Dr. Stanley W. Krouse, Jr.
Regional Education Office, Office of Overseas
Schools
Department of State

SUBJECT: School-to-School Program in Eastern Europe

During my recent visit, I discussed with each of you a common concept for the strengthening of your School-to-School relationship in terms of providing more service to the overseas school and receiving, in return, greater input into your own school system. Basically, we discussed the following ideas and structure to accomplish the aforementioned.

There would be seven ways in which you would be able to serve the schools in Eastern Europe.

1. Assist in recruitment and staffing.
2. Assist in curriculum research and development.
3. Assist in business management, including purchasing.
4. Assist in the planning of educational facilities.
5. Assist in the provision of academic services, such as consulting in the areas of math, science, etc.
6. Assist in providing materials of instruction, such as transparencies, film strips, etc.
7. Assist in the area of pupil personnel services, such as the provision of elementary-secondary guidance service, psychological service, speech therapy, etc.

To illustrate, the following diagram will show how the expertise from each school in the School-to-School Program would be utilized.

What would the input into the U.S. school district be? Each of the schools in Eastern Europe would be responsible for two types of activities:

1. A constant flow of information from each overseas school relative to the social, economic, and political happenings in the

various Eastern European countries would be distributed weekly to the Stateside schools for use in their science courses.

2. The schools in Eastern Europe would have the responsibility for preparing unit plans for use in the Stateside schools on topics ranging from firemen in Vienna, food distribution in Poland, to a unit on the changing concepts of socialism in Romania.
3. Resource personnel sent to U.S. schools, particularly in Social Studies and language instruction.

It is hoped that the Eastern European schools will invite a representative from each of the U.S. schools with whom they are paired to attend the fall Eastern European Complex meeting at which time the details and logistics of this program, if in fact the Eastern European schools feel they would benefit from this program would be worked out.

cc: Dr. John Wilcox
Associate Secretary
American Association of School Administrators
1201 Sixteenth Street, N. W.
Washington, D.C. 20036

cc: All Eastern European Schools

March 26, 1968

Recommendations regarding the establishment of an Eastern European Regional Complex of American International Schools

1. Meeting: A discussion meeting of representatives of American International Schools in Eastern Europe was held in Vienna, Austria, March 23-26, 1968. The schools were represented by school principals W. Kobuskis, Belgrade; T. Vest, Bucharest; J. Milious, Moscow; M. Sullivan, Prague; J. Bruce, Vienna; D. Rivers, Warsaw; S. Van Meter, Zagreb; and by school board A. Dubs, Belgrade; L. Koegel, Bucharest; P. Cook, Moscow; E. Burgess, Prague; R. Johnson and J. Clayton, Sofia; J. Kaiser, Warsaw; Budapest was not represented.

Administrative arrangements for the meeting were made by Mr. John Bruce, Headmaster, American International School, Vienna. The other principal participants included Mr. Rollie White, AIS Vienna school board chairman, and consultants Dr. Frank Nardine, Dr. William Haessig and Dr. Norris King.

Subjects discussed were:

- a) Sharing information and experience among schools in Eastern Europe.
- b) The advantages of establishing a regional association of Eastern European American International Schools, and of incorporation and insurance on a joint basis.
- c) The establishment of a regional support operation in Vienna to assist American international schools in Eastern Europe.
- d) The need by posts in Eastern Europe for a secondary school boarding facility in Vienna.
- e) American experience in centralized support for local school operations, especially with respect to plant and equipment and materials procurement.
- f) Trends in American elementary school education, and in social studies at the elementary level.

2. Recommendations: The representatives present unanimously recommend establishing an Eastern European regional association of complex, and a related regional support operation for information exchange, guidance, and assistance in material procurement, storage, and sharing. In the case of most schools, the recommendation is subject to ad referendum confirmation by higher authority in the school boards concerned.

The representatives present generally favor the concept of incorporation as the Eastern European regional complex or association of American international schools, and the working out of insurance coverage on a joint basis. This expression of approval, again, is subject to confirmation on the basis of further studies of the issues, with the advice and counsel of the Department's Office of Overseas Schools (O/OS).

3. Next Steps: It was agreed that Mr. Johnson would act as rapporteur of this discussion, and would submit a summary to Dr. Krouse (O/OS) and the Eastern European posts concerned. The summary is for information only, will be supplemented by letters of confirmation to Dr. Krouse from each of the Eastern European schools, submitting additional comments or recommendations for the Embassies, School Directors, and school boards concerned.

The participants believe that leadership in establishing an Eastern European complex or association and on Eastern European regional support operations at Vienna should be exercised by O/OS, rather than by the Eastern European schools themselves, chiefly because of the constant turnover in administrative and board personnel in Eastern Europe, and the consequent inability of Eastern European representatives to follow through as individuals. The participants will now look to O/OS for analysis of and comments on the results of the Vienna meeting.

4. Objectives: After discussing similarities and differences in the needs of the different schools in Eastern Europe, it was agreed that appropriate initial objectives for a regionally-centralized approach should include the following:

- a) To reduce duplication of efforts among the individual schools.
- b) To ensure a mutually-advantageous sharing of information and experience among participating schools.
- c) To provide professional counseling and guidance, on the basis of direct, and frequent contact with American international schools in Eastern Europe and their particular problems.
- d) To assist with, and where appropriate, to centralize contacts between the schools and organizations in Western Europe and the United States, including the Office of Overseas Schools (O/OS), the International Schools Services (ISS), the European Council of International Schools (ECIS), and American educational institutions interested in school-to-school arrangements with American international schools in Eastern Europe.

