Development and first field test of the general welfare methodology.

William Alan Hodson
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DEVELOPMENT AND FIRST FIELD TEST
OF THE GENERAL WELFARE METHODOLOGY

A Dissertation Presented
By
WILLIAM ALAN HODSON

Submitted to the Graduate School of the University of Massachusetts in partial fulfillment of the requirements for the degree of

DOCTOR OF EDUCATION

September  1981

School of Education
DEVELOPMENT AND FIRST FIELD TEST
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iii
ABSTRACT

Development and First Field Test of the General Welfare Methodology

(September, 1981)

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Directed by: Professor Thomas E. Hutchinson

The purpose of this study was to further develop and field test a methodology which has as its purpose, "to promote the general welfare of the population." As human beings each person acts to promote her or his needs and desires. As members of communities, be they the nuclear family or the world population, people act in accordance with more broadly defined norms and understandings. The problem area of this study is the same as that which will in all likelihood remain a problem of interest as long as people band together in communities: determining and promoting the general welfare.

The first Chapter presents an overview of past writings and present examples to provide a framework for the study. The term methodology is defined as "a systematic, standardized, operational set of rules and procedures for accomplishing a defined purpose." One methodology, the General Welfare Methodology, has been developed to "promote the general welfare of the population." This Methodology
is compared with other efforts which have a similar purpose, including the United States Constitution. Some new technologies are discussed which provide new possibilities for methods to promote the general welfare. Since the General Welfare Methodology has been developed and used in educational settings, some specific implications for the Methodology in education are spelled out. Chapter I ends with a discussion of the applied or decision oriented research of this study.

Chapter II gives a brief history of the General Welfare Methodology. A description of the major processes of the Methodology is followed by an accounting of previous applications of it. Presentations of the further development undertaken prior to field testing and of the rationale for field testing round out this Chapter.

Chapter III presents a description of the function of a field test in general and the specific design of the field test of this study. The goals of the field test were:

1. To identify problems in the General Welfare Methodology,

2. To use the results of the field test to make recommendations for improving the Methodology, and

3. To apply the General Welfare Methodology in its entirety.

The field test results from the implementation of the first major step of the Methodology are also included in
this Chapter to complete the account of the field test design.

The fourth Chapter gives the field test results for the remaining steps of the Methodology as it was applied at the Community College of Vermont, Southeastern Region. A narrative account of the activities and results for each step is followed by a discussion of any differences or problems encountered in implementing the General Welfare Methodology as written at the time of this study.

The final Chapter presents the author's recommendations for improving the Methodology to help solve the problems encountered in the field test and for further research to be carried out on the General Welfare Methodology. An evaluation of the study's achievement of its goals is also included. Lastly, the author draws out some implications of the Methodology for the promotion of the general welfare of people in the field of education and beyond.

In Appendix A the result of the further development, Draft IIa, is presented. Appendix B with its attachments gives the primary documentation of the field test activities, results, and problems as they were recorded in the Field Test Log.
# TABLE OF CONTENTS

<table>
<thead>
<tr>
<th>ACKNOWLEDGEMENTS</th>
<th>iii</th>
</tr>
</thead>
<tbody>
<tr>
<td>ABSTRACT</td>
<td>iv</td>
</tr>
<tr>
<td>LIST OF ILLUSTRATIONS</td>
<td>ix</td>
</tr>
</tbody>
</table>

## Chapter

### I. PROMOTION OF THE GENERAL WELFARE: THE OVERALL PROBLEM AND THE SPECIFIC PROBLEM STATEMENT

<table>
<thead>
<tr>
<th>Historical Background</th>
<th>1</th>
</tr>
</thead>
<tbody>
<tr>
<td>The Contribution of the General Welfare Methodology</td>
<td>3</td>
</tr>
<tr>
<td>The Problem Statement</td>
<td>15</td>
</tr>
</tbody>
</table>

### II. DEVELOPMENT OF THE GENERAL WELFARE METHODOLOGY

<table>
<thead>
<tr>
<th>History of the General Welfare Methodology - Drafts I and II</th>
<th>24</th>
</tr>
</thead>
<tbody>
<tr>
<td>Description of the General Welfare Methodology - Draft II</td>
<td>27</td>
</tr>
<tr>
<td>Applications of Draft II</td>
<td>38</td>
</tr>
<tr>
<td>Development Prior to Field Testing</td>
<td>40</td>
</tr>
<tr>
<td>Decision to Field Test</td>
<td>54</td>
</tr>
</tbody>
</table>

### III. PURPOSE AND DESIGN OF THE FIELD TEST

<table>
<thead>
<tr>
<th>Purpose of a Field Test</th>
<th>56</th>
</tr>
</thead>
<tbody>
<tr>
<td>Goals of the Field Test</td>
<td>58</td>
</tr>
<tr>
<td>The Field Test Log</td>
<td>59</td>
</tr>
<tr>
<td>Design of the Field Test</td>
<td>60</td>
</tr>
</tbody>
</table>

### IV. FIELD TEST RESULTS AND DISCUSSION

<table>
<thead>
<tr>
<th>Results of Step 1.0</th>
<th>62</th>
</tr>
</thead>
<tbody>
<tr>
<td>Results of Step 2.0</td>
<td>67</td>
</tr>
<tr>
<td>Results of Step 3.0</td>
<td>82</td>
</tr>
<tr>
<td>Results of Step 4.0</td>
<td>90</td>
</tr>
<tr>
<td>Results of Step 5.0</td>
<td>94</td>
</tr>
<tr>
<td>Results of Step 6.0</td>
<td>98</td>
</tr>
<tr>
<td>Results of Step 7.0</td>
<td>104</td>
</tr>
<tr>
<td>Step 8.0</td>
<td>108</td>
</tr>
</tbody>
</table>
V. RECOMMENDATIONS FOR FURTHER DEVELOPMENT AND RESEARCH, AN EVALUATION OF THE STUDY, AND SOME IMPLICATIONS

Recommendations for Further Development .......................................................... 111
Recommendations for Further Research ............................................................... 121
Evaluation of the Study ......................................................................................... 122
Some Implications of the Methodology ................................................................. 125

REFERENCES ......................................................................................................... 129

APPENDIX:

A. Draft IIa of the General Welfare Methodology ................................................. 132
B. The Field Test Log and Attachments ................................................................. 136
   Attachment 1. ........................................................................................................ 148
   Attachment 2. ........................................................................................................ 149
   Attachment 3. ........................................................................................................ 150
   Attachment 4. ........................................................................................................ 151
   Attachment 5. ........................................................................................................ 152
   Attachment 6. ........................................................................................................ 157
   Attachment 7. ........................................................................................................ 158
   Attachment 8. ........................................................................................................ 159
   Attachment 9. ........................................................................................................ 160
   Attachment 10. ...................................................................................................... 165
   Attachment 11. ...................................................................................................... 166
   Attachment 12. ...................................................................................................... 169
   Attachment 13. ...................................................................................................... 172
   Attachment 14. ...................................................................................................... 174
   Attachment 15. ...................................................................................................... 175
   Attachment 16. ...................................................................................................... 176
   Attachment 17. ...................................................................................................... 178
   Attachment 18. ...................................................................................................... 179
   Attachment 19. ...................................................................................................... 183
   Attachment 20. ...................................................................................................... 184
   Attachment 21. ...................................................................................................... 185
   Attachment 22. ...................................................................................................... 186
   Attachment 23. ...................................................................................................... 188
   Attachment 24. ...................................................................................................... 191
## LIST OF ILLUSTRATIONS

<table>
<thead>
<tr>
<th>Figure</th>
<th>Title</th>
<th>Page</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>A Diagram of the Primary Functions of the General Welfare Methodology</td>
<td>20</td>
</tr>
<tr>
<td>2</td>
<td>Draft I of the General Welfare Methodology</td>
<td>26</td>
</tr>
<tr>
<td>3</td>
<td>Draft II of the General Welfare Methodology</td>
<td>28</td>
</tr>
<tr>
<td>4</td>
<td>The Main Resource Allocation Chart</td>
<td>68</td>
</tr>
<tr>
<td>5</td>
<td>The Resource Allocation Chart for Step 2.0</td>
<td>70</td>
</tr>
<tr>
<td>6</td>
<td>The Resource Allocation Chart for Step 3.0</td>
<td>84</td>
</tr>
<tr>
<td>7</td>
<td>The Resource Allocation Chart for Step 4.0</td>
<td>91</td>
</tr>
<tr>
<td>8</td>
<td>The Resource Allocation Chart for Step 5.0</td>
<td>95</td>
</tr>
<tr>
<td>9</td>
<td>The Resource Allocation Chart for Step 6.0</td>
<td>99</td>
</tr>
<tr>
<td>10</td>
<td>The Resource Allocation Chart for Step 7.0</td>
<td>105</td>
</tr>
</tbody>
</table>
CHAPTER I

PROMOTION OF THE GENERAL WELFARE: THE OVERALL PROBLEM AND THE SPECIFIC PROBLEM STATEMENT

As human beings each person acts to promote her or his needs and desires as they are perceived at a point in time. As members of communities, be they the nuclear family or the world population, people act in accordance with more broadly defined norms and understandings. Among the nine universal characteristics which have been identified by anthropologists to exist in all human societies (Chase, 1956), four are obviously concerned with the general welfare of the members:

1. An economic system,
2. Property rules,
3. Government and law, and
4. Religion and ethics.

One other universal characteristic, language, has been used to discuss and organize the promotion of the general welfare according to such characteristics. Some of the earliest recorded writings speak to these topics, as do some of the most recent. In all likelihood promoting the general welfare of people will remain a problem of interest as long as people band together in communities.

Having thus set forth the broad perspective of the problem area, it is necessary to limit the scope of this
dissertation. One aspect of the problem area which the author does not wish to limit is the definition of general welfare. Any specification of this term will be left to the traditions which impact on each person today, and to the visions which have been and will be generated by people through applications of the General Welfare Methodology.

It is not the purpose of this dissertation to comprehensively document the rich traditions of thought regarding the concept of general welfare. An overview of contributions to Western ideas about the general welfare will be presented in order to provide a framework within which the General Welfare Methodology operates. No attempt will be made to categorize contributions in terms of economic, political, social, or other areas of study. Rather, a concern about the promotion of the general welfare of people, however defined by them, will be the criterion for inclusion of materials in the literature review. A chronological order will be followed in presenting the authors. Exclusion of Eastern or other traditions was only because of limitations of resources for this dissertation. It is assumed by this author that other traditions could also supply an historical background and examples for the problem area.

The historical background of the problem area will be followed by a discussion of past methods and limitations as compared with present possibilities for the promotion
of the general welfare.

It is not the intent of this dissertation to describe all methods which have been used and are being used to promote what could be described as the general welfare of people. Examples of such methods, some utopian, some famous, and some current, will be presented in the historical background and later compared to the General Welfare Methodology. A case will be made that this Methodology can make a contribution to the problem area, especially in the field of education.

**Historical Background**

To guarantee individual well being, freedom, equality, justice, or self preservation, these are the major purposes put forth by Western writers for the formation of a state or any extended community. It is important to note that the concepts of economics, property, laws, the state, voting, democracy, oligarchy, monarchy, religion, and ethics all existed prior to the time of Socrates (469-399 B.C.).

Plato's (427-347 B.C.) published works included terms for all of these concepts. His thoughts regarding the proper implementation of these concepts form the basis of his works. All subsequent writings dealing with these same concerns make reference either direct or indirect, positive or negative, to Plato's ideas. Likewise he drew
from writings and examples, both good and bad in his judgement, within his known world to form his tenets.

In The Republic Plato (367 B.C. (?) / A.D. 1892) developed a comprehensive picture of the ideal state. This work sets forth a utopian vision logically derived from analyses of existing political systems. He covered all four of the universal societal characteristics relating to the general welfare previously mentioned, as well as an educational system, a functional class system, and a system of rules and procedures for implementing the principles enumerated. It was this all encompassing logical development of an ideal model from real world phenomena which made Plato a required reference for later writers on the subject.

The primary purposes of Plato's conception of the state were to foster personal freedom and to maintain security internally and externally. The primary method was a selected and trained class of rulers called guardians who administered according to a code of laws. Participation of people in the affairs of state was determined by class membership, slave or citizen, as well as the functional breakdown, and by some specifically restricted voting for representation on several functional bodies.

Plato's style or philosophical approach to the problem was essentially rational. The origins of his
state were derived from logical analyses. He explicitly avoided religious or supernatural beliefs as a basis for the state.

Aristotle (384-322 B.C.) was the first major figure to set forth his own ideas as an addition to Plato's thoughts about the general welfare. Aristotle followed his teacher's technique of analyzing existing political systems to arrive at maxims for the good state. He differed from Plato in that he concentrated on the analysis more than on defining any particular ideal state. Aristotle developed principles which could be carried out in different kinds of states. In *Politics* Aristotle (350 B.C.(?)/A.D. 1885) gave a more general purpose for the state than Plato described:

... the state comes into existence originating in the bare needs of life, and continuing in existence for the sake of a good life. (p. 3)

Aristotle also set forth a philosophical origin for the state which was based on a concept of absolute virtue:

We showed...that the virtue of the good man is necessarily the same as the virtue of the citizen of the perfect state. Clearly then in the same manner, and by the same means through which a man becomes truly good, he will frame a state which will be truly good whether aristocratical, or under kingly rule... (pp. 105 and 106)

And it was "God and the universe who [are] perfection" (p. 213).
Aristotle did not offer a particular method for the promotion of this ethereal good, but rather described principles by which types of states could enhance the general welfare. The extent and nature of people's participation in the workings of the state were not part of his principles. Plato presented a logically derived system; Aristotle gave celestially based criteria for the promotion of the general welfare.

Saint Augustine (A.D. 354-430) added specificity to the divine origins of the state by stating in *De Devitate Dei* (426, cited by Aquinas, 1269(?)/1948) that the empire of the world was given to the Romans by God as a reward for their virtues. Saint Thomas Aquinas (1225-1274) generalized this idea by stating, in *Summa Theologica* (1269(?)/1948) that:

> ... the plan of government is derived by secondary governors from the governor in chief. The plan of what is to be done in a state flows from the king's command to his inferior administrators. ... Since, then, the eternal law is the plan of government in the Chief Governor, all plans of government in the inferior governors must be derived from the eternal law. (p. 632)

Besides this clear etiology of the state, Saint Thomas Aquinas made it explicit that the purpose of the ordained state and the general welfare of its citizens also derived from God and his earthly hierarchy:
it is evident that all things partake in some way in the eternal law, in so far as, namely, from its being imprinted on them, they derive their respective inclinations to their proper acts and ends. (p. 618)

The eternal law and its worldly derivatives formed the method of Saint Thomas Aquinas' ideal state. Following divine inspiration and its stately offspring were the elements which constituted citizen participation. Under this scheme the citizens had no apparent role to play in the promotion of their own welfare. Promotion of the general welfare depended on a leap of faith.

Sir Thomas More (1478-1535) coined the term utopia to refer to an ideal human community. In his work Utopia More (1516/1895) presented a model of a state designed to insure the interests of its people through a system of representative government:

Moreover, as concerning the election of the Prince, all the officers, which are in number 200, first are sworn to choose him whom they think most mete and expedient. Then by a secret election they name prince one of those four whom the people before named unto them. . . The prince's office continues all his life time, unless he is deposed. . . for the suspicion of tyranny . . . And that is provided that nothing touching the commonwealth shall be confirmed and ratified unless it has been reasoned of and debated three days in the council before it is decreed. (p. 136)

The detailed presentation of a broadly representative system rendered More's utopia into an important model for the many changes in Western governments which followed in
roughly the next two hundred years. One of More's innovations which did not show up to any great extent in Western states was the abolition of private property for the common good:

Here where nothing is private the common affairs are earnestly looked upon. . . There where all things are common to every man it is not to be doubted that any man shall lack anything necessary for his private uses . . . (p. 299)

Francis Bacon (1561-1626) in his book The New Atlantis (1627/1730) also offered a utopian state model, with the added component of science and technology as the primary means for guaranteeing people's welfare:

The end of our foundation is the knowledge of causes, and secret motions of things; and the enlarging of the bounds of human empire, to the effecting of all things possible. (p. 245)

Together with More, Bacon reestablished a rational, secular paradigm for the state. He foresaw the importance of scientific developments for the West. He provided a model in which scientific knowledge was used for the express purpose of promoting the general welfare of people in general.

Thomas Hobbes (1588-1679) wrote Leviathan (1651/1952) about twenty years after The New Atlantis. He reintroduced God as the originator of those forces from which man and his states are derived. Hobbes' main concern
and stated purpose for the state was to avoid war. This was a reflection of the concerns of people in England at the time. **Leviathan** shows an attempt to influence the nature of the state to reflect people's needs and visions.

Jean Jacques Rousseau (1712-1778) demonstrated a similar objective in writing *The Social Contract* (1762/1952): "Man is born free; and everywhere he is in chains" (p. 387). Rousseau's major concern was freedom. This was his purpose for the state:

> What then is government? An intermediate body set up between subjects and the Sovereign, to secure their mutual correspondence, charged with the execution of the laws and the maintenance of liberty, both civil and political. (p. 407)

Although Rousseau did not set down a specific detailed model for the state to achieve this purpose, he was clear as to the general method by which the state should operate:

> The first and most important deduction from the principles we have so far laid down is that the general will alone can direct the State according to the object for which it was instituted, i.e. the common good. ... (p. 395)

The general will was soon expressed across the Atlantic in the New World and in the French Revolution.