5. Resume: Factors to be Taken into Account: In the course of discussions, the following observations and questions emerged:

- a) Legal relationships between American International schools and their local environments in Eastern Europe appear difficult if not impossible to define with precision. In general, the local legal frameworks do not admit the formal right of a foreign or foreign-controlled school to exist. The usual accommodation made by the local governments is to treat the schools as assimilated activities of the American Embassy and entitled to the rights and privileges associated therewith. Care should be taken in defining the character or identity of an Eastern European Association or Complex, particularly with a view to avoiding definition that could hamper or restrict operations.
- b) The majority of those present specifically preferred Vienna as the site for a support operation, on the basis of the following advantages:
 - 1) Ease of access to the majority of Eastern European posts--from one to two hours by direct air flights--to Prague, Budapest, Bucharest, Belgrade, Zagreb, Sofia, slightly longer to Warsaw and Moscow.
 - 2) The greater awareness of Eastern European realities deriving from Vienna's direct proximity to the region, as compared with locations further west.
 - 3) The advantages of location in a neutral country that is both friendly to the U.S. and well-considered in Eastern European countries.
 - 4) The advantages of association with a strongly-based school of the excellence of the American International School of Vienna.
- c) The participants recommend staffing of a Vienna operation by one officer and a secretarial assistant, either American or local.
- d) Procedures for financing can best be defined by O/OS.
- e) The schools in Eastern Europe differ from schools elsewhere, particularly in the absence of an American and foreign business community in a position to contribute significantly to financial

support. Some improvement in this respect is in prospect, but only to a minor extent.

- f) The participants would like to have copies of the Charter and By-Laws of comparable associations or complexes elsewhere.
- g) The participants anticipate that the capability of the American International School at Vienna to offer boarding facilities will depend on increasing its resources to cope with overall growth, and its ability to organize proper supervision of dormitory premises by responsible adults.
- h) The participants aspire both to conserving their individual identities and authority, and to benefiting from cooperative programs. The federated or confederated approach is favored, but the term "complex" has as many advantages as "confederation."

6. Evaluation: The participants rate the Vienna meeting and discussion as valuable, overdue, and convincing confirmation of the need for periodic confrontation of the experiences of the American international schools in Eastern Europe. The administrative support and executive direction contributed by Mr. John Bruce, acting also for Dr. Krouse, are highly appreciated.

For the Boards represented:

Richard G. Johnson

RGJ:bd
3/26/68

Copies to DCM's or Principal Offices at:

Embassies	Belgrade (3)	Prague (3)	Amcounsel	Zagreb (3)
	Bucharest (3)	Sofia (3)		
	Budapest (3)	Warsaw (3)		
	Moscow (3)			

O/OS - Dr. Krouse (5)
Amembassy Vienna (3)
AIS - Mr. John Bruce (3)

AIRGRAM
DIPLOMATIC AND CONSULAR POSTS

FROM: Department of State (O/OS) DATE: Sept. 20, 1968

SUBJECT: OVERSEAS SCHOOLS: Change in O/OS Contractual
Arrangement for Recruitment of Staff for
Overseas Schools

REF: CA-3487 of Nov. 9, 1967: CA-10557 of Aug. 30, 1968

JOINT STATE/AID MESSAGE

Under a contractual arrangement with the Department of State, the International Schools Services (ISS), has for several years provided staff recruitment services at no cost to eligible overseas schools assisted by the Department of State and AID. (ISS is a private, non-profit organization located at 392 Fifth Avenue, New York, New York 10018.) The purpose of this airgram is to announce a change in this arrangement and to request addressee posts to so notify the schools concerned by providing a copy of this message.

A major objective of the Department's Office of Overseas Schools (O/OS) is to assist independent, community-run American-sponsored schools abroad in becoming fully self-sufficient, viable educational institutions. Assistance in recruitment of qualified staff has been an important facet of the effort to meet that objective. Experience suggests that increasing numbers of overseas schools are capable of developing their own recruitment programs, and that most, if not all, should by this time be encouraged to rely more and more on their own resources for the recruitment of state-side personnel. The Office of Overseas Schools and the International Schools Services have reviewed the previous relationship with a view toward greater individualization of ISS services to schools and have accordingly agreed to continue the present contractual arrangement only through December 31, 1968. ISS will continue to recruit teaching and administrative candidates for overseas positions during the period of the contract and in general will be responsive to requests from eligible schools. But this period will also serve as a transition phase during which the schools concerned can make appropriate adjustments in the administration of their recruitment programs.

The Office of Overseas Schools, through its Regional Education Officers, will upon request assist interested schools in reshaping their recruitment programs as necessary to meet the new situation. It is evident that through experience some schools have already established the contacts and developed the means whereby they are able to meet most of their recruitment needs satisfactorily. In addition, the material and human resources which reside in ISS as a result of its years of experience in this field will continue to be available after December 31, 1968, but on an individual subscription basis worked out with each interested school. During the current transition period, ISS will be communicating directly with individual schools, and ISS officers will be visiting many of the schools to consult with school boards and administrators to assist them in developing their own self-supported recruiting programs.

In preparing future budget projections, it is important that schools take into account any additional costs that may be entailed by new recruitment procedures, costs which were previously covered under the contract between O/OS and ISS for "blanket" worldwide recruitment services. These considerations should be reflected in completing the budgetary portions of the Overseas Schools Questionnaire and related documents described in CA-10557.

Addressee posts are requested to furnish copies of this communication to eligible schools in their countries or districts.

RUSK

EASTERN EUROPEAN SCHOOLS CONFERENCE
Vienna, Austria

October 27-29, 1968

PARTICIPANTS

Chairman: Dr. Gordon Parson
Regional Education Officer
Office of Overseas Schools (O/OS)

Consultants, Observers and Guests:
Dr. and Mrs. Finis Engleman,
Executive Secretary Emeritus, (AASA)
American Association of School
Administrators
Dr. Edward Rushton,
President, (AAIE)
Association for the Advancement of
International Education
Dr. John Wilcox,
Associate Secretary, (AASA)
American Association of School
Administrators
Mrs. Seichi Yasumura
Director, International School Services

School Representatives:

Belgrade	Mr. Willard Kobuski, Director Mr. Herbert Bettinger, School-to-School, Pittsford, New York
Bucharest	Mr. Kenneth Chesser & wife, School-to- School, Clark Pleasant Community School Corp., Whiteland, Indiana
Moscow	Mrs. Dorothy Vincent, Director Mr. Paul K. Cook, Board of Directors
Prague	Mr. Mike Sullivan, Director Dr. Robert Simpson, School-to-School, Miami University Dr. Forrest Moran, School-to-School, Miami University
Sofia	Miss Elizabeth Urban, Director Mrs. Jo Anne Clayton, Board of Directors
Vienna	Mr. John Bruce, Director Mr. Ed Noziglia, Board of Directors Dr. John B. Shock, School-to-School, Baltimore County, Md.

Warsaw Mr. Herman Schwartzrock, Director
 Dr. Rudolph Fabert, School-to-School,
 Lexington

Zagreb Miss Shirley van Meter, Director
 Mr. Frank Trinka, Board of Directors
 Mr. Donald Klemer, School-to-School,
 New York

10/26/68
bd

TO: Dr. Parsons for approval, additions or deletions -
and distribution

Conference on American Schools in East Europe
October 27-29, 1968

SUMMARY REPORT

School administrators and board members from American schools in East Europe met in Vienna with the regional education officer of the Office of Overseas Schools, representative of individual School-to-School programs, consultants with expertise in international education, and the director of the American International School of Vienna on October 27-29, 1968. A complete list of the participants and their affiliation is appended. The conference was a sequel to discussions held March 23-26, 1968, for the purpose of exploring areas of mutual concern to the American schools in East Europe.

Subjects discussed included:

1. School-to-School relationships. These programs and the services they encompass were the dominant topic of discussion. At the present time, five posts participate in School-to-School relationships: Vienna-Baltimore County, Md.; Belgrade-Pittsford, N.Y.; Bucharest-Whiteland, Indiana; Prague-Miami University, Ohio; and Warsaw-Lexington, Mass. The stateside schools assist in areas such as recruitment of faculty and specialists, development of curriculum and resources, and selection and procurement of educational materials and equipment. Dr. John Wilcox, who administers the contact between the American Association of School Administrators and the O/OS, detailed the procedure for becoming a participant in the School-to-School program and described criteria for accepting stateside schools. Drs. Engleman and Rushton traced the history and development of this type of cooperative relationship between American schools and overseas schools.

2. Establishment of a regional support office in Vienna. Need for a centralized service center varies greatly from post-to-post. O/OS has no funds available to provide even a minimum staff of one professional this year and no action will be taken by the group at this time. Emerging School-to-School relationships are filling many needs which were expressed at the spring meeting.

3. Services of the International Schools Services. Mrs. Yasumura detailed recruitment procedures for staffing overseas schools and the necessity of the newly established fees for ISS placement services was discussed.

4. Re-establishment of boarding facilities at the Vienna International School. Representatives from EES unanimously urge that boarding facilities be provided for high school aged children of Americans living in East Europe.

5. Increased benefits for faculties of American Schools in East Europe. Fringe benefits such as contributions to retirement funds, insurance, and the extension of diplomatic privileges, were considered necessary inducements to attract and hold good school administrators and teachers. Information was exchanged on salary scales in the EES, existing teacher benefits and available annuity programs with the advantage of large group rates.

Conference on American Schools in East Europe
October 27-29, 1968

FOLLOW-UP:

1. Mr. Bruce's office will prepare a standardized form for exchange of information from post-to-post regarding applicants for all school positions. The exchange of information will begin in mid-November.

2. All schools should send copies of their policy guidelines, charters and by-laws to Dr. Parsons' office where they will be duplicated and distributed to all posts.

3. The Vienna school board will make available their recently revised policy guidelines.

4. Mr. Bruce's office will compile and distribute the information about salaries and teacher benefits. A standardized student record form is also available from his office.

RECOMMENDATIONS:

The representatives of the EE schools recognize the need to continue the exchange of ideas and information between schools, as well as with specialists from the U.S., and recommend a third meeting be held in March or April, 1969. The participants intend to evaluate this year's developments and make plans for the 1969-70 school year.

The representatives further recommend that these conferences be held on a regular basis in the future.