Departing somewhat from strict chronological order, various opinions of the founding fathers will be intermixed. Three authors are represented here: Alexander
Hamilton (1757-1804), Thomas Jefferson (1743-1826), and James Madison (1751-1836).

The preamble to the United States Constitution provided the first use this author has found of the term general welfare:

We, the people of the United States, in order to form a more perfect union, establish justice, insure domestic tranquility, provide for the common defense, promote the general welfare, and secure the blessings of liberty to ourselves and our posterity, do ordain and establish this Constitution for the United States of America. (September 17, 1787)

Hamilton used the term in his speech for the abolition of the states at the Constitutional Convention (1789): "Men always love power, and states [the 13] will prefer their particular concerns to the general welfare . . ." (in Padover, p. 209). It was this concern, mitigated by the need for a decentralized power base which led the founding fathers to opt for a republican system. Madison summed it up in an article in the National Gazette, February 20, 1792:

A government deriving its energy from the will of the society, and operating by the reason of its measures, on the understanding and interest of the society. Such is the government for which philosophy has been searching, and humanity been fighting, from the most remote ages. Such are republican governments which it is the glory of America to have invented, and her unrivalled happiness to possess. (in Padover, p. 350)
In a letter to John Taylor in 1816, Jefferson expressed the limitations of a republican form of government, and at the same time reinforced the importance of the mechanism whereby the general welfare is promoted:

... [republic] means a government by its citizens in mass, acting directly and personally, according to rules established by the majority. ... Such a narrow government is evidently restrained to very narrow limits of space and population. I doubt it would be practicable beyond the extent of a New England township. ... Our governments [the Federal Government] have much less of republicanism than ought to have been expected: in other words, that the people have less regular control over their agents, than their rights and their interests require. (in Padover, pp. 311-313)

The democratic principles contained in this letter were expressed by Madison in an article in the National Gazette, December 19, 1791: "Public opinion sets bounds to every government, and is the real sovereign in every free one" (in Padover, p. 347). Like Jefferson, Madison anticipated limitations to democratic functions with the size of the state in the same article:

The larger a country, the less easy for its real opinion to be ascertained, and the less difficult to be counterfeited; when ascertained or presumed, the more respectable it is in the eyes of individuals... The more extensive a country, the more insignificant is each individual in his own eyes. This may be unfavorable to liberty. (in Padover, p. 347)

John Stuart Mill (1806-1873) in an essay, "On
Liberty" (1859), stated the principle of social laissez faire:

... the sole end for which mankind are warranted, individually or collectively, in interfering with the liberty of action of any of their number, is self-protection. ... As soon as any part of a person's conduct affects prejudicially the interests of others, society has jurisdiction, and the question whether the general welfare will or will not be promoted by interfering with it, becomes open to discussion. (in Hutchins, pp. 271 and 303)

In an essay entitled "Representative Government" (1861) Mill added a familiar call for the ideal type of state:

... it is evident that the only government which can fully satisfy all the exigencies of the social state is one in which the whole people participate. ... But since all cannot, in a community exceeding a single small town, participate personally in any but some very minor portions of the public business, it follows that the ideal type of a perfect government must be representative. (in Hutchins, p. 350)

Mill echoed the founding fathers' desire for a direct method of promoting the general welfare along with the practical limitations at that time to direct participation by people in the affairs of a nation state.

In A Modern Utopia (1905) H. G. Wells (1866-1946) also stressed laissez faire principles for the achievement of freedom which is the purpose of the state:

There should be no positive compulsions
at all in Utopia, at any rate for
the adult Utopian—unless they fall
upon him as penalties incurred. (p. 4)

... the ... object that pervades
the whole Utopian organization [is]
a universal maximum of individual free-
dom. (p. 92)

Wells picked up on some of Karl Marx's (1818-1883)
communal property and anti-capitalist ideas, but fell
short of providing a model for a communist state. He
did, however, do something of the sort for the welfare
or socialist state:

It [the state] will insist upon every
citizen being properly housed, well
nourished, and in good health, reason-
ably clean and clothed healthily, and
upon that insistence its labour laws
will be founded. . . (p. 138)

The modern State. . . is taking over
the responsibility of the general
welfare of the children more and
more. . . (p. 182)

Wells' utopian state model included a ruling class called
samurai in which:

Practically all political power
rests. . . Not only are they the
administrators, lawyers, practising
doctors, and public officials of
almost all kinds, but they are the
only voters. (pp. 310 and 311)

In Utopia the general welfare of people was fostered not
by direct participation, but by the principles upon
which the state was founded and administered.

B. F. Skinner (1904-) presented a detailed utopian
community in Walden Two (1948). The purpose of this model
was a "... constitutional guarantee of a share in the wealth and life of the community" (p. 135). The method was a highly organized but relatively small communal group operating by the laws of behavioral engineering rather than according to any traditional ideas of democracy, economics, or family:

... we can now deal with human behavior in accordance with simple scientific principles... We can make men adequate for group living--to the satisfaction of everybody.

(p. 113)

In Walden Two the general welfare was promoted by people acting according to visions which had been designed beforehand to provide the "Good Life" and to induce people to act as if these were their own conceptions.

Current efforts which have as their stated purpose the promotion of people's general welfare include John Gardner's Common Cause, Ralph Nader's consumer oriented enterprises, Michael Harrington's writings and workings for a more equitable distribution of the nation's wealth, and the United Nations. A case can also be made that present religious societies, communes, and "back to the earth" movements are experiments in realizing the general welfare. Ecological, environmental, futurist, and world peace organizations also constitute active efforts for mankind's collective benefit.
The Contribution of the General Welfare Methodology

The background and some of the methods which have been advocated and used to promote the general welfare were described in the previous section. In order to compare these methods to the General Welfare Methodology (GWM), it is necessary to define the term methodology. Methodology has been defined by Hutchinson (1972) as "a systematic, standardized, operational set of rules and procedures for accomplishing a defined purpose." Thomann added to this definition:

A methodology can be looked at as an abstract but operational solution to a class of problems. It is abstract because it does not supply a specific solution to a specific problem but it supplies the means by which that specific solution is derived. It is operational because the steps by which the solution is arrived at are as prescriptive as possible. (1973)

This definition is meant to differentiate methodology from such terms as method, process, approach, system, or rules of thumb which, in common usage, do not encompass all of the attributes of the above definition. This is the way the term methodology will be used in this dissertation.

People's contributions to date for promoting the general welfare have run the gamut of rational, religious, political, economic, utopian, and real world based methods. Some of the efforts have been other worldly,
theoretically oriented inspirations which have been impossible to implement. Others have been philosophical rules of thumb meant to guide one through the confusion of existing models. Others have used pragmatic analysis of existing phenomena in order to arrive at a best possible community example. Still others have been attempts at making it possible to achieve a pressing purpose of the time.

The impact of these contributions on the course of history and on the attainment of their purposes has certainly been substantial even though problematic to measure. However, precious few of these models have produced viable methodologies which could be used to systematically promote the general welfare of a population. In spite of the quantity and diversity of past and present efforts, systematic, standardized, operational procedures have not often been generated.

The United States Constitution is one system which meets the criteria for being a general welfare methodology. The Constitution is a systematic attempt at setting up standardized rules and procedures by which, among other things, the general welfare of the people of the United States can be promoted. Because of the extent to which the Constitution spells out the rules and procedures for achieving its purpose, it can be argued that the Constitution is indeed a methodology. Practically speaking, the
the Constitution has served as a fairly dependable means of determining and carrying out the wishes of the population for which it was designed.

It would be safe to say, however, that in 1980, the Constitution no longer provides as close a representation of the needs and desires of the U.S. population as was the case when it was adopted in 1789. The ability of the Constitution to ascertain and promote the general welfare of all persons who consider themselves to be a part of the U.S. population, to the satisfaction of those same persons, is presently less clear than it was when the area of the country and the size of the population were smaller. Indeed, as was shown earlier in this chapter, Jefferson, Madison, and Mill all anticipated this problem.

A combination of factors now present different possibilities for the determination and promotion of the general welfare than have previously existed. Most importantly, communication techniques have become very sophisticated, and are in widespread use throughout the world. These techniques have made it possible for a large percentage of the population to become aware almost immediately of events in which they have an interest. Mass media has produced a more homogeneous human society, both nationwide and worldwide, than has ever existed before. Educational systems have added to this homogeneity with the most broadly based curriculums students have ever
experienced.

Another factor is that scientifically designed polling methods have made it possible to ascertain opinions of populations with reasonable accuracy. In addition to polling techniques, there exists the technology whereby the opinions of anyone with a telephone or appropriately modified radio or television set or some other two-way apparatus could be quickly and universally known. These technologies might provide a solution to the very problem which Jefferson, Madison, and Mill saw as making it impractical to have an ideal form of representative government in anything but a small town.

One more important factor bearing on the possibilities of promoting the general welfare is the analytic techniques now available which can provide a logical framework for the achievement of societal goals. The General Welfare Methodology (GWM) is one example of a class of analytic techniques called systems analysis. This Methodology attempts to solve a problem by breaking it into its parts according to wholistic and functional criteria. This is in contrast to an econometric model which calculates the whole as the sum of its parts. The GWM is not reductionist in nature. The intent of the Methodology is not to determine a best fit collective notion of the general welfare which could be generalizable to different populations. Rather, it is designed to be applicable for
specified populations, however large or small, which would determine their own visions.

The problem which necessitates the promotion of people's welfare can be thought of as gaps that exist between a population's collective understanding of desired conditions and the actual conditions at hand. Figure 1 presents a schematic representation of the primary functions of the GWM. This Figure can also be viewed as a diagram of past and present efforts to promote the general welfare of the population—the problem area of this dissertation. The problem of gaps, as described above, is also represented here.

Up to this point the nation state has been the primary type of population group referred to because this has been the major unit of those authors who form the historical background of this problem area. However, the Methodology is designed to be applicable for any definable and accessible population. It is in the field of education that the GWM has been applied.

The General Welfare Methodology has at least three important kinds of educational implications. First, the General Welfare Methodology can and has been used as a tool for solving problems in education. This Methodology was applied for a school in New York City in order to enable students, staff, and parents to conceptualize their visions about the school (Hodson, 1974a). The
Figure 1. A Diagram of the Primary Functions of the General Welfare Methodology.
redistribution of the school's resources in order to promote the general welfare of the school population had been the intent of the school directors for some time. The GWM provided the means for solving this educational problem. The implications for similar problem solving application are evident.

The second kind of educational implication is as an educational tool. This Methodology has been used in the classroom as a means for organizing students' perceptions of their own welfare (Hodson, 1974a). The Methodology enabled the students to tackle some of the problems involved in devising means of promoting their visions, and to resolve some of the conflicts which inevitably arise in dealing with different people's visions and limited resources. Use of the GWM in this kind of application has been shown to be practicable.

The General Welfare Methodology as an individual educational experience is the third kind of educational implication. The Methodology contains an educational component which calls for the individual to test out those visions and their implications which she or he has set forth. In addition, there are tests of completeness which require that the individual consider other people's visions to either accept, reject, or add items to her or his own list of visions.

Other procedures in the Methodology include ordering,
measurement, tests of logic, and decision making points which in themselves have broad educational implications for the individual as a member of a population with which she or he identifies and whose welfare she or he is actively involved in promoting. The educational implications here are as varied as there are persons.

The Problem Statement

The general problem area of the dissertation has been described as the ongoing attempts to ascertain and promote the well being or general welfare of people. An overview of past writings and present examples has served to set the framework within which any current attempt must be considered. Some factors were described which at this time present new possibilities for methods to promote the general welfare. The General Welfare Methodology was developed and tested in educational settings. The educational implications for the Methodology were outlined.

The problem which this dissertation will address is to further develop and field test a methodology which has as its purpose: "to promote the general welfare of the population."

The purposes of the study are to carry out activities to further develop Draft II of the GWM, to identify problems in the procedures of the Methodology, and to propose solutions to the problems identified. See Chapter III,
p. 58, for the specific goals of the field test. All of these purposes are appropriate for applied or decision oriented research since the intent is to generate data for use in modifying the GWM. This research will not be basic or conclusion oriented research because it is not the purpose of this study to provide data that will be generalizable, prove feasibility, or prove or disprove any hypothesis. While the author will be looking for serendipitous occurrences, any achievement of purposes other than those specified for this study will be coincidental and unintended.
CHAPTER I

DEVELOPMENT OF THE GENERAL WELFARE METHODOLOGY

The purpose of this study includes further development of a methodology which has as its purpose: "to promote the general welfare of the population." Prior to the work of this study, the General Welfare Methodology (GWM) had evolved to a state which can be seen in Draft II (pp. 28 - 31). This chapter presents a brief history of the Methodology, a description of the major processes, and an accounting of previous applications and further development undertaken prior to field testing.

History of the General Welfare Methodology - Drafts I and II

The General Welfare Methodology grew out of work that Professor Thomas E. Hutchinson, Dr. Richard T. Coffing, and others at the School of Education, University of Massachusetts, have done in developing methodologies to provide data for decision making in the social sciences, and for education in particular. Another source of input in the development of this Methodology was the course material and conversations this author had with Professor Stanley Young of the School of Business Administration, University of Massachusetts, concerning the functional analysis of social systems.
A draft of a methodology with a similar purpose and title to that of the General Welfare Methodology was produced by Dr. Coffing with input from Professors Hutchinson and Young in June of 1972. This draft consisted of six major steps with a first level breakdown of three sub-steps for one step. The title of this draft was the "Coffing-Hutchinson-Young Methodology for Promoting the General Welfare." An alternate title was given: "Coffing-Hutchinson-Young Methodology for Increasing the Value of the Constituent Persons." Albeit somewhat wordy this alternate title was a functional description of the Methodology's unstated purpose. The title also reflected the influence of systems analysis in its development. This draft became Draft I of the General Welfare Methodology. Figure 2 presents Draft I.

In November and December of 1972, this author produced Draft II. In addition to the contributions of the draft described above, and of the people who were involved with it, this author integrated related work which he was doing with the Needs Analysis, Evaluation, and Decision Making Methodologies at the time. This author has been the principal developer of the General Welfare Methodology for the past eight years.

Draft II was titled "The General Welfare Methodology." Its stated purpose was: "to promote the general welfare of the population." This purpose reflects not only the intended function of the Methodology, but also the broad
COFFING-HUTCHINSON-YOUNG METHODOLOGY FOR PROMOTING THE GENERAL WELFARE - Draft I - Dick Coffing - June 8, 1972

(Alternate title: C-H-Y Meth. for Increasing the Value of Organizational Decisions in Terms of the Personal Welfare of the Constituent Persons)

1.0 Identify the personal welfare of the constituent persons.

2.0 Determine to what extent the personal welfare of the constituent persons is unmet.

Simplex procedure for both Steps 1.0 and 2.0: use Coffing-Hutchinson Needs Analysis Methodology (and Coffing's Client Demand Identification Methodology, if appropriate).

3.0 Design or re-design methods (e.g., methodologies, programs, agencies) for meeting personal welfare of the constituents, given the results of 2.0.

4.0 Implement the methods.

5.0 Evaluate the implemented methods, using Fortune-Hutchinson Evaluation Methodology.

5.1 If welfare met, then re-evaluate periodically.

5.2 If welfare not met, then to go 3.0.

5.3 If welfare changes, then go to 1.0.

6.0 Repeat steps 1.0 and 2.0 as often as necessary to identify and/or determine unmet welfare.

Figure 2. Draft I of the General Welfare Methodology
scope of its applicability. The Methodology was written to be applicable for "the population" without limitations as to the specific subpopulation or type of organization for which it could be applied.

Draft II contained eight major steps with first level breakdowns for all but the last two steps. References were made to processes in other methodologies where the functional purpose of a particular substep could be readily served by steps which had previously been developed. The major steps were designed as a logical sequence of steps which could be applied as needed in a cyclical fashion to continually refine the accomplishment of its purpose. Figure 3 presents Draft II.

Description of the General Welfare Methodology - Draft II

This section is designed to provide the reader with the basic concepts, rationale, and procedures of the General Welfare Methodology (GWM). The major steps of the Methodology are presented in boxes to separate them from the text. The rationale explains the purposes of each major step with discussions of specific substep procedures as needed for clarification.

The two primary attributes of the GWM listed after the purpose in Draft II provide the first breakdown of this purpose: "to promote the general welfare of the
Purpose - to promote the general welfare of the population.

Attributes - to determine in a comprehensive, systematic, and continual process the visions of the population with respect to the best real world possible for everyone; to design programs to realize the visions of the population in such a way as to create a world in which the most number of the most important visions (according to the population) are realized.

Process -
1.0 Secure resources to promote the general welfare of the population.
   1.1 Determine how many resources—time, money, people—are available for this step and allocate the resources to the parts of this step.
   1.2 Promote the General Welfare Methodology.
   1.3 Obtain a service agreement or contract to undertake any part of the methodology.
   1.4 Allocate the secured resources to the other steps of the methodology for this particular application.
   1.5 Go back to step 1.2 until the resources for this step, 1.0, are used up, then proceed to step 2.0.