Respectfully submitted,

JoAnn Clayton
Secretary

October 29, 1968
Vienna, Austria

Enclosure - list of participants

cc: Mr. Bruce
Mrs. Clayton (2)
American Embassy - Sofia

Department of State

AIRGRAM

TO: London, Frankfurt, Vienna, Copenhagen, Stockholm, Helsinki, Warsaw, Athens, Tel Aviv, Terran, Kabul, Rawalpindi, Dacca, Calcutta, Madras, Colombo

FROM: Department of State O/OS DATE: Oct. 8, 1968
9:05 A.M.

SUBJECT: Overseas Schools: Field Trip of
Dr. Gordon E. Parsons, Regional Education Officer

REF: Joint State/Aid

Dr. Gordon E. Parsons, Regional Education Officer for Near East and South Asia and Europe will depart the United States on October 30 to visit the American-sponsored schools at the posts listed in his itinerary act out below. During his visits he will wish to confer with Embassy and Mission officers, school boards, school administrators, and school staffs. Specifically, he will wish to discuss a) the FY 1970 assistance programs, b) development plans and needs for purposes of planning future assistance of the schools, c) problems of staff recruitment, support, and in-service education, d) current programs in language and area studies and other intercultural aspects of the schools' activities with the view toward development of increased effectiveness in this sphere, e) cooperation among schools at various posts in the utilization of the services of regional curriculum specialists, f) evaluation of previous grant implementation, and g) such other matters pertaining to the schools as the posts may wish to include.

The Department will appreciate the posts' facilitating Dr. Parsons' visit by making the necessary arrangements with the schools and the school boards, by planning to meet and escort him as necessary and by making hotel reservations.

ROGERS

THE AMERICAN SCHOOL OF WARSAW

TO: Directors of All Eastern European Schools
FROM: Herman T. Schwartzrock, Director, American
School of Warsaw
SUBJECT: Final Plans Regarding Meeting of Eastern Euro-
pean Schools, November 2, 3, 4, in Vienna

Since my last letter to you, additional data has been forwarded to me regarding arrangements for our meetings.

I am happy to report that we have received a grant from O/OS for our conference. Each principal attending will receive a travel allotment which will cover a portion of expenses incurred in flying to and from Vienna. The exact amount of allotment is listed at the end of this letter. In this way we hope that each principal will be able to attend the conference. Dr. Gordon Parsons has again asked me to stress that we would like one school board member from each school to participate. It is also hoped that with the aid of the grant funds mentioned above, each principal will be able to attend the general ECIS conference, which follows our meetings, on November 5, 6, 7.

In the near future you will receive a copy of the conference schedule of events. Please advise either John Bruce or me as soon as possible regarding your plans for attending the conference, and your expected date of arrival in Vienna. I will then forward allotment checks to those principals who will be able to participate. Be sure to include your request for either a single or double room.

I look forward to meeting all of you in Vienna.

Yours truly,

HERMAN T. SCHWARTZROCK
Principal

EASTERN EUROPEAN SCHOOLS CONFERENCE
 Vienna, Austria
 November 2, 3, 4, 1969

PARTICIPANTS

Chairman: Herman T. Schwartzrock
 Director, American School of Warssw

Consultants, Observers:

Mr. John Bruce, President
 European Council of International
 Schools, and Director, American
 International School, Vienna

Dr. Martin Essex, Superintendent of
 Public Instruction, Ohio

Dr. Howard Halvorsen
 Regional Consultant, Overseas
 School of Rome

Mr. Edward Kulinski, School Consultant
 American International School
 Vienna

Dr. Gordon Parsons
 Regional Education Officer
 Office of Overseas Schools O/OS

School Representatives:

Belgrade	Mr. Elvin D. Bartel, Director
Bucharest	Miss Beverly Lasset, Director Miss June Ivelick, Assistant Director Mr. Harry Barnes, Board Chairman
Moscow	Mr. Warner Hoffman, Director Mr. Sol Polansky, Board Chairman
Prague	Mr. Donald Kessler, Director Board Chairman
Sofia	Mr. Gerry Milious, Director Board Chairman
Vienna	Mr. John Bruce, Director

Warsaw

Mr. Herman Schwartzrock, Director
Mr. Paul Glasoe, Board Chairman

Zagreb

Mrs. Phyllis Leschyn, Director

11/4/69

TENTATIVE AGENDA FOR E.E.S. CONFERENCE

Sunday night - Informal Gathering in Hotel Lounge

Monday, November 3.

- 9:30 Introductions of Conference Participants
- 9:45 Opening Remarks
- 10:00 Mr. John Bruce - "What is ECIS"
- 10:15 Dr. Gordon Parsons "Outlook for the Coming Year"
- 10:30 Questions and Discussions
- 11:00 Dr. Halvorsen "Orientation to Services Provided by Library Consultant"
- 11:30 Questions Regarding Library Services
- 11:45 - 1:45 Lunch
- 1:45 Dr. Martin Essex "The School Board's Role in Improving Educational Programs and Services." Followed by a general discussion period
- 2:30 Planning Discussion for Regional Materials and Resource Center

Tuesday, November 4.

- 9:30 Mr. Ed Kulinski "How Can We Evaluate the Small School"
- 10:00 Questions and Discussion
- 10:30 Culmination of Planning Session for Regional Materials and Resource Center
- 12:00 - 1:30 Lunch
- 1:30 Dr. Gordon Parsons - Culminating Remarks

Conference of American Schools in Eastern Europe
November 3-4, 1969

SUMMARY REPORT

School administrators and board members from American schools in Eastern Europe met in Vienna with the regional education officer of the Office of Overseas Schools, the president of the European Council of International Schools and Director of the American International School, Vienna, and consultants with expertise in various areas of education. A complete list of the participants and their affiliation is appended. The conference is the third in a series of meetings, whose purpose is resolving problems of mutual concern to the attending schools. Mr. Herman T. Schwartzrock, Director of the Warsaw school, presided.

ADDRESSES TO THE MEETING

Consultants who spoke to the group include the following:

1. Dr. Howard Halvorsen oriented the directors for his forthcoming visits to their schools at which time he will be available for consultation in the area of educational media. He announced that the tentative dates of his visits will be in March. Mr. Schwartzrock suggested that the directors take advantage of Dr. Halvorsen's recommendations in making requests for funds from the O/OS, emphasizing that mention of Dr. Halvorsen's recommendations would possibly cause favorable consideration of the grant.
2. Dr. Martin Essex, past president of the American Association of School Administrators, spoke on the school board's role in improving educational programs and services. He stated that the board bears the fiscal responsibility for its school and therefore must be active in finding new sources of income for it. He suggested that they press for inclusion in Title II and Title III grants, and that they make application for funds from philanthropic foundations. He stressed that such applications must be imaginative in their approach, and also suggested the N.E.A. and other interested organizations might lobby in the Congress on behalf of the attending schools for inclusion in the Title II and III grants.
3. Mr. John H. Bruce acquainted the group with the history, membership, purposes, and services of the European Council of International Schools. Service activities

in which the ECIS is currently engaged include the following:

- a) publication of news bulletin thrice annually
 - b) continuing attempts to establish standards of school accreditation for international schools in Europe and means whereby these schools can receive accreditation
 - c) advising heads of member schools in the area of school finance
 - d) study in curriculum development appropriate for the unique needs of international schools
 - e) study of educational testing norms for international student bodies
 - f) dispensing applications for faculty positions to member schools from the central ECIS clearing house.
4. Dr. Gordon Parsons spoke about the function of the O/OS and its services, including the granting of funds, the supplying of special educational area consultants, and cooperation in funding in-service training programs. In addition, Dr. Parsons explained O/OS's teacher recruitment and school accreditation efforts.
5. Mr. Edward Kulinski is a consultant to the American International School, Vienna, provided by the Baltimore County School District through the School-to-School Project. In dealing with the evaluation of the elementary school, Mr. Kulinski stressed that the faculty of an elementary school must be specifically trained to teach young children and that an elementary school's instructional materials must be adequate to meet the needs of children who vary greatly from one another in their abilities and interests. He stressed that the educational program of the elementary school must be articulated and flexible enough to accommodate grouping which will cope with each child's individual needs.

RECOMMENDATIONS

The group made the following recommendations:

1. That an orientation handbook for new board members be published; that this project be borne by the O/OS, a philanthropic foundation, the AASA office of Dr. John Wilcox (with help from Dr. Finis Engleman), or the Foreign Service Wives; and that the ECIS adopt a similar resolution suggesting publication of such a handbook.

2. That the schools represented at this meeting legally incorporate themselves into an Eastern European Schools Association and that a related regional support operation for information exchange, guidance and assistance in procurement, storage, and sharing of instructional materials be established.

ACTIONS

The group enacted the following:

1. Dr. Gordon Parsons was authorized to handle the legal arrangements for incorporation in the United States.
2. Mr. Donald Kessler, director of the Prague school, was named coordinator for information exchange.

FOLLOW-UP

Each director will send the following to Mr. Kessler, who will duplicate and mail copies to the member schools and to Dr. Parsons:

1. Salary schedules and descriptions of fringe benefits (Those schools which have no salary schedule should so indicate.)
2. Curriculum guides or related materials describing the school curriculum
3. A school picture
4. Information on the teaching of English as a foreign language
5. Information regarding receipt of tuition payments in hard or soft currency
6. Materials used in the orientation of new teachers prior to their departure from the United States, which gives them specific, practical information regarding their teaching assignments and their special living needs necessitated by the local situation.
7. Information concerning good candidates for teaching positions which would be of value to member schools in recruiting for next year
8. The school calendar.

The group postponed a decision to meet again in April. Mr. Schwartzrock concluded the meeting by challenging each director to develop a social studies unit on his school's city, which may be exchanged among the member schools.

Respectfully submitted,

William F. Duffey
Academic Dean
The American International
School
Vienna

Hellooo Comrades!!

Greetings from "The Snow Capital" of the world. I hope the start of your new school year was as smooth as it was here in Warsaw (gripping parents, drop-outs, drop-ins, missing supplies, pigeons in the attic, rats in the basement, telephone out of order, our one pencil sharpener broken, and to top it all off, the club bar was closed)!!

The following rumors were heard circulating around Eastern Europe this summer:

1. Beverly Lassetts has been named vice-president of Barrett's Insurance Company.
2. Two of Elvin's students tried to hijack the President's plane in Belgrade (actually they were looking for a toilet).
3. The only people with keys and combinations to the Moscow school are the NKVD.
4. The principal from Sofia hijacked the school bus to Athens--only to run out of gas at the border.
5. The children at the Prague school are using the Ambassador's office for a lunch room.
6. The Zagreb principal is quitting because the President didn't visit her.
7. The Warsaw principal was arrested in Yugoslavia because of an expired visa.
8. Sex fiend running loose in East Europe?--what distinguished-looking Eastern European principal was seen buying questionable magazines and films in Copenhagen and Stockholm during the summer????