2.0 Determine the visions of the population.
   2.1 Determine how many resources are available for this step and allocate the resources to the parts of this step.
   2.2 Survey the population as directly as possible, given the resources available for this part, to obtain an answer from everyone to the question: What do you really want in the real world for yourself and for others?
   2.3 Test the visions for completeness.
   2.4 Verify the visions through some extensive educational processes involving as many cross-cultural experiences as possible for as many people as possible.
   2.5 Produce a list of the tested, verified visions.
   2.6 Determine how many people consider which

Figure 3. Draft of the General Welfare Methodology
visions on the list from step 2.5 to be among their five highest priority visions.

2.7 Produce a chart which would show the results of step 2.6, ordering the visions according to the numbers of people who chose each vision as one of their five highest, from the largest to the least numbers of people who chose each vision.

2.8 Proceed to step 3.0.

3.0 Define the visions of the population.
3.1 Determine how many resources are available for this step and allocate the resources to the parts of this step.
3.2 Choose the first (next) highest priority vision from step 2.7 which has not yet been defined.
3.3 Refer to the Fortune/Hutchinson Evaluation Methodology, specifically to the Operationalization of a Goal or Intent Process, for procedures to define the vision.
3.4 Go back to step 3.2 until the resources for steps 3.2 and 3.3 run out, then proceed to step 3.5.
3.5 Produce a list of the defined components of the visions from step 3.3.
3.6 Determine how many people consider which of the defined components on the list from step 3.5 to be among their five highest priority components.
3.7 Produce a chart which would show the results of step 3.6, ordering the defined components of visions according to the numbers of people who chose each component as one of their five highest, from the largest to the least numbers of people who chose each component.
3.8 Proceed to step 4.0.

4.0 Measure the extent to which the visions are unfulfilled.
4.1 Determine how many resources are available for this step and allocate the resources to the parts of this step.
4.2 Choose the first (next) highest priority component from step 3.7 which has not yet been measured.
4.3 Refer to the Coffing/Hutchinson Needs Analysis Methodology, specifically to the Measuring Process, for procedures to measure the extent
to which the component is unfulfilled.

4.4 Go back to step 4.2 until the resources for step 4.2 and 4.3 are used up, then proceed to step 4.5.

4.5 Amend the chart from step 3.7, using the data produced in step 4.3, to show to what extent these defined components of visions are unfulfilled, thus producing the List of Unfulfilled Visions (LUV).

Note: This LUV would only be an abbreviated visual representation of the data from step 4.3.

4.6 Proceed to step 5.0.

5.0 Match the available resources with the unfulfilled (components of) visions.

5.1 Determine how many resources are available for this step and allocate the resources to the parts of this step.

5.2 If there are resources from step 1.0 to maintain a program to promote the general welfare, go to step 6.0, otherwise proceed to step 5.3. Reallocate any unused resources to step 6.0.

5.3 Promote the General Welfare Methodology.

5.4 Promote the findings of steps 2.0-4.0 as shown partially in the List of Unfulfilled Visions (LUV) from step 4.5, in order to attract controllers of resources.

5.5 Match the controller of resources with the first unfulfilled component (unfulfilled for the largest number of people) from the List of Unfulfilled Visions which the controller is interested in promoting.

5.6 If the controller of resources has an operating program which he wants to gear to promoting an unfulfilled component, using the data from steps 2.0-4.0 of this methodology, go to step 6.0, otherwise proceed to step 5.7.

5.7 Obtain a service agreement or contract for promoting the general welfare, specifically one or more unfulfilled components of one or more visions.

5.8 Proceed to step 6.0.

6.0 Maintain a program to realize the unfulfilled visions of the population.

6.1 Determine how many resources are available for this step and allocate the resources among

Figure 3. (Continued)
the parts of this step.

6.2 Design a program to realize a particular unfulfilled component of a vision as defined in step 3.0 and as measured in step 4.0, and as contracted for in step 5.7.

6.3 Implement the program from step 6.2.

6.4 Evaluate the program with respect to the extent to which the unfulfilled component is still unfulfilled. Go back to step 4.3, then return to step 7.0.

7.0 Evaluate and revise the General Welfare Methodology with respect to a particular application of it in order to maximize the accomplishment of the purpose: to promote the general welfare.

8.0 Go back to step 1.0 periodically at some specific interval until all resources are used up or until the world becomes perfect.

Figure 3. (Continued)
population." The two attributes describe the two major subpurposes of the GWM. These subpurposes are further subdivided as the major steps. Steps 1.0, 7.0, and 8.0 are designed for the management of an application of the Methodology. Steps 2.0, 3.0, and 4.0 are further specifications of the first attribute:

   to determine in a comprehensive, systematic, and continual process the visions of the population with respect to the best real world possible for everyone.

Steps 5.0 and 6.0 are further specifications of the second attribute:

   to design programs to realize the visions of the population in such a way as to create a world in which the most number of the most important visions (according to the population) are realized.

Several definition statements are in order at this point. All steps of the GWM are written in sentences with an understood subject, the person responsible for implementing the Methodology. This person is called the applier. An implementation of the Methodology, or any part of it, for a particular population is called an application. The resources which are referred to are whatever materials, money, people, services, or any other entities which could be used to implement the step(s) in question. To allocate resources means to divide them among the required steps according to the needs of each
step. Components of visions are the specifying statements which are produced by defining the visions. The controller of resources is anyone who can make resources available for the promotion of the general welfare.

1.0 Secure resources to promote the general welfare of the population.

The purpose of this step is twofold: first, to obtain resources to propose the GWM as a means of promoting the general welfare of some group of people, and second, to obtain an agreement with a group of people for an application of the Methodology, or some part of it. This agreement would include a specification of the resources available. Step 1.0 contains two substeps, steps 1.1 and 1.4, which instruct the applier to allocate the resources obtained for the two purposes among other steps of the GWM. These steps are the substeps of step 1.0 and steps 2.0 through 7.0 for the two purposes respectively. The allocation of resources, for an application of the Methodology, serves as a "main resource allocation" for all the major steps for a particular application.

2.0 Determine the visions of the population.

The first substep of step 2.0 requires that the applier divide those resources available, as would have
been specified in the "main resource allocation" of substep 1.4, among the other substeps of this step. The following four major steps also have initial resource allocation substeps.

In order to achieve the purpose of determining people's visions, step 2.0 has three primary functional steps. In substep 2.2 people are asked to respond to an open ended question of the form: "What do you really want in the real world for yourself and for others?" This substep is designed to obtain vision statements from everyone in the population in their own words without any other input at this time. The original statements of people's visions form the basis for all subsequent procedures.

In substep 2.3 some other points of view are provided for consideration by people. The intent here is to have people consider other sources of visions and to accept or reject other ideas or to be stimulated by other ideas in order for each person to make her or his list of visions as complete as possible. In substep 2.4 this concept is taken one step further by having people undergo "extensive educational processes" in order for people to further consider just what their visions are. Step 2.0 is completed with procedures for listing all visions stated, having people pick their most important visions
from this combined listing, and then producing a list of the visions in priority order.

3.0 Define the visions of the population.

Given that people's visions were listed in their own words, in all likelihood the need exists for specifying at least some of those vision statements in terms of directly observable behaviors or states. This unambiguous specification is the purpose of step 3.0. The reasons for this need are that without this kind of specificity, 1) it is very difficult for people to agree on the meanings of vision statements, and 2) it is not possible to accurately measure the extent to which the visions are fulfilled or unfulfilled. Once the visions are defined, the resulting components of each vision are listed and ordered according to their importance as indicated by the population.

4.0 Measure the extent to which the visions are unfulfilled.

The purpose of step 4.0 is to determine the extent to which visions are present or absent, happening or not happening, at a point in time. The information obtained through this measurement process is needed for making decisions in later steps about which visions to promote. Step 4.0 makes reference to relevant procedures in other methodologies to help in the design and implementation of
measurement. Step 4.0 ends with a procedure which combines the priority order of visions and measurement results for use in the next steps.

5.0 Match the available resources with the unfulfilled (components of) visions.

Step 5.0 is designed to secure resources for the promotion of the visions which have so far been listed, defined, priority ordered, and measured. The first substantive procedure of this step is to determine if there are resources available for the promotion of visions as part of the agreement reached in step 1.0. If this is the case there is no need to proceed with the rest of step 5.0, and the applier proceeds to step 6.0.

If such resources are not available, then it is necessary to implement the other substeps which call for encouraging the use of the GWM and of the results from the application up to this point. The purpose of this is to persuade a controller of resources to choose one or more of the high priority unfulfilled visions for promotion. If the controller of resources does not have an existing program which she or he wishes to use for promoting the chosen visions, then an agreement must be obtained which specifies how the visions would be promoted. If the controller of resources does have such a program, then the applier proceeds directly to step 6.0.
6.0 Maintain a program to realize the unfulfilled visions of the population.

The applier has proceeded to step 6.0 from step 5.0 in one of three ways. Step 6.0 is used to design a new program if needed, or to redesign an existing program, in order to have a means of systematically achieving the chosen vision(s). In addition to the program design sub-step, step 6.0 has substeps for implementation and evaluation of the program.

7.0 Evaluate and revise the General Welfare Methodology with respect to a particular application of it in order to maximize the accomplishment of the purpose: to promote the general welfare.

This step, one of the management steps, is intended to provide an ongoing evaluation in order to make corrective revisions in the application. The evaluation of the program to promote the visions from step 6.0 would often be incorporated into the more general evaluation of step 7.0.

8.0 Go back to step 1.0 periodically at some specific interval until all resources are used up or until the world becomes perfect.

The purpose of this step is to have the applier periodically cycle back to the first step in order to
encourage the use of the GWM and to obtain agreements for applications of it. The potential exists for the apllier to have one or more applications in progress while also seeking additional ones. While the last phrase of this step holds out the unlikely possibility of a limiting circumstance, "until the world becomes perfect," the purpose of the Methodology, "to promote the general welfare of the population," will probably need to be promoted on an ongoing basis for some time to come.

Applications of Draft II

The first application of Draft II was at the Day School in New York City in February of 1973. Further applications were carried out with Day School seventh graders in January of 1974, and at the Division of Educational Planning and Management, School of Education, University of Massachusetts, in the spring of 1974. The results of these applications (Hodson, 1974a) showed that the General Welfare Methodology could be applied in different educational settings and that the Methodology could fulfill its stated purpose according to the people for whom it was applied.

These applications also indicated that considerable expertise on the part of the aplplier was needed to implement the steps and to manage the applications. It should be noted that two of the three applications were
limited to steps 1.0 through 4.0 whereby visions were
determined, defined, and measured to varying degrees of
completeness. The first Day School application included
parts of step 5.0 whereby certain resources were committed
for the purpose of promoting selected unfulfilled visions
of the Day School population. One purpose of these initial
applications was to gain information about the practicabi-
licity of the Methodology. They served this purpose, but
they also showed the need for a comprehensive field test.

To supplement the results of the applications, this
author sought critiques of the Methodology from lay per-
sons and experienced methodologists. These critiques
identified some procedural gaps such as the need for a
substep to delineate the particular population for each
application and the underdeveloped state of the verti-
fication/education substep (Hodson, 1974a). The critiques
were also used to help formulate three broad problems
related to the practicability and the potential for success
of the Methodology achieving its purpose (Hodson, 1974b).

The three problems were:

1. The need for conflict resolution
   procedures,

2. The need for mechanisms to bring
   about the promotion of people's
   visions once they are resolved,
   and

3. The need for evaluation of activ-
   ities which are intended to promote
   the visions.
Draft II contained some procedures which spoke to all three of these problems, but without further research it was not possible to assess how adequate they were.

This brief history has laid out the state of the General Welfare Methodology and its accompanying research at the time the plan for this dissertation was finalized (Hodson, 1976). Given standard methodological research practices at the time, and given examples of previous methodological research with similar problems (Hoagland, 1972; Coffing, 1973; Rosen, 1974), this author initially believed that the most fruitful course would be to carry out substantial further development of the Methodology through systematic gap analysis prior to field testing. Implementation of the dissertation study brought some changes to that original plan.

### Development Prior to Field Testing

As called for in the plan, the General Welfare Methodology was tested for gaps in order to identify problems existing in the Methodology. A gap was defined as a break in continuity. Benedict (1973) stated some of the kinds of gaps which may exist in a methodology:

1. A break in the logical progression of steps,
2. A missing element, step, or substep,
3. An incorrect ordering of an element, step, or substep,

4. An insufficient number of steps to accomplish a specific purpose or subpurpose,

5. A fuzzy concept, and

6. Unoperationalized purposes or steps (p. 31).

To this list this author added that gaps can also exist in the form of:

7. Inconsistent, redundant, unworkable, or impractical steps.

Testing for gaps was done through the following six methods. First, use was made of step VII of Metamethodology (Hutchinson and Thomann, 1975). This step is titled "Design Procedures," and contains steps for testing a methodology. These steps were used primarily as a test of completeness for this list of gap testing methods.

Second, use was made of Benedict's dissertation (1973), specifically of Chapter IV titled "Identification and Prioritization of Gaps." This Chapter helped to generate the list of kinds of gaps listed above.

Third, the following question from Metamethodology, along with Draft II of the General Welfare Methodology, were given to persons experienced in methodological development and to other persons familiar with the problem area:

Please critique the list of steps designed to accomplish the purpose:
"to promote the general welfare of the population," and point out those steps that you do not understand, steps you feel should be left out, and any steps, concepts and/or ideas you feel should be added. (Step VII. 13.b)

Fourth, a test of logic was performed which consisted of this author considering each step of the Methodology in terms of the overall purpose and of the subpurposes for each step.

Fifth, prior input relating to Draft II, as outlined in the previous section of this Chapter, was considered. Several gaps were identified through prior input. The following method was also a result of this information.

Sixth, other methodologies which have similar subpurposes, and hence similar steps, were used as tests of completeness for the General Welfare Methodology. The methodologies examined were the Evaluation, Needs Analysis, and Client Demand Methodologies.

The results of these gap tests fell into three categories:

1. Minor gaps such as grammatical errors, simple omissions, or incomplete definitions,

2. Major gaps which were true breaks in continuity, and

3. Gaps which were problem areas relating to the primary purpose or to subpurposes of the Methodology, as distinguished from breaks in continuity in the methodology itself.
Once the gaps were identified and listed, four criteria were used to determine whether or not changes were to be made in Draft II prior to field testing:

1. The importance of the gap with respect to the functioning of the Methodology,

2. The probable difficulty of developing a solution to the gap (the more difficult, the higher the priority),

3. The practicality of developing a solution to the gap, including what resources were available, and

4. The interests of the author.

Those gaps which passed these criteria were incorporated as changes in Draft II. The resulting draft was titled Draft IIa due to the relatively minor changes which were made at this time.

The first two types of gaps are presented according to the following format. On the left side of the page the step or substep which contains a gap is listed. Opposite the step the gap is stated along with a brief account of its disposition with respect to Draft IIa. Minor gaps are in lower case letters while major gaps are in upper case letters. Only those steps with gaps are listed. The gaps, major and minor, are numbered consecutively without reference to the Methodology's numbering system.
<table>
<thead>
<tr>
<th>Step</th>
<th>Nature of the Gap</th>
</tr>
</thead>
<tbody>
<tr>
<td>1.0</td>
<td>Secure resources to promote the general welfare of the population.</td>
</tr>
<tr>
<td></td>
<td>1. A SEPARATE MAJOR SET OF STEPS FOR OVERALL MANAGEMENT OF THE APPLICATION COULD BE USEFUL, ESPECIALLY FOR LARGE APPLICATIONS. THIS GAP WAS CONSIDERED TOO TIME CONSUMING AND NOT IMPORTANT ENOUGH FOR THE METHODOLOGY’S FUNCTIONING AT THIS TIME TO WARRANT ANY CHANGES. (SEE ALSO PROBLEM AREA NUMBER 1 IN THE FOLLOWING SECTION OF THIS CHAPTER.)</td>
</tr>
<tr>
<td>1.3</td>
<td>Obtain a service agreement or contract to undertake any part of the methodology.</td>
</tr>
</tbody>
</table>
|      | 2. THE TERM "THE POPULATION" WAS PURPOSEFULLY USED TO REPRESENT THE BROADEST POSSIBLE APPLICATION: THE WORLD’S POPULATION. HOWEVER ANY APPLICATION FOR A SUBSET OF THIS POPULATION WOULD NECESSITATE A SPECIFICATION OF WHO WOULD BE
2.2 Survey the population as directly as possible, given the resources available for this part, to obtain an answer from everyone to the question: What do you really want in the real world for yourself and for others?

2.7 Produce a chart which would show the results of step 2.6.

3. The question in this sub-step was written in the most general form. In order to provide a more realistic framework, an example was added to read as follows: "An example for a subset of the population would be: 'What do you really want for yourself and for others as a part of Jones College?'

4. In order to maintain correct parallel grammatical form, "least" was changed.
ordering the visions according to the numbers of people who chose each vision as one of their five highest, from the largest to the least numbers of people who chose each vision.