There will be an EES conference before the ECIS conference! I talked with Don and there is money available for the conference. The financial arrangements will most likely be the same as last year (i.e., air fare and per diem to Vienna).

Don originally wanted to have our meeting in Zurich. However, after talking with Gordon yesterday, Gordon suggested we have the conference in Vienna rather than Zurich. Therefore, the EES conference will be in Vienna on November 1, 2, 3. The organization of the conference will be similar to last year's (i.e., refreshments Sunday evening (5:00) in lounge; meetings Monday and Tuesday, and leave for Lugano on Wednesday).

Don is in the process of trying to line-up a hotel with less expensive rates than the Intercontinental (keep your fingers crossed). Since Don is busy making arrangements, I volunteered to organize the discussion groups. I have some ideas for topics from your previous letters. However, if you have other topics to discuss please let me know as soon as possible. I will be asking people to be discussion leaders for the topics they have asked to be discussed. I will send you a tentative discussion schedule next week; and the final discussion schedule in Vienna, Sunday evening.

Travel from Vienna to Lugano will be relatively easy. We can leave Vienna on a 9:40 flight to Zurich--sightsee for an hour or two and leave at 13:10 by train to Lugano. There is an 11:40 flight from Vienna to Zurich; however, it leaves only 10 minutes to get from the airport to the train station. There is a train that leaves Zurich for Lugano at 15:30; however, we would not arrive in Lugano until 19:00. Since our room-and-board are paid together, we might miss dinner.

Let's encourage our School Board Chairmen to attend the conference. Comments from the board chairmen last year were very favorable. They all stated that they felt our conference was most beneficial, and they wished they had had more time to discuss mutual problems with each other. If your chairman can't attend, why not encourage a board member who will be on the board next year to attend? They will, of course, have to pay their own expenses; or perhaps their expenses can be paid by the school.

Since time is very short, please inform Don regarding the number of reservations you desire. Also send any additional discussion topics to me as soon as possible.

See you in Vienna!

Herm

QUESTIONS TO BE CONSIDERED IN DISCUSSING THE
POSSIBILITY OF AN INSTRUCTIONAL MATERIALS
CENTER FOR EASTERN EUROPEAN SCHOOLS

October 19, 1970

- I. Location
 - A. Vienna seems the logical location
 - B. Where in Vienna?
- II. Transportation
 - A. How can materials be circulated to the schools?
 - B. What transportation problems will we encounter?
- III. Coordination and Communication
 - A. Who will coordinate the circulation of materials?
 - B. How can we schedule materials (i.e., available dates, return dates, etc.)?
- IV. Time Factors
 - A. Center to school
 - B. Use of material
 - C. School to center
 - D. Reorganization of material before it is sent to the next school
- V. Primary Objectives of the Center
 - A. Immediate objectives
 - B. Long-range objectives
- VI. Types of Materials Available at the Center
 - A. Standard aids

1. Films
2. Packaged units
3. Records and tapes
4. Prints

- B. Additional ideas
- C. In which categories should we begin?

VII. Financing

- A. How much can each school afford to contribute?
- B. What amount are we willing to budget for the center?
- C. Cost of transportation
- D. Cost of a coordinator for the center
 1. Space for a coordinator
- E. How much is A/OS able to contribute?
 1. How much support can we expect from A/OS until the center is beyond the organizational stages, and is a functional department?

VIII. Summary

- A. Is the idea of developing a center feasible?
 1. Will the center fulfill the needs of each school?
 2. Will we have adequate financing?
 3. Are there more practical alternatives?
- B. Effective follow through: Where do we go from here?

APPENDIX B
INTERVIEW INSTRUMENT AND INTRODUCTORY LETTERS
FOR SCHEDULED VISITS WITH HEADS OF THE
SEVEN EASTERN EUROPEAN SCHOOLS,
16-30 APRIL, 1972

March 17, 1972

Mr. George F. Zimmerman, Director
International School of Belgrade
& American Embassy
Belgrade, Yugoslavia

Dear Mr. Zimmerman:

From 1967-1971, I served as director of the American International School in Vienna. During that time, I met and worked with heads and board members of the seven American-supported schools in Eastern Europe in an effort to develop an association for the exchange of ideas and information. Hopefully that association is still active. My experience with the group has grown into admiration for the dedication of Eastern European school heads who are providing school leadership under difficult conditions.

Upon my entrance this year into the doctoral program at The University of Alabama, I selected the Eastern European schools and the unusual circumstances under which they are administered as a dissertation topic. In brief, the study is a school management survey to identify successful administrative practices. The completed study may have significance for the seven schools in the future and to other schools in similarly unique posts. The first three chapters of the dissertation are complete and provide a review of the working papers of the meetings of the Eastern European schools from 1967 to 1971. The remaining chapters will include development of an administrative model.

To the completion of the study, I am planning a visit to each of the seven schools in April to discuss current administrative practices. I would like to visit with you and others involved in the administration of the school. There will be no forms to complete; I plan an informal discussion. I can assure you that my four years in Vienna make me sensitive to your responsibilities, and my visit will be neither time consuming nor demanding.

Dr. Ernest Mannino and Dr. Gordon Parsons, State Department, A/OS, are aware of the study and the purpose of my intended visit. Their interest and approval of the project will be communicated in a separate letter.

I will forward a tentative schedule soon and will confirm the itinerary subsequent to receiving approval for a visit. Apologies are offered for what may be an inconvenient time; as you so well know, Eastern European travel schedules are not always flexible.

I look forward to visiting you.

Sincerely,

John H. Bruce

1231 Northwood Lake
Northport, Alabama 35476

The American School of Bucharest
c/o American Embarsh (Bucharest)
APO New York 09757

March 30, 1972

Mr. John H. Bruce
1231 Northwood Lake
Northport, Alabama 35476

Dear Jack:

Your scheduled visit to Bucharest will find me about and attending our long awaited EFL Workshop in Belgrade, 16-19 April.

As you are well aware, the Eastern European Schools have been trying for three years to organize a workshop of this sort. At our annual meeting in Vienna last October, we proposed such a meeting to A/OS which has since funded the workshop.

I am chairman of the group this year, so my attendance at the workshop is a must. I am hoping for a good turnout, as this workshop may well mark the start of our long awaited EES Cluster.

Why not visit the workshop in Belgrade 17-21 April and then come to Bucharest? This would give you an excellent opportunity to gather data on our EFL program, which is an integral part of each EES' curriculum.

Time being short, I will not expect a reply before my departure for Belgrade. If you cannot schedule Bucharest the week of 24-28 April, give me another date. Please address correspondence as follows:

Mr. Warner A. Hoffman, Headmaster
American School of Bucharest
Am Con Gen (Buch)
APO New York 09757

Hoping to hear from you soon.

Sincerely,

Warner A. Hoffman

P.S. Jerry Milious, Sofia; Phyllis Leschin, Zagreb; George Zimmerman, Belgrade; and Don Kessler, Prague; all expect to be present.

INTERVIEW GUIDE

AMERICAN-SUPPORTED OVERSEAS SCHOOLS IN EASTERN EUROPE
COOPERATIVE ADMINISTRATION UNIT PROJECT

April, 1972

Person Interviewed _____

School Responsibility _____

Years in Present or Other EE School _____

Name of School _____

Date _____

Interview Lapsed Time _____

Special Notes _____

I believe you received an airgram from the A/OS explaining the purpose of this interview, and my earlier letter may also have been helpful. As you know, the seven schools in Eastern Europe for the past five years have been meeting periodically to share information and discuss the establishment of an instructional materials center. I have been authorized by the A/OS to interview heads and board members of the seven schools in an attempt to plan a model for such a center.

The project has a single aim: to plan a center which can provide information, materials and resource people for the improvement of the educational opportunities available to American children living in the Eastern European countries.

The basic concept is a cooperative administrative unit and resource center with a capability for information storage and dissemination and a management component to maximize the collective activities of the seven schools. I visualize a center in Western Europe close enough to the schools to minimize logistical problems. Vienna has often been used for meetings, however, the site is unimportant at this time.

The purpose of my visit is to identify some of the areas of decision-making faced by EES boards and heads; then to define elements of data which would help in the decision-making.

I have surveyed the working papers of the EES meetings from 1967-1971--and I have a copy of the summary for you--and have identified seven areas generally relevant to the administration of all seven schools. They are:

1. Recruitment and staffing
2. Pupil services
3. Curriculum development
4. Supplies and materials
5. Facilities
6. Business management
7. Consultant services

As we discuss the seven areas, I would like to consider several points:

1. Are these areas of responsibility which require a number of decisions from you?
2. Are there areas not included which we should add?

To help in the interview, I have listed a number of elements common to systems in the States. Let's consider the validity of each element and also give thought to others which should be added.

For example, as we discuss the first area, recruitment and staffing, what elements of information would be valuable to the process of teacher recruitment, selection and evaluation?

Recruitment and Staffing

Application	Subject Areas of Preparation
Interview	Avocational Interests
Recommendations	Other Languages
Availability	Type Certification
Legal Name	Area of Specialization
Passport Number	Years in Present Assignment
Sex	Past Employment
Nationality	Past Salary
Date of Birth	Full or Part-time
Native Language	Other Assignments
Highest Level Education	Other
First Degree	
Educational Institution	
Other Degrees	
Names of Institutions	

Pupil Services

Pupil's Name	Handicapping Conditions
Birthdate	Language Needs
Sex	Language Participation
School Location	Status after Withdrawal
Date Entered	Aptitude Battery
Date Withdrawn	Achievement Battery
Days Absent	Other
Grade Enrolled	
Ethnic Group	
Co-curricular Activities	

Curriculum Development

Grade Level	Instructional Approaches
Term Offered	Problem Solving
A/OS Program	Individualized Projects
Instructional Area	Laboratory Activities
Pupils Enrolled	Interdisciplinary
Organizational Patterns	Teaching Media
Block Scheduling	Textbooks
Modular Scheduling	Educational Films
Ability Grouping	Programmed Instruction
Nongraded	Microfilms