2.8 Proceed to step 3.0.

5. This step was omitted in Draft IIa since the procedure was a straight progression with no alternate conditional instructions, and therefore was deemed to be extraneous.

6. A technical point was raised concerning this step in that in a second round of defining, the applier may choose to ask people who could best define the vision. For example, one may choose qualified medical personnel to fully define a vision of
3.7 Produce a chart which would show the results of step 3.6, ordering the defined components of visions according to the numbers of people who chose each component as one of their five highest, from the largest to the least numbers of people who chose each component.

3.8 Proceed to step 4.0.

4.3 Refer to the Coffing/Hutchinson Needs Analysis Methodology, specifically to good health. Due to the excessive time needed to correct this minor gap at the level of Draft IIa, it was decided not to make any changes in this step at this time.

7. As with gap number 4, "least" should be changed to "smallest" in this step. An oversight resulted in this change not being made in Draft IIa.

8. As with gap number 5, this step was omitted as being extraneous.

9. A gap was identified for this step which made the point that measurement would be tricky
the Measuring Process, for procedures to measure the extent to which the component is unfulfilled.

4.5 Amend the chart from step 3.7, using the data produced in step 4.1, to show to what extent these defined components of visions are unfulfilled, thus producing the List of Unfulfilled Visions (LUV). Note: This

because of the lack of good social indicators. The Methodology referred to in this step contains procedures whereby the extent of fulfillment of almost any definable vision can be measured to the satisfaction of those who hold the vision. Therefore, the gap which exists is one of incomplete definition which this author did not feel warranted change in the Methodology at this time.

10. The incorrect reference to "step 4.1" was changed to "step 4.3" both times it appeared in this step.
LUV would only be an abbreviated visual representation of the data from step 4.1.

4.6 Proceed to step 5.0.

5.0 Match the available resources with the unfulfilled (components of) visions.

11. As with gap number 5, this step was omitted as being extraneous.

12. A GAP WAS IDENTIFIED WHICH ARGUED THE NEED FOR A BRIDGE BETWEEN SECURING THE VISIONS AND PROMOTING THEM. THIS STEP WAS DESIGNED AS ONE SUCH MECHANISM. WHILE NO CHANGES WERE CONSIDERED PRACTICAL FOR DRAFT IIa, THIS GAP IS DISCUSSED AS A PROBLEM AREA IN THE FOLLOWING SECTION OF THIS CHAPTER.

5.6 If the controller of resources has an operating program which he wants to gear to promoting an unfulfilled

13. In order to allow for multiplicity of programs, the word "program" at the end of the first line was changed to "program(s)."
component, using the data from steps 2.0-4.0 of this methodology, go to step 6.0, otherwise proceed to step 5.7.

5.8 Proceed to step 6.0.

7.0 Evaluate and revise the General Welfare Methodology with respect to a particular application of it in order to maximize the accomplishment of the purpose: to promote the general welfare.

14. Sexist language was corrected by changing the word "he" in the second line to "he/she."

15. As with gap number 5, this step was omitted as being extraneous.

16. THE GAP IN THIS STEP WAS THE FACT THAT TWO DIFFERENT SUBPURPOSES COULD BE ASCRIBED TO THIS STEP. IN ORDER TO CLARIFY THE PURPOSE INTENDED FOR THIS STEP, IT WAS REWRITTEN TO READ: "EVALUATE AND REVISE THIS APPLICATION OF THE GENERAL WELFARE METHODOLOGY IN ORDER TO MAXIMIZE THE ACCOMPLISHMENT OF THE PURPOSE: TO PROMOTE THE GENERAL WELFARE OF THE POPULATION."

17. HAVING LIMITED THIS STEP TO ONE SUBPURPOSE AS STATED
ABOVE, THE SECOND PURPOSE BECAME A GAP: THE NEED FOR A REDESIGN STEP FOR THE METHODOLOGY ITSELF. THIS WAS NOT ADDED TO DRAFT IIa BECAUSE OF ITS RELATIVE UNIMPORTANCE TO THE FUNCTIONING OF THE METHODOLOGY AT THAT TIME.

18. A functional gap exists in the sense that by the time the applier gets to step 7.0 it may be too late to effect any corrective change in this application. This gap should be taken care of by the training of the applier and/or by a set of management steps in the Methodology. Therefore, no changes were made. (See also problem area number 1 in the section following.)
The third type of gap, the related problem areas, were all beyond the scope of further development for Draft IIa according to all four of the criteria listed above. The five problem areas are listed with references to particular steps in the Methodology where applicable.

First, the need exists for a separate set of steps for the management of applications. This gap was stated as a major gap (number 1) for step 1.0. In addition to this step, a set of management steps would deal with the allocation and monitoring of all resources, with ongoing evaluation and revision of the application (step 7.0), with recycling functions including step 8.0, and, when practicable, with a redesign step (see gap number 17).

Second, a problem area which relates to all of the steps to one degree or another is the likelihood that some visions, or components of visions, will be incompatible or even mutually exclusive. Draft IIa includes two direct mechanisms and one indirect process which can help with this problem area. Step 2.4, the verification/education step, is meant to enable people to consider their own visions very carefully, especially in comparison with visions of people from different cultures. All of step 3.0, and in particular substep 3.3, is intended in part to clarify problems where they exist or to dispel problems where none really existed. This is the definition step.
In addition, at least indirectly, the recycle step, step 8.0, is designed to serve as a proving ground for people to reconsider their visions after they have had a chance to see some results of having their visions promoted, or not promoted. In an earlier paper (Hodson, 1974b) this author presented five other possible conflict resolution procedures. This problem area remains as one with which this Methodology and the human social system will have to deal for a long time to come.

Third, two aspects of the same problem area are related to the Methodology's purpose of promoting people's visions. The first is the possibility that the motives of the controller of resources may not be pure. The second is that the promotion contract, step 5.7, and/or some part of a promotion program may be illegal. The general problem area is one of controls. Controls need to be built into the management of an application both in terms of internal monitoring and in terms of integration with any external limiting factors. This problem area is common in human cultures, and it is reasonable to expect that it is one with which this Methodology will have to concern itself.

Fourth, the major gap number 12 which was presented earlier is also a broad problem area: How can people's visions (read also desires, needs) be integrated with
the various systems which have resources for promoting these visions. Steps 5.0 and 6.0 in the General Welfare Methodology are two ways of doing this. The author has presented other possible mechanisms for accomplishing this purpose (Hodson, 1974a). This problem area is central to the effective functioning of the General Welfare Methodology, and to the ability of people to improve the quality of their life.

Fifth, the need exists for a comprehensive compilation and analysis of people's efforts and thoughts which bear on the accomplishment of the purpose: to promote the general welfare of the population. The purpose of this would be to provide a useful perspective for an aplier of the General Welfare Methodology. A good portion of Chapter I of this dissertation addressed this problem area. More fruitful work in this area could certainly be accomplished.

Draft IIa is presented in its entirety in Appendix A. It is this form of the General Welfare Methodology which was field tested as described in Chapter III.

Decision to Field Test

The gap analysis yielded 13 minor gaps, five major gaps, and five related problem areas. Nine of the minor gaps and two of the major ones generated changes in the
Methodology. The remaining gaps and the problem areas identified did not lend themselves to further development according to the criteria set up beforehand. It was the opinion of the author at that time that there was not much practical benefit to be gained from further analysis or further development of the Methodology beyond Draft IIa prior to a field test.

At that time the state of the art of methodological development encouraged field testing at about the Draft II stage, as opposed to any extensive further development. This reinforced the argument for field testing the General Welfare Methodology. The Methodology had been scrutinized by several experienced builders of methodologies. It had been applied three times in limited but real situations. It had undergone one previous major revision to bring it to the Draft II stage. A relatively extensive gap analysis had yielded only the few additional changes incorporated into Draft IIa as detailed above. It was at this point that the investigator decided to field test Draft IIa.
CHAPTER III
PURPOSE AND DESIGN OF THE FIELD TEST

The basic rationale for the field test of this study was included in the last Chapter. Chapter III will present the intended function of a field test in general, and the specific design of this field test. The field test results for step 1.0 are presented as a part of the field test design.

**Purpose of a Field Test**

Metamethodology (Hutchinson and Thomann, 1975) lists some procedures to be performed prior to field testing which are designed to provide information for further development of a methodology. Included in steps VII.E through VII.I are two tests of logic and a test of completeness for the identification of gaps. In addition, there are two steps here for making changes in the methodology under development. Steps VII.J and VII.K read as follows:

J. Recycle to VII.A until you feel further applications of VII ["Design Procedures"] will not produce sufficient improvement to warrant spending of resources.

K. Before going to VII [field test procedures], write out a new draft of the methodology including all changes made to date as a result of VII. Mark this Draft II, your name, and date.
These procedures of step VII of Matamethodology provide a good theoretical summary of the activities described in Chapter II. It was an expanded version of the logic described in step VII.J which prompted the decision to field test the General Welfare Methodology.

In most respects the purpose of field testing a methodology is the same as the purpose of testing a methodology for gaps. The intent remains the generation of data for use in revising the methodology. The difference between these two types of endeavors is the procedures. Both could accurately be listed under the functional title of "procedures for further development." As this author sees it, the purpose of field testing a methodology is: to carry out decision oriented research in order to obtain information which will be useful for improving the methodology.

The decision about when to field test a methodology can be made by applying five criteria:

1. Would field testing be an efficient use of resources?

2. Is the methodology, or part of it, developed to the point where an application of it is practicable?

3. Is there a suitable site available for field testing?

4. If a site is available, are there sufficient resources to implement a field test at this site?
5. Will the interests of the investigator be served by doing the field test?

This investigator concluded that considering all five criteria, a field test was desirable. It was decided that problems with the GWM were most likely to come to light at this stage in its development through an actual application of it. Given that an earlier version of the GWM had previously been applied successfully by this investigator, Draft IIa should in all likelihood also be applicable. The investigator was able to secure a site for implementation, the Community College of Vermont, Southeastern Region (CCVSE). Both the investigator and the CCVSE Director, Nancy Chard, were willing to commit substantial resources for the application of the GWM at this site. Given the above factors, the investigator was very interested in doing a field test.

Goals of the Field Test

The goals which the investigator had for the field test are as follows:

1. To identify problems in the General Welfare Methodology,

2. To use the results of the field test to make recommendations for improving the Methodology, and

3. To apply the General Welfare Methodology in its entirety.
The means of measurement which the investigator would use to evaluate accomplishment of these four goals were a detailed log of the field test activities and a list of any recommendations made. The following section describes the field test log. The recommendations will be listed in Chapter V.

The Field Test Log

The field test log which is presented in Appendix B was the primary form for documentation of all activities, results, and problems encountered in the application of the Methodology. The log includes as attachments all letters, survey instruments, resource allocation charts, and other documents generated in the application. Items in the log were entered in chronological order rather than according to the numerical sequence of the steps. Attachments were numbered consecutively according to the sequence of their creation. The headings of the log, with brief explanations, are as follows:

1. The Date—that the activity took place,
2. The Step—of the Methodology to which the activity related,
3. What Actually Done—a description of the activities,
4. If Different from Step, Why?—an explanation of differences be-
between activities and the steps as written in Draft IIa,

5. Results—a description of the results of the activities, and

6. Problems—see the following paragraph.

For purposes of this study a "problem" was defined as anything which detered or detracted from the accomplishment of the Methodology's purpose, or the subpurposes of the steps. In order to make efficient use of the investigator's resources, and to aid in the achievement of goal number 1 of the field test, only "fundamental" problems which related to the functioning of the Methodology were listed. Little problems which were easily solved as part of the application were excluded. Problems which arose directly from circumstances within the field test site were also excluded unless they impinged on the application by using up resources. For example, minor scheduling problems were not included.

Design of the Field Test

Metamethodology states that, "the first field test should be done on the whole methodology under the simplest conditions" (step VII.A.1) and that, "succeeding field tests should be only slightly more complex than those previously conducted" (step VII.A.2). This field test was not the first application of the GWM, but
since it was the first formal field test, concepts from both these steps were applicable. Testing the Methodology in its entirety was one of the goals of the field test. On the other hand, the investigator felt that to restrict the application to "the simplest possible conditions" would make it very difficult to achieve the other two goals of the field test. It was decided, therefore, to apply the Methodology at a degree of complexity which would make it possible to achieve the three goals listed above. Outside of this consideration, simplicity would rule.

Notwithstanding the considerations mentioned above, there was one factor which played a key role in this application, as it does with any application of a methodology, the availability of resources. Appropriately and necessarily the first step of the GWM deals with the purpose: "[to] secure the resources to promote the general welfare of the population."

Up to this point the field test design has been general. The design becomes specific with the implementation of step 1.0 of the Methodology. The step includes the specification of resources, population, and agreements for the application. These results are presented with the other field test results in Chapter IV.
CHAPTER IV
FIELD TEST RESULTS AND DISCUSSION

Chapter IV presents the field test results for steps 1.0 through 7.0 of the General Welfare Methodology (GWM). These are the initial planning step and the major application steps of the Methodology which were implemented at the Community College of Vermont, Southeastern Region (CCVSE). In addition, a brief description of step 8.0, the recycle step, is included in this Chapter.

The format for this presentation is as follows. Each step and substep is stated as it appears in Draft IIa, separated from the text by a box. A narrative of the activities and results for each step is organized according to the dates each set of activities occurred. A discussion of the results includes an analysis of any differences or problems which occurred in implementing the steps as written.

The reader can refer to the field test log and its attachments (Appendix B) for the original form of the documentation for each step.

Results of Step 1.0

1.0 Secure resources to promote the general welfare of the population.

1.1 Determine how many resources—time, money, people—are available for this step, and allocate the resources to the parts of this step.

62
09-01-80. The resources of this investigator were determined and listed. These were as follows:

1. Time of the investigator as applier for step 1.0: 2 hours,
2. Time of the investigator as applier for entire application of the GWM: 10 hours per week, and
3. Timeline for the application: September through December, 1980.

09-02-80. The Applier called Nancy Chard, Director of the Community College of Vermont, Southeastern Region (CCVSE) to set up a meeting to discuss the particulars of a field test at CCVSE. It should be noted that the investigator had previously contacted the CCVSE Director to update the preliminary confirmation of CCVSE as the field test site which was given at the time of the dissertation proposal. The result was that a one hour meeting between the applier and the CCVSE Director was set for 09-11-80.

Discussion. There was some confusion about the necessary activities for step 1.1 arising from the fact that step 1.0 encompasses two purposes: 1) to promote the General Welfare Methodology as a means of promoting the general welfare of the population, and 2) to negotiate an agreement to apply the GWM. This proved to be a minor problem in that the investigator had to determine the dual nature
of step 1.1 before he could determine what resources were needed for what purposes. Note that this duality is relected in the resources for this step.

1.2 Promote the General Welfare Methodology.

09-11-80. The applier explained the GWM and the possible benefits to be derived from its application at CCVSE to the CCVSE Director. The Director expressed much enthusiasm for the application of the GWM at CCVSE.

Discussion. This step embodies the first purpose of step 1.0. No differences or problems with the activity to accomplish this step were experienced.

1.3 Obtain a service agreement or contract to undertake any part of the methodology: include specification of a population for this application if it is to be a subset of the world population.

09-11-80. The applier asked the CCVSE Director what resources were available at CCVSE for an application of the GWM. The applier asked the CCVSE Director what sub-populations, with what numbers of people in each, made up CCVSE. The applier provided a test of completeness for resources listed by the CCVSE Director. The applier and the Director worked out a reasonable population for this application, resources to be made available by CCVSE.
and by the applier, and a timetable. The CCVSE Director agreed to an application of the GWM at CCVSE. A meeting to explain this application and to present the initial open ended question (see step 2.2) to the staff of CCVSE was set for 09-16-80.

The results of these activities included the following:

1. A verbal agreement to apply the GWM at CCVSE was obtained;

2. A core of 15 returning CCVSE teachers and all 10 staff members were specified as the population for this application;

3. Resources were secured and specified:
   a. 1½ hour per staff member or teacher,
   b. 4 hours of CCVSE Director time,
   c. 10 hours per week of applier's time,
   d. Typing at CCVSE, within reason with one week lead time,
   e. ½ hour at several staff meetings,
   f. Mailings through CCVSE,
   g. Copying at CCVSE, and
   h. All above resources through December, 1980; and

4. A list was obtained of the 15 teachers with names and addresses.

Discussion. This step is essentially the implementation
of the second purpose of step 1.0. The initial list of the CCVSE population for this semester included 800 students, 100 of whom were degree students, 10 staff members from two different sites, and 45 teachers. The applier and the CCVSE Director agreed that staff and teachers made up a good population for an initial application of the GWM at CCVSE. However, in the interest of simplicity and conservation of resources, the applier stated that 55 people was stretching the limits for this application. The CCVSE Director then stated that 15 of the 45 teachers were the "core" teachers in the sense that they had all taught courses in previous semesters. The applier and the CCVSE Director agreed that the 10 staff members and 15 core teachers made up a good and practical population for this application.

The number of important activities which were carried out as parts of this step suggest that a second level of breakdown for this step could be useful, particularly for more complex applications. This was a small problem for the applier for this application because some time was required to determine a set of activities to accomplish this step.