Supplies and Materials

16mm Projector	Calculator
8mm Projector	Dictating Machine
35mm Filmstrip Projector	Duplicating Machine
35mm Slide Projector	Student Desk
Overhead Projector	Student Chairs
Opaque Projector	Student Chair Desk
Microfilm Readers	Teacher Desk
Audio Tape Recorders	Teacher Chair
Record Players	Table
Television Receivers	Movable Book Case
Closed Circuit TV	Movable Storage Cabinet
Video-Tape Recorders	Other Student Stations
Powered Study Carrels	Other Teacher Stations
Typewriters	Executive Desk
Adding Machine	Other

Facilities

Area Description	Cafeteria
Regular Classroom	Library
Laboratory	Audio-Visual
Special Room	Media Center
Music Room	Administration
Auditorium	Mobility of Area
Gymnasium	Type of Construction
Language Laboratory	Type of Heat
Science Laboratory	Other

Business Management and Finance

Fund Descriptions
 General Operating
 Designated Purpose
 Interest
 Construction
 Auxiliary Services
 Fixed Asset Accounts

Chart of Accounts

Assets	Liabilities	Revenues
Cash	Accounts Payable	Tuition and Fees
Receivables	Loans Payable	Grants
Inventories	Bonds Payable	Other
Land	Wages Payable	
Buildings	Accrued Expenses	
Equipment		

Functions

Instruction	Administration
Related Services	Plant Maintenance
Pupil Services	Auxiliary Services

Object

Payroll	Operating Expenses
Contracted Services	Debt Service
Supplies and Materials	Capital Outlay

Consultant Services

Office of Overseas Schools (A/OS)
 International Schools Services
 Colleges and Universities
 Regional Agencies
 Host Country Agencies

Eastern European School Complex
American Association of School Administrators
Association for Advancement of International Education
Accrediting Associations
Other

That does it--unless you can think of any areas which we can add to help EE School people in planning better programs for the boys and girls of American dependents overseas.

APPENDIX C
MINUTES OF THE EASTERN EUROPEAN
SCHOOLS WORKSHOP, BELGRADE,
YUGOSLAVIA, 18-21 APRIL,
1972

MEETING OF EASTERN EUROPEAN SCHOOLS

Belgrade, Yugoslavia

April 18-21, 1972

School heads from American-supported schools in Eastern Europe and interested educators met in Belgrade to discuss English as a Second Language and other topics of mutual concern. The meeting was called by the EES Chairman, Warner Hoffman of Bucharest. Others officially in attendance were George Zimmerman, head of the host school; Lyle McCullough, Belgrade ESL teacher; Marie and Jerry Milious and Martha Brown, teacher, school head and board member from Sofia; Susan Byrns, ESL teacher from Vienna; and John Bruce, observer from The University of Alabama. The meeting was held to discuss and exchange ideas regarding the teaching of English as a second language and appended to this report are copies of the letter of notification, the program and the materials prepared by the host school. A final meeting on Friday was devoted to a summary of the conference, a discussion of future meetings of the Eastern European Schools and recommendations regarding the EES project introduced by Mr. Bruce.

English as a Foreign Language

Although a comprehensive explanation of the principal topic of the meeting can be read in the appended materials, it should be noted the host school presented a thorough review of its ESL program. George Zimmerman, Lyle McCullough and

the staff of the school were generous in the use of their time and facilities to share the ESL program and its success with those in attendance. There was time during and after the scheduled meetings to share the ideas of the several schools. It was generally concluded that the meeting was successful, that ESL should be promoted and developed in the Eastern European Schools and that further exchanges of information should be continued.

The Cooperative Administrative Unit

John Bruce acted as an observer of the meeting while discussing the project development of the Cooperative Administrative Unit (CAU) individually with the heads during the conference. In brief, the CAU is a model proposed for the collective and cooperative administration of the Eastern European Schools and includes provisions for other services and the task force operation of schools which are new to the area. George Zimmerman provided additional history for the origin of the idea from his experience as head of the Belgrade School in 1965-67, Jerry Milious and Warner Hoffman substantiated the continued interest of previous and present school heads in the development of the complex of Eastern European Schools from their experiences in Moscow, Bucharest and Sofia dating back to 1967.

Recommendations

The heads of the schools met in business session on Friday to discuss future plans of the Eastern European Schools.

1. The purpose of the meeting was a success and future meetings should be scheduled for the discussion of educational topics of mutual interest to the schools.

2. It is apparent that native teachers of the schools do not have easy access to meeting sites in the West (including Yugoslavia) and the next meeting should be planned in the East.

3. It is recommended that the next meeting be scheduled prior to December and held in Warsaw. The topic for discussion is to be the library, media center and instructional aids. Provision should be made once again to include native teachers of the several schools.

4. It is recommended that A/OS be apprised of the interest by the group in the further development of the CAU model presented by Mr. Bruce, and that a progress report be made at the meeting of school heads in the fall.

Conclusions

The group expressed its continued appreciation to Regional Officer Dr. Gordon Parsons and the A/OS for the funding and other assistance essential to the success of the meetings of Eastern European Schools. Special thanks were voted to the Belgrade school, Mr. Zimmerman and Mr. McCullough, for the warm welcome, excellent preparations and generosity of the hosts of the conference. Note was made of the interest of

AIS, Vienna and the contributions of its representative Sue Byrns. Special thanks were voted Mr. Bruce for past and continuing interest in the development of the Eastern European Schools complex.

Respectfully submitted,

Jerry Milious, Recorder
April 21, 1972

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