1.4 Allocate the secured resources to the other steps of the methodology for this particular application.
09-18-80. The applier allocated the resources secured in step 1.3 to the major steps (2.0-7.0) of the GWM for this application. The resulting Resource Allocation Chart is presented in Figure 4. The eight categories of resources are the same as those listed for step 1.3 above. The first three resources are listed in hours; the next four are broken down into the number of times each is to happen; the last is in terms of weeks and calendar dates. Step 8.0 of the GWM, the recycle step, was not allocated any resources since in its general form ("recycle to step 1.0") this step is not appropriate for field testing. See Chapter IV for a discussion of step 8.0 as it relates to this field test.

Discussion. Since there are no procedures specified for organizing resources into a resource allocation, nor is there an example of a resource allocation in the GWM, some time had to be spent by the applier seeking out such procedures and examples from other methodologies. Because of this, a minor problem could be ascribed to this step.

Results of Step 2.0

2.0 Determine the visions of the population.

2.1 Determine how many resources are available for this step, and allocate the resources to the parts of this step.

09-18-80. The applier referred to the Main Resource Allo-
## Resource Allocation Chart

**For Step: 1.4**  
**Date:** 09-18-80

<table>
<thead>
<tr>
<th>Step</th>
<th>a. CCVSE pop. time</th>
<th>b. CCVSE Dir. time</th>
<th>c. Appl'r time</th>
<th>d. Typing</th>
<th>e. Staff mtgs.</th>
<th>f. Mailings</th>
<th>g. Copying</th>
<th>h. Timeline</th>
</tr>
</thead>
<tbody>
<tr>
<td>2.0</td>
<td>(\frac{1}{2}) hr</td>
<td>(\frac{1}{2}) hr</td>
<td>40 hrs</td>
<td>5 docu</td>
<td>2</td>
<td>3</td>
<td>5 docu</td>
<td>4 weeks, by Oct. 10</td>
</tr>
<tr>
<td>3.0</td>
<td>1/3hr</td>
<td>1/3hr</td>
<td>20 hrs</td>
<td>4 docu</td>
<td>1</td>
<td>2</td>
<td>4 docu</td>
<td>2 weeks, by Oct. 24</td>
</tr>
<tr>
<td>4.0</td>
<td>1/3hr</td>
<td>1/3hr</td>
<td>10 hrs</td>
<td>1 docu</td>
<td>0</td>
<td>1</td>
<td>1 docu</td>
<td>1 week, by Oct. 31</td>
</tr>
<tr>
<td>5.0</td>
<td>0</td>
<td>2/3hr</td>
<td>10 hrs</td>
<td>0</td>
<td>1</td>
<td>0</td>
<td>1 docu</td>
<td>1 week, by Nov. 7</td>
</tr>
<tr>
<td>6.0</td>
<td>0</td>
<td>1(\frac{1}{2}) hr</td>
<td>50 hrs</td>
<td>1 docu</td>
<td>2</td>
<td>1</td>
<td>1 docu</td>
<td>5 weeks, by Dec. 12</td>
</tr>
<tr>
<td>7.0</td>
<td>1/3hr</td>
<td>2/3hr</td>
<td>10 hrs</td>
<td>1 docu</td>
<td>1</td>
<td>1</td>
<td>1 docu</td>
<td>1 week, by Dec. 19</td>
</tr>
<tr>
<td>8.0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
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<td>0</td>
<td>—</td>
</tr>
</tbody>
</table>

Figure 4. The Main Resource Allocation Chart.
cation Chart (Figure 4) to determine what resources were allocated for step 2.0. These resources were then broken down and allocated among the substeps of step 2.0. The result was the Resource Allocation Chart for Step 2.0 which is presented in Figure 5. The format of this resource allocation chart (RAC) is the same as that for the first chart presented in Figure 4.

Steps 2.3 and 2.5 were not allocated any resources separately because these steps and their resources were combined with steps 2.6 and 2.7 respectively. Refer to the sections in this Chapter for steps 2.3 and 2.5 for discussions of these combined steps. Step 2.4 was not allocated any resources because the applier reasoned that for the sake of simplicity and because of limited resources, "extensive educational processes" were beyond the scope of this application. While this was indeed the case, the section below for step 2.4 documents a serendipitous result for this step.

Discussion. As with step 1.4, there was no explanation (procedures or examples) of how to perform an allocation of resources. Indeed, there were no such procedures or examples in any of the resource allocation substeps, substeps 2.1, 3.1, 4.1, 5.1, and 6.1. Since the applier had studied relevant procedures and examples from other methodologies for use in step 1.4, the activities for step
### Resource Allocation Chart

**For Step 2.0**

<table>
<thead>
<tr>
<th>Step</th>
<th>a. CCVSE pop. time</th>
<th>b. CCVSE Dir. time</th>
<th>c. Appl'r time</th>
<th>d. Typing</th>
<th>e. Staff mtgs.</th>
<th>f. Mailings</th>
<th>g. Copying</th>
<th>h. Time-line</th>
</tr>
</thead>
<tbody>
<tr>
<td>2.2</td>
<td>½ hr</td>
<td>½ hr</td>
<td>20 hrs</td>
<td>1 docu</td>
<td>1</td>
<td>1</td>
<td>2 docu</td>
<td>2 weeks, by Sep. 27</td>
</tr>
<tr>
<td>2.3</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>This step was combined with step 2.6.</td>
</tr>
<tr>
<td>2.4</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>—</td>
</tr>
<tr>
<td>2.5</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>This step was combined with step 2.7.</td>
</tr>
<tr>
<td>2.6</td>
<td>½ hr</td>
<td>½ hr</td>
<td>20 hrs</td>
<td>2 docu</td>
<td>1</td>
<td>1</td>
<td>2 docu</td>
<td>2 weeks, by Oct. 8</td>
</tr>
<tr>
<td>2.7</td>
<td>0</td>
<td>0</td>
<td>10 hrs</td>
<td>1 docu</td>
<td>0</td>
<td>0</td>
<td>1 docu</td>
<td>1 week, by Oct. 10</td>
</tr>
</tbody>
</table>

**Figure 5.** The Resource Allocation Chart for Step 2.0.
2.1 and the other resource allocation substeps did not constitute a serious problem. Previous training and experience allowed the applier to provide an ad hoc solution to the problem. See Chapter V for further discussion and recommendations relating to this problem.

2.2 Survey the population as directly as possible to obtain an answer from everyone to the following type of question: "What do you really want in the real world for yourself and for others?" An example for a subset of the population would be: "What do you really want for yourself and for others as a part of Jones College?"

09-15-80. The applier produced and typed the initial open ended question instrument. It can be seen in Appendix B, Attachment 1. The question was as follows:

WHAT DO YOU REALLY WANT FOR YOURSELF AND OTHERS AS A PART OF THE COMMUNITY COLLEGE OF VERMONT, SOUTHEASTERN REGION?

09-16-80. The applier explained the GWM and its planned application at CCVSE to the eight staff members present at the meeting. Two staff members were absent. The open ended question instrument was handed out, and a deadline of 09-18-80 was set for handing in responses to the question at the CCVSE office. The applier set the same date with the CCVSE Secretary, Mary Zabriskie, as a deadline for getting out a mailing with the open ended
question instrument to the 15 core teachers. The applier wrote a cover letter to the teachers to be included with the instrument.

One result of these activities was a commitment from the staff to cooperate with this application. Considerable discussion took place regarding the Methodology, its relation to other systems analysis techniques used by education enterprises, the mechanisms of the GWM which were to be used at CCVSE, and the anticipated benefits of this application. Another result was the cover letter to teachers which can be seen in Appendix B, Attachment 2.

09-18-80. The applier checked at the CCVSE office for staff responses to the open ended question and for the status of the teacher mailing. The applier found that two out of eight responses had been turned in and that the cover letter had been typed but the mailing was not out.

The applier put an open ended question instrument in the intraoffice box of one of the staff members absent at the 09-16-80 meeting. It was decided to include the other absent staff member with the teacher mailing since she was from the satellite office. The applier then talked informally with three staff members, who were available at the time, to encourage them to respond. A new deadline was set for 09-24-80, and this was communi-
cated to all staff through the Secretary. The applier also talked with the Secretary about getting out the teacher mailing. The only immediate results of these activities were promises by staff members to turn in their responses and by the Secretary to get out the mailing "as soon as possible."

09-24-80. The applier again checked at the CCVSE office for staff responses and for the status of the teacher mailing. Five of nine instruments had been returned. The mailing had gone out the day before. The applier then talked with the CCVSE Director about the difficulty of getting back responses. The Director instructed the Secretary to ask all staff members if they had responded, and if not, to do so by 09-29-80. The deadline for teachers to turn in their responses was set in the letter for 10-06-80.

10-03-80. The applier checked in at the CCVSE office to pick up responses and to schedule the next stage of the application, steps 2.3 and 2.6 combined. Four more responses were obtained, making a total of nine. Two of these responses were from teachers. Testing the visions for completeness and priority ordering were scheduled for the 10-14-80 staff meeting.

10-07-80. One more response was obtained, making a total
of 10.

10-14-80. One final response was obtained, making a total of 11. Nine responses were from staff members, two from teachers. Since one staff member had left the College since the start of this step, all present staff members responded. Only two out of the 15 teachers (13%) had done so.

Discussion. Although the activities for this step stretched out over one month, the nature of the activities was not complex. None of the activities performed were different from the way step 2.2 was written. Therefore there was not a problem with this step in terms of its specificity or level of breakdown. One problem noted in the log was the delays encountered in obtaining responses to the first instrument. While these delays used up very little additional time in terms of the hours which had been allocated for this step, in terms of the elapsed time the delays set the timetable back by about two weeks. This problem is similar to that found by Thomann (1976) in her field test of the Needs Analysis Methodology. Another problem identified was the absence of procedures in the Methodology to deal with non-respondents. The following section for the combined steps 2.3 and 2.6 presents further material relating to this second problem. It should be noted that all teachers at CCVSE work there only on a part time basis. Also, most of the teachers have
have other full time jobs. These employment characteristics are most likely important factors in their non-cooperation with the additional tasks of this application.

Attached to the last response to the open ended question was a note which summed up the comments received by the applier regarding this first stage of the application. The note read, "Alan, Sorry I'm so late with it. It's a wonderful process of reflection on one's work and well-being."

<table>
<thead>
<tr>
<th>2.3 Test the visions for completeness.</th>
</tr>
</thead>
<tbody>
<tr>
<td>AND</td>
</tr>
<tr>
<td>2.6 Determine how many people consider which visions on the list from step 2.5 to be among their five highest priority visions.</td>
</tr>
</tbody>
</table>

10-12-80. The applier produced a first draft of an instrument to accomplish the purposes of steps 2.3 and 2.6. This first draft was developed using the responses to the open ended question which were available to the applier at that time. The purposes of the instrument were twofold: 1) to provide a simple and quick test of completeness for the visions and 2) to determine the order of importance of the visions according to the population.

10-14-80. The above draft was shown to another builder of methodologies for comments. The resulting critique generated changes which yielded the final draft of the
second instrument. This instrument can be seen in Appendix B, Attachment 5. The applier added to this instrument the visions of the last respondent and then distributed it to the staff members at the meeting. All staff present completed and handed in the instrument before the end of the meeting. Two visions were added to the list as a result of the test of completeness activities of this instrument. One instrument was left in the box of the one staff member who was not present at the meeting.

10-21-80. The applier wrote, typed, and copied a letter to the teachers to be included with the second instrument. See Appendix B, Attachment 6 for a copy of this letter. Copies of Draft IIa of the GWM were also included in this mailing in response to a request for a copy from one teacher, and in the hope of increasing cooperation from the teachers to return this instrument. The stated return deadline was 10-28-80. The applier also inserted all of the materials in envelopes. The result was that the letters went out the next day.

10-29-80. The applier went to the CCVSE office to pick up teacher responses. One response was obtained.

11-04-80. The applier picked up two more teacher responses and the response from the staff member who was absent at the meeting of 10-14-80. The applier talked with the CCVSE
Director about the problem of non-response from the teachers. The Director suggested two possible solutions:
1) call up the teachers to encourage them to respond and/or
2) invite the teachers to attend the staff meetings at which the GWM would be applied. For reasons of simplicity and limited resources it was decided to try the latter solution. It was arranged for the teachers to be invited to the meeting for the next stage of the application on 11-18-80.

Discussion. The applier combined the test of completeness step, step 2.3, with the step designed to determine the priorities of the visions, step 2.6, for several reasons. The most important reason was to conserve resources and thereby to enhance the probability that the Methodology would achieve its purpose. As stated above the application was already about two weeks behind schedule. It was obvious to the applier that two separate applications of two different instruments as called for by these two steps would severely tax the resources and quite possibly the needed cooperation of the staff. Also, these two steps could easily be combined into one instrument without the instrument becoming too complex to be implemented at one staff meeting. Another reason, which underlies the ones stated above, was that at the level of resources of this application, only quick and simple tests of completeness
could be implemented.

One problem which occurred in the combined application of these steps was that the two visions added to the list of visions were not added to everyone's lists before the priority ordering steps of the instrument were performed. This could easily have been done in order to have the added visions considered by everyone for the second purpose of the instrument. However, this became evident only after the fact.

There was one other difference in the way step 2.6 was applied from the way it was written. This difference was not discovered until the tabulated results from this step were considered for use in producing a chart of the results for step 2.7. At that time the applier found that instead of only determining the "five highest priority visions" as called for in step 2.6, the respondents had also been asked on the instrument to "check those visions which you feel are also visions of yours." The result was a more detailed priority ordering of visions than called for in step 2.6.

Even though the reasons this difference occurred were obviously not premeditated, they were, in retrospect, logical. The main reason was one of habit since the applier was accustomed to producing and administering instruments for other methodologies which included this checking procedure. Also, the more detailed priority
ordering is especially useful with small populations to avoid tied ranks in the priority ordering. Checking the visions helped to accomplish one of the purposes of the instrument, to test the visions for completeness. Checking necessitated closer consideration by people of each vision to determine if the vision was one of theirs. The applier therefore considered this difference a "happy accident."

The problem of few teachers responding to the first two instruments was at least partially solved by talking with the CCVSE Director and inviting the teachers to the next application meeting. However, it was not clear to the applier that all possible solutions had been considered or that the chosen solution was necessarily the best one for this application. What was obvious was the Methodology needed procedures to deal with this type of problem.

2.4 Verify the visions through some extensive educational processes involving as many cross-cultural experiences as possible for as many people as possible.

10-14-80. The applier intended to skip this step because of the reasons given above. However, in implementing steps 2.3 and 2.6 some of the intent of step 2.4 was achieved. At this meeting the applier explained the purpose of the second instrument (from steps 2.3 and 2.6). The instrument was then handed out and explained. The
four instructional steps of this instrument were as follows:

1. Read the list of visions;
2. If you think of other visions, add them at the end of the list;
3. Go back and check those visions which you feel are also visions of yours, whether or not you wrote them, and
4. Go back and circle the five (5) numbers of your five highest priority (most important) visions.

In the process of doing the first three steps, the staff engaged in some very lively and lengthy discussions among themselves concerning the listed visions.

Discussion. This activity and its result were different both from the way step 2.4 was written and from the way this application was planned. This was another serendipitous occurrence which yielded a positive result for the attainment of the purpose of this step. This unexpected result demonstrated that step 2.4 could be implemented at least to this degree in this kind of an application.

2.5 Produce a list of the tested, verified visions.

AND

2.7 Produce a chart which would show the results of step 2.6, ordering the visions according to the numbers of people who chose each vision as one of their five highest, from the largest to the smallest
numbers of people who chose each vision.

10-21-80. The applier planned the combined implementation of these steps. It was decided to include the information from the check marks in tabulating and reporting the results of the second instrument.

11-10-80. The applier tabulated and recorded the vision priorities from the instrument. The results were broken down by staff, teacher, and combined responses.

11-16-80. The applier produced a final list, including the priority rating for each vision. This was done on a blank copy of the instrument. Only the combined teacher and staff responses were listed. The results can be seen in Appendix B, Attachment 9.

Discussion. The combining of steps 2.5 and 2.7 was done because of the previous combination of steps 2.3 and 2.6. Since steps 2.3 and 2.6 were combined, step 2.5 was not implemented separately because there were no separate results from steps 2.3 and 2.4 which would be needed.

The final list of priorities combined teacher and staff responses because there were so few replies from teachers (three) and because there was little difference between the results of the two groups of respondents.
Four considerations lead to the decision to include data gained from the check marks in the results:

1. The altered step 2.6 procedures yielded more data than would be produced by the step as written in Draft IIa,

2. The more complete information would better serve the purposes of step 2.7,

3. No further use of resources was required, and

4. The more complete information would be useful to the CCVSE Director in step 3.0, the defining process.

See also the section for step 3.0 in this Chapter for further activities and discussion of this last consideration. The applier decided to list the vision priorities on the instrument rather than "produce a chart" as called for in step 2.7 for the sake of simplicity and conservation of resources, as well as the belief that this would achieve the purpose of step 2.7.

Results of Step 3.0

| 3.0 Define the visions of the population. |
| 3.1 Determine how many resources are available for this step, and allocate the resources to the parts of this step. |

11-10-80. The applier allocated the resources available for step 3.0, as listed on the Main Resource Allocation Chart, among the substeps of this step. A blank format
was developed for use with this step and with similar
resource allocation steps. The Resource Allocation Chart
for Step 3.0 is presented in Figure 6.

**Discussion.** Several things happened with the production
of this Resource Allocation Chart (RAC). As with step
2.0, limited resources made some combinations of steps
desirable. More will be said about the reasoning for
particular combinations in the discussions for the specific
steps. As a time saving device, a blank format was devel-
oped which could be copied and filled in for all resource
allocation steps of the Methodology except for the main
resource allocation of step 1.4. The combination of steps
meant that not all of the resources for step 3.0 needed to
be allocated to the remaining substeps. Because of this
the timeline was collapsed by about one week, and an
accounting of extra resources was written in at the bottom
of each column for each kind of resource as appropriate.
The need for a systematic way of keeping track of the use
of resources and of adjusting future resource allocations
to take this into account, resulted in the development of
the expanded RAC as seen in Figure 6. Rows were added so
that the following could be recorded:

1. Credits or debits of resources from
   previous steps,

2. Original allocations of resources and/or
   modifications for this step (from the
   main RAC or subsequent alternation),
<table>
<thead>
<tr>
<th>Credits or (Debits)</th>
<th>a. CCVSE pop. time</th>
<th>h. CCVSE Dir. time</th>
<th>c. Appl'rs time</th>
<th>d. Typing time</th>
<th>e. Staff mtgs.</th>
<th>f. Mailings</th>
<th>g. Copying</th>
<th>h. Time-line</th>
</tr>
</thead>
<tbody>
<tr>
<td>Allocs. or (Changes)</td>
<td>1/3hr</td>
<td>1/3hr</td>
<td>20 hrs</td>
<td>4 docu</td>
<td>1</td>
<td>2</td>
<td>4 docu</td>
<td>2 weeks, by Oct. 24</td>
</tr>
<tr>
<td>Totals Now Available</td>
<td>1/3hr</td>
<td>1/3hr</td>
<td>20 hrs</td>
<td>4 docu</td>
<td>1</td>
<td>2</td>
<td>4 docu</td>
<td>2 weeks, by Oct. 24</td>
</tr>
<tr>
<td>Step: 3.2</td>
<td>This step was combined with step 3.3.</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>3.3</td>
<td>1/3hr</td>
<td>1/3hr</td>
<td>10 hrs</td>
<td>1 docu</td>
<td>1</td>
<td>0</td>
<td>1 docu</td>
<td>1 week, by Nov. 17</td>
</tr>
<tr>
<td>3.4</td>
<td>This step was combined with step 3.3.</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>3.5</td>
<td>0</td>
<td>0</td>
<td>2 hrs</td>
<td>1 docu</td>
<td>0</td>
<td>0</td>
<td>1 docu</td>
<td>1 day, by Nov. 18</td>
</tr>
<tr>
<td>3.6</td>
<td>This step was combined with steps 4.2-4.4.</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>3.7</td>
<td>This step was combined with step 4.5.</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Totals Used</td>
<td>1/3hr</td>
<td>1/3hr</td>
<td>12 hrs</td>
<td>2 docu</td>
<td>1</td>
<td>0</td>
<td>2 docu</td>
<td>18 days, to Nov. 18</td>
</tr>
<tr>
<td>Credits or (Debits)</td>
<td>0</td>
<td>0</td>
<td>8 hrs</td>
<td>2 docu</td>
<td>0</td>
<td>2</td>
<td>2 docu</td>
<td>(10 days)</td>
</tr>
</tbody>
</table>

Figure 6. The Resource Allocation Chart for Step 3.0.
3. Totals of the first two categories, yielding the totals of resources available for this step at the time this RAC is filled in,

4. Totals of resources which were used in the implementation of this step, and

5. The net credits or debits of resources which would be transferred to the first row in the RAC for the next step.

While this may seem like unnecessary detail, the applier found these additional procedures to be very useful for the management of the application. Once the format was developed, it was applicable for all the other resource allocation steps, and the applier found it easy to fill in these new RAC's.

| 3.2 Choose the first (next) highest priority vision from step 2.7 which has not yet been defined. |
| AND |
| 3.3 Refer to the Fortune/Hutchinson Evaluation Methodology, specifically to the Operationalization of a Goal or Intent Process, for procedures to define the vision. |
| AND |
| 3.4 Go back to step 3.2 until the resources for steps 3.2 and 3.3 run out, then proceed to step 3.5. |

10-28-80. The applier planned how to implement these steps. The impetus for this planning came from the realization that the amount of resources for this step precluded
defining all the visions. The result was a decision to ask the CCVSE Director to choose a maximum of four of the highest priority visions which she would be interested in promoting.

11-11-80. The applier referred to the Fortune/Hutchinson Evaluation Methodology to produce a first draft of a procedure whereby the defining process could be implemented.

11-12-80. The applier conferred with another builder of methodologies concerning the draft process. Some changes were made, resulting in the following revised procedure:

At a meeting with teachers and staff, after the Director has selected four high priority visions for promotion:

1. The applier explains this stage of the GWM,

2. The applier states the purpose of defining,

3. The applier explains why four high priority visions were chosen for defining,

4. The visions to be defined are stated,

5. Staff and teachers are asked to group themselves according to which vision they would like to define. If there are not at least two people for each vision, people are asked to switch from the large to the small groups.

6. The applier asks each person to "Imagine that you have this vision to the fullest extent possible. Write down those things which indicate to you that it is present and/or happening in the most ideal way," and
7. The group is asked to consider and produce a final list of components.

11-17-80. The applier met with the CCVSE Director to present the visions and their priorities. It was explained that since all visions could not be defined, at least the first time around, it was desirable for her to choose four visions for defining which she would be interested in promoting. The Director did not simply choose four visions from the list. She chose two visions directly from the list, but combined several other similar visions to create her two other choices. The Director specified that the staff/teachers at the meeting should be able to make changes in which visions would be defined. The applier therefore amended item 3 from the above list to read:

3. (Amended) the applier explains why four visions need to be chosen for defining, then states the visions chosen by the Director, then asks if anyone wants to make any changes. If needed, a process is devised for choosing which four visions among a larger number chosen should be defined.

11-18-80. At the staff meeting the applier implemented the procedure as amended. The staff added one vision to the list of those they wanted to define. Since there were only eight people at the meeting (seven staff, one teacher) and since at least two people were needed to define each vision, the applier decided to have the staff and teacher vote for three visions to be defined. The
three visions receiving the most votes were then defined according to the revised process. The provision in item 5 for equalizing the groups was used successfully. The next steps (steps 3.6 and 4.2-4.4 combined) were set for the next staff meeting on 12-02-80.

Discussion. The combination of steps 3.2, 3.3, and 3.4 was done because the resources and the planning for step 3.0 dictated that only one pass through the defining process was practical. Therefore the cycling step, step 3.4, and the step to choose which visions to define, step 3.2, were not needed.

The reasons for the decision to choose four visions for defining were basic and persuasive: simplicity, limited resources, and to enhance the attainment of the Methodology's purposes. This decision seemed like the best way, with limited resources, to maximize the likelihood that those visions which were defined would also be promoted.

In step 3.3 the GWM provides a reference for procedures to define the visions. Even though the applier did not experience any problems in formulating specific steps and ad hoc procedures to carry out the defining process, he did have to add and modify substantially the procedures as written. Therefore applications of the Methodology, especially at the level of resources
of this application, might be done more efficiently with modifications of the steps as written in Draft IIa.

Since only one teacher out of 15 invited attended the meeting of 11-18-80, the problem of non-response was enlarged to include non-attendance at staff meetings. The applier and the CCVSE Director agreed that at this stage of the application it did not serve any purpose to add resources or to try other tactics to achieve teacher participation. However, this was recognized as a problem which should be dealt with in any future application of the GWM at CCVSE, or in any application where lack of participation was a potential or actual problem. The CCVSE Director felt that if teachers had been able to participate in person at the staff meetings from the beginning, cooperation would have been much more likely.

3.5 Produce a list of the defined components of the visions from step 3.3

11-28-80. The applier produced itemized lists of vision components generated through defining. These lists can be seen as part of the third instrument in Appendix B, Attachment 11.

Discussion. This was a very straightforward process; no differences or problems were recorded.

Steps 3.6 and 3.7 were included with steps 4.2-4.4
and step 4.5 respectively. The activities, results, and discussions of steps 3.6 and 3.7 are included in the next section of this Chapter.

Results of Step 4.0

4.0 Measure the extent to which the visions are unfulfilled.

AND

4.1 Determine how many resources are available for this step and allocate the resources to the parts of this step.

11-28-80. The applier allocated the available resources from the Main RAC to the substeps of step 4.0. During this process it was decided to combine steps 4.2, 4.3, and 4.4. The RAC for step 4.0 can be seen in Figure 7.

Discussion. This resource allocation process did not raise any problems. One small error turned up in that no staff meetings were allocated for step 4.0. The most logical explanation was that the meeting allocated, but unneeded, for step 5.0 was actually meant for step 4.0.

3.6 Determine how many people consider which of the defined components on the list from step 3.5 to be among their five highest priority components.

AND

4.2 Choose the first (next) highest priority
# Resource Allocation Chart

For Step 4.0  

<table>
<thead>
<tr>
<th>Resources</th>
<th>a. CCVSE pop. time</th>
<th>b. CCVSE Dir. time</th>
<th>c. Appl'r time</th>
<th>d. Typing</th>
<th>e. Staff mtgs.</th>
<th>f. Mailings</th>
<th>g. Copying</th>
<th>h. Time-line</th>
</tr>
</thead>
<tbody>
<tr>
<td>Credits or (Debits)</td>
<td>0</td>
<td>0</td>
<td>8 hrs</td>
<td>2 docu</td>
<td>0</td>
<td>2</td>
<td>2 docu</td>
<td>(10 days)</td>
</tr>
<tr>
<td>Allocs. or (Changes)</td>
<td>1/3 hr</td>
<td>1/3 hr</td>
<td>10 hrs</td>
<td>1 docu</td>
<td>0</td>
<td>1</td>
<td>1 docu</td>
<td>1 week, by Oct. 31</td>
</tr>
<tr>
<td>Totals Now Available</td>
<td>1/3 hr</td>
<td>1/3 hr</td>
<td>18 hrs</td>
<td>3 docu</td>
<td>0</td>
<td>3</td>
<td>3 docu</td>
<td>1 week, by Dec. 5</td>
</tr>
</tbody>
</table>

**Step: 4.2**  
This step was combined with step 4.3.

| | 4.3 | 1/3 hr | 1/3 hr | 10 hrs | 1 docu | 1 | 0 | 1 docu | 1 week, by Dec. 5 |
| | 4.4 | This step was combined with step 4.3. |
| | 4.5 | 0 | 0 | 2 hrs | 1 docu | 0 | 0 | 1 docu | 1 day, by Dec. 6 |

| Totals Used| 1/3 hr | 1/3 hr | 12 hrs | 2 docu | 1 | 0 | 2 docu | 5 days, to Dec. 3 |
| Credits or (Debits)| 0 | 0 | 6 hrs | 1 docu | (1) | 3 | 1 docu | 2 days |

Figure 7. The Resource Allocation Chart for step 4.0.
component from step 3.7 which has not yet been measured.

AND

4.3 Refer to the Coffing/Hutchinson Needs Analysis Methodology, specifically to the Measuring Process, for procedures to measure the extent to which the component is unfulfilled.

AND

4.4 Go back to step 4.2 until the resources for steps 4.2 and 4.3 are used up, then proceed to step 4.5.

12-01-80. The applier referred to the Needs Analysis Methodology and to a short form of this Methodology (Maxner, 1977) to produce an instrument to 1) determine the order of importance of the components of each vision according to the population and 2) measure the extent to which the components of each vision were fulfilled, according to the population. The resulting third instrument can be seen in Appendix B, Attachment 11.

12-02-80. The third instrument was administered to the CCVSE staff. No teachers attended this staff meeting; eight staff were present. The instrument was completed by all staff before the end of the meeting.

Discussion. Step 3.6 was combined with steps 4.2-4.4 because this would conserve resources and could easily be done without detriment to the attainment of the
Methodology's purposes. Steps 4.2-4.4 were combined for the same reasons as were steps 3.2-3.4. No differences or problems were recorded during the implementation of this group of steps.

4.5 Amend the chart from step 3.7, using the data produced in step 4.3, to show to what extent these defined components of visions are unfulfilled, thus producing the List of Unfulfilled Visions (LUV). Note: This LUV would only be an abbreviated visual representation of the data from step 4.3.

12-03-80. The applier tabulated the results and recorded them on the third instrument. See Appendix B, Attachment 12 for these results. The applier then produced an "Informal Rating Sheet" which listed the average percentage met, the priority sums, and the rank order of the priority sums for each vision component. In addition, the applier informally combined the percentages met and the priority orders to help identify highly desirable vision components for promotion. Two levels of "desirability" were included, stars for the highest level and pluses for the next highest. See Appendix B, Attachment 13 for this Informal Rating Sheet.

Discussion. As with step 2.7 the instrument itself was used to record the results because it was simpler and used less resources than producing a separate chart. The Informal Rating Sheet was originally produced by the
by the applier to aid in the tabulation of the results. However, when this sheet was expanded to include the rank orders and informal ratings, it contained too much information to be recorded on the instrument. At the same time it became obvious to the applier that this rating sheet could be of use in interpreting the results of the third instrument.

Results of Step 5.0

5.0 Match the available resources with the unfulfilled (components of) visions.

5.1 Determine how many resources are available for this step and allocate the resources to the parts of this step.

12-03-80. The resources for step 5.0 were allocated to the one relevant substep, step 5.2. A place was added to the format to record the date the RAC is completed. The RAC for step 5.0 is presented in Figure 8.

Discussion. A place for the date was added to provide a reference point for any modifications made as well as for accuracy of planning and recording for the application. It should be noted that the bottom two rows of the RAC would necessarily be filled in at a later date, logically at the same time the RAC for the next step is completed. At the time the RAC for step 5.0 was filled in, the ap-
<table>
<thead>
<tr>
<th>Resources</th>
<th>a. CCVSE pop. time</th>
<th>b. CCVSE Dir. time</th>
<th>c. Appl'r time</th>
<th>d. Typing</th>
<th>e. Staff mtgs.</th>
<th>f. Mailings</th>
<th>g. Copying</th>
<th>h. Time-line</th>
</tr>
</thead>
<tbody>
<tr>
<td>Credits or (Debits)</td>
<td>0</td>
<td>0</td>
<td>6 hrs</td>
<td>1 docu</td>
<td>(1)</td>
<td>3</td>
<td>1 docu</td>
<td>2 days</td>
</tr>
<tr>
<td>Allocs. or (Changes)</td>
<td>0</td>
<td>2/3hr</td>
<td>10hrs</td>
<td>0</td>
<td>1</td>
<td>0</td>
<td>1 docu</td>
<td>1 week, by Nov. 7</td>
</tr>
<tr>
<td>Totals Now Available</td>
<td>0</td>
<td>2/3hr</td>
<td>16hrs</td>
<td>1 docu</td>
<td>0</td>
<td>3</td>
<td>2 docu</td>
<td>1 week, (by Dec. 10)</td>
</tr>
<tr>
<td>Step: 5.2</td>
<td>0</td>
<td>2/3hr</td>
<td>5 hrs</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>1 week, by Dec. 10</td>
</tr>
</tbody>
</table>

5.3 No further steps were needed for this application.

5.4

5.5

5.6

5.7

Totals Used | 0 | 2/3hr | 3 hrs | 0 | 0 | 0 | 0 | 4 weeks, to Dec. 30 |

Credits or (Debits) | 0 | 0 | 13hrs | 1 docu | 0 | 3 | 2 docu | (3 weeks) |

Figure 8. The Resource Allocation Chart for Step 5.0.
plier believed the condition of step 5.2 for the ap-
plier to "to to step 6.0" was present. It followed that
all subsequent steps were unnecessary for this application.
This did not prove to be entirely the case, as will be
presented later.

5.2 If there are resources from step 1.0 to
maintain a program to promote the general
welfare, go to step 6.0, otherwise pro-
ceed to step 5.3. Reallocate any unused
resources to step 6.0.

12-05-80 through 12-18-80. The applier tried to make
appointments with the CCVSE Director for a meeting to
discuss promotion of the visions. However, the extended
illness of the Director delayed such a meeting until the
de end of December. Due to this delay and the accumulated
delays totaling about one month at this point, the ap-
plier decided to extend the timeline for completion of
the application by approximately two months.

12-30-80. The applier met with the CCVSE Director. It
was decided to have the Director look over the priority
ordering and measurement results, as well as the Informal
Rating Sheet in order to choose vision components to be
promoted. A meeting was scheduled for 01-12-81 for the
Director to do the latter. As with the choice of visions
for defining, the Director stipulated that her choices
would be subject to change by the entire staff. Last
but not least the Director verbally agreed to promote some vision components. Indeed, the Director reported that, as a pleasant surprise to her, she had been able to come up with some funds which could be used specifically for promoting visions.

Discussion. Extending the timeline for the application by two months fortunately was not detrimental to the attainment of the Methodology's purposes, nor to the functioning of this application. All the needed resources for the application were extendable in calendar time even if not in units of resources. Most importantly, the Director had no problems with the timeline extension.

There was one small problem with this step and with the entire step 5.0. None of the activities which the aplier worked out to accomplish step 5.0 were specified in the Methodology. The purpose of step 5.2 was achieved, but resources were wasted and perhaps the quality of the application suffered because of this lack of specification. For example, a logical requisite for determining "if there are resources. . . to promote the general welfare," is to obtain some commitment from the controller of resources for the promotion of visions. Step 6.2 refers to a contract obtained in step 5.7, but step 5.0 as written does not include step 5.7 if it is determined in step 5.2 that "there are resources. . . to promote the general welfare."
It would seem that step 5.7 should be included whenever step 5.0 is implemented.

Steps 5.3 through 5.6 are not listed here because they were not implemented, as discussed above. Step 5.7 was implemented to an extent, and further discussion of this can be found in the section for steps 6.2 and 5.7 combined.

Results of Step 6.0

6.0 Maintain a program to realize the unfulfilled visions of the population.

6.1 Determine how many resources are available for this step, and allocate the resources among the parts of this step.

12-30-80. The applier allocated the resources available for step 6.0 to the substeps of this step. The RAC for step 6.0 is presented in Figure 9. It was decided to combine step 6.4 with step 7.0 and step 5.7 with step 6.2.

Discussion. This time the implementation of the resource allocation step did not yield any modifications to the RAC format. Step 6.4 was combined with step 7.0 because at least for this application the purposes of these two steps were essentially the same: to evaluate the accomplishments to date of this application.
<table>
<thead>
<tr>
<th>Resources</th>
<th>a. CCVSE pop. time</th>
<th>b. CCVSE Dir. time</th>
<th>c. Appl'r time</th>
<th>d. Typing</th>
<th>e. Staff mtgs.</th>
<th>f. Staffing</th>
<th>g. Copying</th>
<th>h. Time-line</th>
</tr>
</thead>
<tbody>
<tr>
<td>Credits or (Debits)</td>
<td>0</td>
<td>0</td>
<td>13 hrs</td>
<td>1 docu</td>
<td>0</td>
<td>3</td>
<td>2 docu</td>
<td>(3 weeks)</td>
</tr>
<tr>
<td>Allocs. or (Changes)</td>
<td>0</td>
<td>1½ hr</td>
<td>50 hrs</td>
<td>1 docu</td>
<td>2</td>
<td>1</td>
<td>1 docu</td>
<td>5 weeks, by Dec. 12</td>
</tr>
<tr>
<td>Totals Now Available</td>
<td>0</td>
<td>1½ hr</td>
<td>63 hrs</td>
<td>2 docu</td>
<td>2</td>
<td>4</td>
<td>3 docu</td>
<td>(7 weeks), (by Mar. 5)</td>
</tr>
<tr>
<td>Step: 6.2</td>
<td>1/3 hr</td>
<td>3/4 hr</td>
<td>30 hrs</td>
<td>0</td>
<td>1</td>
<td>0</td>
<td>1 docu</td>
<td>2 weeks, by Jan. 29</td>
</tr>
<tr>
<td>6.3</td>
<td>1/3 hr</td>
<td>3/4 hr</td>
<td>20 hrs</td>
<td>0</td>
<td>1</td>
<td>0</td>
<td>1 docu</td>
<td>5 weeks, by Mar. 5</td>
</tr>
<tr>
<td>6.4</td>
<td>This step was combined with step 7.0.</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Totals Used</td>
<td>2/3 hr</td>
<td>1½ hr</td>
<td>50 hrs</td>
<td>0</td>
<td>2</td>
<td>0</td>
<td>1 docu</td>
<td>8 weeks, to Mar. 10</td>
</tr>
<tr>
<td>Credits or (Debits)</td>
<td>(2/3 hr)</td>
<td>0</td>
<td>13 hrs</td>
<td>2 docu</td>
<td>0</td>
<td>4</td>
<td>2 docu</td>
<td>(1 week)</td>
</tr>
</tbody>
</table>

Figure 9. The Resource Allocation Chart for Step 6.0.
A problem was discovered in the Main RAC. Two staff meetings were correctly allocated for this step, but the necessary time for the CCVSE population to attend these meetings was left out. Fortunately this did not prove to be a problem for this application because more staff time was available. By the time this RAC was completed, typing resources had been given up as impractical, and mailings were no longer needed. Given the built in delays with staff meetings and the expanded timeline, the five weeks originally allocated for this step were changed to seven weeks.

6.2 Design a program to realize a particular unfulfilled component of a vision as defined in step 3.0 and as measured in step 4.0, and as contracted for in step 5.7.

AND

5.7 Obtain a service agreement or contract for promoting the general welfare, specifically one or more unfulfilled components of one or more visions.

01-12-81. The applier met with the CCVSE Director to choose vision components for promotion. The Director expressed interest in several components, but elected to leave the actual choices to the full staff. The necessary staff participation was scheduled for the next available staff meeting on 01-20-81.
01-20-81. At the meeting the staff decided on four components from one vision for promotion. One other vision was deemed largely met and not practical to implement. An implementation plan for the first vision was developed. This plan included a deadline of 03-03-81 for the implementation of its elements. People took responsibility for further development and for implementation of the plan. The point was made by the applier that the March 3rd deadline was necessary for purposes of evaluation and this field test, but that there was no reason for the promotion of the visions to end at this point. The implementation elements developed at this time were designed to be at least partially achievable by this deadline. The development of an implementation plan for the third vision was scheduled for the next available staff meeting of 02-10-81.

02-10-81. At this meeting the staff chose three components of the third vision for promotion, but it was determined that they needed to be redefined. The three components were redefined into three new components, and an implementation plan was developed for these new components. In order to help with the plans developed to promote all three visions, the staff requested from the applier a list of the implementation elements. The Implementation Elements for Vision Components can be found in Appendix B,
Attachment 16. The applier arranged to check on the progress of the implementation plans at the next staff meeting of 02-24-81.

02-18-81. The applier produced the Implementation Elements for Vision Components.

02-19-81. The applier distributed the Implementation Elements to the CCVSE staff.

Discussion. Choosing which components of which visions to promote should be part of the service agreement of step 5.7, but no procedures to do this were included in Draft IIa. This indicates that there are gaps in step 5.0 and/or 6.0 with respect to obtaining a service agreement and specifying which visions are to be promoted. As had been the case all along, the two week intervals (or greater) between staff meetings continued to be a problem for the timetable. For this application this was not a serious problem, but especially at this stage of the application, the intervals seemed to be unfortunate delays in the promotion of the general welfare of the population.

One worthwhile side effect of people choosing which vision they wanted to define (steps 3.2-3.4) was that the same people tended to take responsibility for promoting the same visions they had defined. The redefinition of three vision components during this step provided an
interesting example of the methodological principle that any part of the Methodology can be used at any time as needed.

6.3 Implement the program from step 6.2.

02-24-81. The applier met with the staff to discuss the implementation plans to date. A few stumbling blocks were ironed out. Deadline commitments were obtained for specific activities for most components. One key staff person was absent from this meeting, and consequently the plans for some vision components were not updated. Also, some component plans were being held up by the lack of coordination with the absent staff member. An evaluation of progress to date was scheduled for the next staff meeting of 03-10-81. Because of this, the deadline for implementation of the promotional elements was moved forward one week to this same date.

02-27-81. The applier called the staff member who was absent from the last meeting to check on the progress of the vision components for which she had responsibility. This staff member said that she had a draft of the proposal which was needed for these components and for coordination with others, and that she would send this proposal to the appropriate person for coordination.
Discussion. No differences or problems were experienced in the application of this step.

As noted earlier step 6.4 was combined with step 7.0. See the following section for the activities and discussion of these combined steps.

Results of Step 7.0

7.0 Evaluate and revise this application of the General Welfare Methodology in order to maximize the accomplishment of the purpose: to promote the general welfare of the population.

AND

6.4 Evaluate the program with respect to the extent to which the unfulfilled component is still unfulfilled. Go back to step 4.3, then return to step 7.0.

02-27-81. The applier produced a RAC for step 7.0 which is presented as Figure 10.

03-01-81. The applier produced a first draft of the evaluation instrument.

03-03-81. The applier discussed the evaluation instrument with another builder of methodologies. Some modifications were decided upon.

03-05-81. The applier produced the final version of the evaluation instrument. It can be seen in Appendix B,
<table>
<thead>
<tr>
<th>Resources</th>
<th>a. OCVSE pop. time</th>
<th>b. OCVSE Dir. time</th>
<th>c. Appl'r time</th>
<th>d. Typing</th>
<th>e. Staff mtgs.</th>
<th>f. Mailings</th>
<th>g. Copying</th>
<th>h. Time line</th>
</tr>
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<tbody>
<tr>
<td>Credits or (Debits)</td>
<td>(2/3hr)</td>
<td>0</td>
<td>13 hrs</td>
<td>2 docu</td>
<td>0</td>
<td>4</td>
<td>2 docu</td>
<td>(1 week)</td>
</tr>
<tr>
<td>Allocs. or (Changes)</td>
<td>1/3hr</td>
<td>2/3hr</td>
<td>10 hrs</td>
<td>1 docu</td>
<td>1</td>
<td>1</td>
<td>1 docu</td>
<td>1 week, by Dec. 19</td>
</tr>
<tr>
<td>Totals Now Available</td>
<td>(1/3hr)</td>
<td>2/3hr</td>
<td>23 hrs</td>
<td>3 docu</td>
<td>1</td>
<td>5</td>
<td>3 docu</td>
<td>1 week, by Mar. 12</td>
</tr>
<tr>
<td>Step: 7.0</td>
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<td>2/3hr</td>
<td>23 hrs</td>
<td>0</td>
<td>1</td>
<td>0</td>
<td>1 docu</td>
<td>1 week, by Mar. 12</td>
</tr>
<tr>
<td>Totals Used</td>
<td>1/3hr</td>
<td>2/3hr</td>
<td>10 hrs</td>
<td>0</td>
<td>1</td>
<td>0</td>
<td>1 docu</td>
<td>8 days, to Mar. 13</td>
</tr>
<tr>
<td>Credits or (Debits)</td>
<td>(2/3hr)</td>
<td>0</td>
<td>13 hrs</td>
<td>3 docu</td>
<td>0</td>
<td>5</td>
<td>2 docu</td>
<td>(1 day)</td>
</tr>
</tbody>
</table>

Figure 10. The Resource Allocation Chart for Step 7.0.
Attachment 18.

03-10-81. At the staff meeting the applier had the staff members responsible for each vision component report on progress to date. Various materials documenting the progress were collected. Included in these materials were three implementation proposals and two lists of books for staff development brought together as a result of promoting one of the visions. See Appendix B, Attachments 19 through 23 for these materials. The evaluation instrument was then completed by all seven staff members present. In addition, plans, meetings, and deadlines were set by the CCVSE staff in order to continue the implementation plans. The applier scheduled a meeting for 05-26-81 to follow up on the progress of the implementation plans and to provide feedback from the evaluation instrument.

03-13-81. The applier tabulated the evaluation results and recorded them on the evaluation instrument. See Appendix B, Attachment 24 for these results.

Discussion. There was some confusion created for the applier by the similarities between steps 6.4 and 7.0. Neither step contains a breakdown into substeps. There are similarities between the steps because they both call for evaluation and they are placed in sequence near the end of the Methodology. The two purposes contained in
these steps are distinct. One calls for the evaluation of the vision promotion program, and the other calls for evaluation and revision of the entire application. One intent of step 7.0 is for it to be implemented periodically throughout the application as an ongoing corrective mechanism. As such it would logically be a separate step. However, in an application with this level of resources, step 6.4 is almost necessarily a substep of step 7.0. This being the case, the Methodology should be written that way to avoid confusion and problems. Regardless of the solution to this problem, a further specification for one or both of these steps would help the Methodology to achieve its purposes.

The results of the evaluation instrument did not point out any problems with the application or with the Methodology. Only one vision had "percentage met" results which were comparable to the initial measurements from the third instrument. This vision showed an average 34.5 percent gain in the percentage met results. On a scale of 1 to 5 which was used to rate the result of implementing the visions--1 being "worse," 3 "no change," and 5 "better"--the two visions measured obtained average ratings of 3.7 and 3.5. In rating the question,

to what extent do you believe the
general welfare of people at CCVSE
has been promoted by this application
of the General Welfare Methodology?
the staff responded with an average result of 4.0. This evaluation was carried out before the plans to promote the visions had been fully implemented. People were instructed on the instrument to "Please answer the questions below only according to accomplishments to date, not what you think might happen." Considering this, the investigator could not determine any problems indicated in the results.

**Step 8.0**

8.0 Go back to step 1.0 periodically at some specific interval until all resources are used up or until the world becomes perfect.

For reasons of simplicity and practicability this field test was limited to the application of the GWM at one site. One implication of step 8.0 is that the GWM could be applied on a larger basis with multiple applications. These applications could be implemented independently or with some kind of coordination. As discussed in Chapter III, step 1.0 contains dual purposes and language which reflect the same two levels of applicability found in step 8.0. Also, implicit in step 7.0 are two purposes for the evaluation and revision of an application of the GWM: 1) for internal correction and 2) for a large scale promotion of "the general welfare of the population."
Since step 8.0 is relevant almost exclusively for a broad application of the GWM, this step was not included in this field test. There is one condition, however, whereby this step could be relevant for a specific application. This would be when the GWM becomes an ongoing integral part of the management design for a particular population. It is the hope of this applier that the beginning of this phenomenon was seen in the plans, meetings, and deadlines set by the CCVSE staff, as reported above, to continue the promotion of their visions.
CHAPTER V

RECOMMENDATIONS FOR FURTHER DEVELOPMENT AND RESEARCH, AN EVALUATION OF THE STUDY, AND SOME IMPLICATIONS

The results of the field test were enumerated in the previous Chapter with an emphasis on the problems encountered in the application of the General Welfare Methodology (GWM). In this Chapter the investigator will make recommendations regarding possible solutions to these problems. The recommendations will be presented according to two classifications: 1) suggestions for further development of the Methodology which could be undertaken as a result of the data generated by the field test, and 2) problems regarding the GWM which would likely require further research.

Also included in this Chapter will be an evaluation of the extent to which the study achieved its goals. This evaluation will cover the problem statement as presented in Chapter I and the further specification of the field test goals as stated in Chapter III. In the last section of this Chapter the author will draw out some of the implications of the GWM at its present state of development for the promotion of the general welfare of the population in the field of education and beyond.
Recommendations for Further Development

These recommendations are listed primarily according to the order of the steps in which the germinal problems occurred, with no priority order. The only exceptions to these conditions are the first two recommendations. These are broader in scope than the ones which follow, and they are more important than the others for the overall functioning of the Methodology. References to specific steps are provided with each recommendation in order to facilitate the use of the field test results for further development.

Recommendation 1. A different form of the GWM needs to be developed for use with relatively small levels of resources and sizes of population. The field test application of this study is a good example of a small level of resources and size of population. This application also demonstrated the need for a short form of the Methodology. See Maxner (1977) for an example of such a short form. A short form of the GWM would have the purpose of facilitating the accomplishment of the Methodology's purpose for applications with small resources. One characteristic of the short form should be a workbook format which would enable the Methodology to be applied by persons with less training than would be necessary with the long form.
Many of the differences in how Draft IIa was applied from the way it was written, and some of the problems encountered, are attributable to the small level of resources which were available for the field test application. The development of a short form would make use of the experiences of this application with regard to procedures for resource allocations, combinations of steps, further specification of steps, examples of instruments, and various other relevant procedures. Several of the recommendations which follow are specifically useful for the development of a short form, and these will be identified as such. References to specific steps will be found there.

Recommendation 2. A set of steps is needed for the management of an application of the GWM. This set of steps would have the purpose of overseeing the implementation of the other steps. These steps would be used throughout an application as needed in order to provide:

1. Allocation, monitoring, and adjustments of resources,
2. Monitoring of the timeline for the application,
3. Ongoing evaluation and corrective revisions,
4. Determining the order of steps to be implemented, including recycling as needed, and
5. Determining what combinations of steps, if any, should be made.
The need for a set of management steps was identified through the gap analysis described in Chapter II. The field test application confirmed this need and provided results which would be useful for the development of such a set of steps. Some of the other recommendations are identified as being relevant for this task, with reference to steps in the Methodology.

Recommendation 3. The two purposes of step 1.0, as reported in Chapter II, necessitate separate major steps and resource allocations for 1) promotion of the GWM, and 2) negotiation of an application agreement. As written in Draft IIa these purposes are represented in steps 1.2 and 1.3 respectively. However, the problems experienced in the field test application in determining procedures and resources for this step clearly demonstrated the need for separating the steps and further specifying procedures for accomplishing the two purposes. Both purposes would be included in a set of management steps as described above.

Recommendation 4. Another level of breakdown is needed for step 1.3. A number of planning activities need to be implemented at this stage of the Methodology in order to provide a framework for the rest of an application. The results of the field test application provide a good beginning for a further breakdown of this management step.
**Recommendation 5.** Procedures and a format are needed for the production of resource allocation charts (RAC's). This is true both for the Main Resource Allocation Chart of step 1.4 and for all of the RAC's for the major steps. As was demonstrated in the field test application, a blank format can be produced, based on the resources listed on the Main RAC, for use with all subsequent RAC's. The set of resource allocation steps should include procedures for monitoring the use of resources and making adjustments to the resource allocations which reflect ongoing changes in the application. See the discussion for step 3.1 (pp. 83-85) for further details relating to resource allocation procedures and the blank RAC format. This set of steps would be part of the management steps.

**Recommendation 6.** A step, or set of steps, is needed to deal with a lack of cooperation by a part or particular subset of the population. Steps 2.2 and 2.3 in the field test application ran into a problem of non-response by teachers to the instruments. This problem was broadened in steps 3.2 through 3.4 to include non-participation by teachers in the application meetings. Some of the options which should be included in this kind of step(s) would be:

1. To change tactics in trying to secure cooperation,

2. To add resources and/or activities to the application for securing
cooperation, and

3. To drop the non-cooperating persons from the application, especially if the above two options have been tried without success and to keep these persons in the application would mean spending resources to no avail.

The nature of this kind of step(s) dictates that it would be a part of the management steps.

**Recommendation 7.** Beginning with step 2.2 and running throughout the field test application was the problem of delays which affected the planned schedule. A need was demonstrated for monitoring application activities in relation to the set schedule in order to make adjustments in resource allocations, planned activities, and sequences or combinations of steps as necessary. This is another one of the management functions.

**Recommendation 8.** With the amount of resources available to the field test application, it was logical to combine steps 2.3 and 2.6. It would be desirable to do this with small resource applications for the reasons given in the discussion of these combined steps (pp. 77-78). When combining these steps, procedures should be included for adding any visions generated by the test of completeness activities to the list for consideration by all persons in determining the priority order. This recommendation would be part of a short form of the GWM.
**Recommendation 9.** In determining the priorities of visions (step 2.6) people should be asked to "put a check by those visions which you feel are also visions of yours," as well as is already included in Draft IIa, to indicate which are their five highest priority visions. This is especially important with small applications because this additional activity aids in accomplishing the test of completeness purpose and in avoiding tied ranks which would otherwise occur with small numbers of people. The primary purpose of including checks would be to generate more complete and therefore more useful data. For further discussion see the results of steps 2.3 and 2.6 (pp. 77-78) and for step 2.7 (pp. 81-82).

**Recommendation 10.** Even though the verification/education step, step 2.4, was not planned for implementation in the field test application, the activities which were carried out produced results relevant to the purpose of this step. Step 2.4 should be included in a short form of the GWM. The easiest way to do this would be to combine this step with steps 2.3 and 2.6 as was done inadvertently in this application. If this were done, some further specification of appropriate activities should be developed for step 2.4. The other option would be to develop this step to be implemented separately prior to the combined steps 2.3 and 2.6.
Recommendation 11. If steps 2.3 and 2.6 (and possibly step 2.4) are combined in a short form, then steps 2.5 and 2.7 also need to be joined. Without a separate step 2.3 the results needed for a separate step 2.5 are not generated.

Recommendation 12. At least for a short form of the GWM, the recording of results called for in steps 2.7 and 4.5, as well as the results from steps 6.4 and 7.0, should be recorded on the instruments which were used to generate the results. The purposes of these steps can be achieved this way using fewer resources than would be required to produce the charts called for in Draft IIa. Some criteria should be developed, perhaps to be included in the management steps, to determine when charts would be useful. It is possible that these criteria would dictate that charts should be excluded from any form of the Methodology.

Recommendation 13. With small resources the choice and recycle steps on either side of steps 3.3 and 4.3 are not needed. Since a short form would be designed for usually a single implementation of these steps, the choice and cycle steps should be left out of this form of the GWM. In a large application form these steps would be part of the management steps.

Recommendation 14. A step, or set of steps, is needed to
determine which visions should be defined in a first round. Since the assumption that all visions cannot be defined in the first round with available resources is likely just as valid for small or large applications, this recommendation would hold in either case. In the development of this step(s), consideration should be given to the procedures used in steps 3.2-3.4 of the field test application. In order to enhance the probability that the visions which are defined will also be promoted, as a part of this process the controller of resources should probably be asked which of the high priority visions she or he would be interested in promoting.

Recommendation 15. The defining steps, substep 3.3 and step 3.0 in general, need further specification. The number and complexity of the activities which were carried out in the field test application provide both evidence of this need and an example of procedures used to achieve the purpose of defining. In order to enhance the likelihood that people will take responsibilities for promoting particular visions, as occurred in the field test application, these procedures should include, if practical, definition of visions by small groups of people.

Recommendation 16. In a short form of the GWM the priority ordering of vision components specified in steps 3.6 can effectively be combined with the measurement step. See
the results of step 4.0 for details of such a combination in this application.

Recommendation 17. The Informal Rating Sheet produced as a part of step 4.5 should be added to this step as one possible aid in reporting the measurement results. As explained in Recommendation 12, the chart specified in this step was not used in the field test application, and a chart may not be desirable as a part of the Methodology. The Informal Rating Sheet, on the other hand, proved useful in fulfilling the reporting purpose of step 4.5.

Recommendation 18. Step 5.2 requires modification. The activities carried out in the field test application were numerous and complex enough to warrant a second level breakdown for this step. Also, as discussed in the results of this step, the phrase "go to step 6.0" needs to be replaced by "go to step 5.7" in order not to leave out this step whereby an agreement is obtained to promote visions.

Recommendation 19. In the field test application, sub-step 5.7 was carried out partly in step 5.0 by obtaining an agreement to promote visions. However, because of a lack of specificity in step 5.7, the agreement did not include a statement of which visions would be promoted. Procedures to determine which visions are to be promoted should be developed. Such procedures were implemented in
the field test application along with the program design step, step 6.2. It may be that these procedures should be added to step 6.2 rather than to step 5.7.

Recommendation 20. Step 6.2 requires further specification. Besides the procedures referred to above, a breakdown of this step should include procedures for developing implementation plans, methods of recording and feeding back these plans to the population, setting up check points and deadlines, and consideration of the need for further defining to facilitate promotion. Some of these procedures would be part of the management steps.

Recommendation 21. In a short form of the Methodology where no formal ongoing evaluation takes place, steps 6.4 and 7.0 should be implemented in an ongoing manner as a part of the management steps. Whether or not these steps are combined, both need further specification to better accomplish their purposes.

Recommendation 22. Step 8.0 serves primarily as a recycling step for the entire Methodology, and as such it should be part of the management steps. However, notation needs to be added to this step which refers to the potential use of this step for an ongoing, cyclical application for a particular population.
Recommendations for Further Research

These recommendations are presented in no particular priority order. They are all included in this section because in the opinion of the investigator they would require further research, and this research would likely generate results which would enable the GWM to better achieve its purpose.

Recommendation 23. Procedures whereby a person can learn to apply the GWM need to be identified, developed, and tested. References for the development of these training procedures should include:

1. Training procedures used for other methodologies,
2. Materials relating to methodological principles in general, and
3. Past and present efforts intended to promote the general welfare.

The procedures should be logically tested for gaps and then field tested according to the current state of the art.

Recommendation 24. Any further developed parts or forms of the GWM should be logically tested for gaps and then field tested. This would be particularly important if the first two recommendations concerning a short form and a set of steps for management are acted upon.
Recommendation 25. The GWM should be field tested with various populations, in various settings, and at various levels of resources. The purposes of these field tests should be to identify problems and to generate recommendations for solutions.

Recommendation 26. Conflict resolution techniques should be sought out and examined in order to incorporate additional procedures in the Methodology to help resolve any conflicts arising from incompatible visions. See Chapter II, p. 52 for further discussion of this topic.

Recommendation 27. Mechanisms should be sought out and examined whereby resources could be secured for promoting people's visions as identified, defined, and measured in steps 2.0 through 4.0 of the GWM. This should be done so that procedures could be added to the Methodology for identifying and securing the needed resources from all possible sources for promoting the visions of the population. These procedures would be particularly important when resources are not available through an enterprise common to the population. Refer to Chapter II, p. 53 for further discussion of this problem area.

Evaluation of the Study

The problem statement of this study was stated in Chapter I: "to further develop and field test a method-
ology which has as its purpose: 'to promote the general welfare of the population.'" The goals of the study were further specified in Chapter III as the goals of the field test. The means of measurement given for these goals were "a detailed log of the field test activities and a list of any recommendations made."

In contrast to the complexity of the activities which accomplished the goals of this study, the results of the evaluation are simple and straightforward.

Goals
1. To further develop a methodology which has as its purpose: "to promote the general welfare of the population."

2. To field test a methodology which has as its purpose: "to promote the general welfare of the population."

a. To identify problems in the GWM.

Documentation of Accomplishment
Chapter II, pp. 40 through 51, presents the logical testing for gaps which was carried out and the results of these tests as they were incorporated into Draft IIa.

The field test log in Appendix B contains the original nota-
tions of differences and problems relating to specific steps of the GWM as they were implemented in this field test application. Chapter IV, pp. 62 through 108, presents elaborations and discussions of these differences and problems.

Chapter V, pp. 111 through 122, includes a list of 27 recommendations for further development and research to "enable the Methodology to better achieve its purpose."

The field test log in Appendix B and the results presented in Chapter IV document the accomplishment of this goal. The only steps left out of the application were those that were not relevant or possible as explained in the text.
Some Implications of the Methodology

Three implications derived from previous applications of the GWM were discussed in Chapter I: for problem solving in educational institutions, for use with students in the classroom, and as an individual educational experience. The first implication was expanded by a serendipitous result of this field test application. This result indicates that at least under the conditions of this application, the GWM can be used as a management tool at the college level. The third implication was confirmed by the quote from a staff member that "it's a wonderful process of reflection on one's work and well-being."

In a more general sense the GWM shares with other methodologies the aspect of helping people to conceptualize what it is they really want. In addition, a trait of the GWM which is more unique to this Methodology is that of enabling people to experience results which are directly attributable to promoting what it is they said they really wanted. Another implication is that the GWM can facilitate the communication of people's desires as defined by them. A logical extension of this is that people can use the results of implementing the Methodology to lobby for the promotion of their visions. While there is no guarantee that the accomplishment of these implications is generali-
zable beyond the scope of the applications to date, it does now seem possible and desirable to try to expand these results to other populations in education and elsewhere.

Certain kinds of populations and decision makers are likely to be more predisposed towards using the GWM than others. The Community College of Vermont, Southeastern Region (CCVSE), was well suited for the GWM for a number of reasons that would probably be useful as guidelines for seeking out sites for applications of this Methodology. First, CCVSE has a philosophy which encourages participation by all its population in the affairs of the College. In keeping with this philosophy there is no strict hierarchical governing body which would regard the GWM as an intrusion into its management territory. Also, the CCVSE Director fostered this philosophy and continually acted to encourage, facilitate, and occasionally to mandate participation by staff in the GWM application. This latter function was seldom used since the staff is very much a part of the CCVSE philosophy and enthusiasm for this application was generally high. Another factor is that CCVSE is an educational institution which is dedicated to enabling adults, especially those who have been out of the mainstream of education for a time, to grow and change according to their own needs and desires. The CCVSE staff regard themselves to be,
as someone stated in one of her/his visions, "on the cutting edge of education." They were not likely to bring a tradition of maintaining the status quo to bear negatively on an upstart and different approach such as the GWM.

Outside the field of education the GWM has less demonstrated relevance, but no less potential. Various groups today are attempting to make known their visions in an effort to influence decisions favorable to those visions. Common Cause, Ralph Nader and company, and the National Organization for Women are but a few of this kind of organization which might well be able to use the GWM to help achieve their purposes.

Since the GWM actively seeks to enable all persons in the specified population to participate in the application, and since the contributions of all persons participating are kept anonymous and treated equally, for the specified population the GWM can be regarded as democratic in nature. The non-democratic constraints of the real world are most likely to encroach on the democratic intents of the Methodology in the process of promoting the visions. Even here the Methodology contains the potential for obtaining agreements from decision makers to follow the dictates of their constituents and to make known the results of determining, defining, priority ordering, and measuring the visions of the people
before the controllers of resources make their decisions regarding which visions to promote and how to promote them.

While it might seem far fetched at this time, in theory any group of persons with common interests could use the GWM to determine the desires of their entire constituency, and to allocate resources accordingly. This is true for the smallest community, for the nation state, and for the world's population. Perhaps the United Nations could be a vehicle for this last group. Hopefully, modern communication techniques will be coupled with concerns about the increasing demands being placed on the world's resources and a growing awareness of the need for cooperation among all people to improve the quality of life, or even to survive, in order to foster the use of approaches such as the General Welfare Methodology.
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APPENDIX A

THE GENERAL WELFARE METHODOLOGY - Draft IIa - Alan Hodson, Dick Coffing, Tom Hutchinson - September 22, 1980

Purpose - to promote the general welfare of the population

Attributes - to determine in a comprehensive, systematic, and continual process the visions of the population with respect to the best real world possible for everyone; to design programs to realize the visions of the population in such a way as to create a world in which the most number of the most important visions (according to the population) are realized.

Process -
1.0 Secure resources to promote the general welfare of the population
   1.1 Determine how many resources-time, money, people-are available for this step, and allocate the resources to the parts of this step.
   1.2 Promote the General Welfare Methodology.
   1.3 Obtain a service agreement or contract to undertake any part of the methodology; include specification of a population for this application if it is to be a subset of the world population.
   1.4 Allocate the secured resources to the other steps of the methodology for this particular application.
   1.5 Go back to step 1.2 until the resources for this step, 1.0, are used up, then proceed to step 2.0.

2.0 Determine the visions of the population.
   2.1 Determine how many resources are available for this step, and allocate the resources to the parts of this step.
   2.2 Survey the population as directly as possible to obtain an answer from everyone to the following type of question: "What do you really want in the real world for yourself and for others?" An example for a subset of the population would be: "What do you really want for yourself and for others as a part of Jones College?"
   2.3 Test the visions for completeness.
   2.4 Verify the visions through some extensive educational processes involving as many cross-cultural experiences as possible for as many people as possible.
2.5 Produce a list of the tested, verified visions.
2.6 Determine how many people consider which visions on the list from step 2.5 to be among their five highest priority visions.
2.7 Produce a chart which would show the results of step 2.6, ordering the visions according to the numbers of people who chose each vision as one of their five highest, from the largest to the smallest numbers of people who chose each vision.

3.0 Define the visions of the population.
3.1 Determine how many resources are available for this step, and allocate the resources to the parts of this step.
3.2 Choose the first (next) highest priority vision from step 2.7 which has not yet been defined.
3.3 Refer to the Fortune/Hutchinson Evaluation Methodology, specifically to the Operationalization of a Goal or Intent Process, for procedures to define the vision.
3.4 Go back to step 3.2 until the resources for steps 3.2 and 3.3 run out, then proceed to step 3.5.
3.5 Produce a list of the defined components of the visions from step 3.3.
3.6 Determine how many people consider which of the defined components on the list from step 3.5 to be among their five highest priority components.
3.7 Produce a chart which would show the results of step 3.6, ordering the defined components of visions according to the numbers of people who chose each component as one of their five highest, from the largest to the least numbers of people who chose each component.

4.0 Measure the extent to which the visions are unfulfilled.
4.1 Determine how many resources are available for this step and allocate the resources to the parts of this step.
4.2 Choose the first (next) highest priority component from step 3.7 which has not yet been measured.
4.3 Refer to the Coffing/Hutchinson Needs Analysis Methodology, specifically the Measuring Process, for procedures to measure the extent to which the component is unfulfilled.
4.4 Go back to step 4.2 until the resources for steps 4.2 and 4.3 are used up, then proceed to step 4.5.
4.5 Amend the chart from step 3.7, using the data produced in step 4.3, to show to what extent these
defined components of visions are unfulfilled, thus producing the List of Unfulfilled Visions (LUV). Note: This LUV would only be an abbreviated visual representation of the data from step 4.3.

5.0 Match the available resources with the unfulfilled (components of) visions.

5.1 Determine how many resources are available for this step and allocate the resources to the parts of this step.

5.2 If there are resources from step 1.0 to maintain a program to promote the general welfare, go to step 6.0, otherwise proceed to step 5.3. Reallocation any unused resources to step 6.0.

5.3 Promote the General Welfare Methodology.

5.4 Promote the findings of steps 2.0-4.0 as shown partially in the List of Unfulfilled Visions (LUV) from step 4.5, in order to attract controllers of resources.

5.5 Match the controller of resources with the first unfulfilled component (unfulfilled for the largest number of people) from the List of Unfulfilled Visions which the controller is interested in promoting.

5.6 If the controller of resources has an operating program(s) which he/she wants to gear to promoting an unfulfilled component, using the data from steps 2.0-4.0 of this methodology, go to step 6.0, otherwise proceed to step 5.7.

5.7 Obtain a service agreement or contract for promoting the general welfare, specifically one or more unfulfilled components of one or more visions.

6.0 Maintain a program to realize the unfulfilled visions of the population.

6.1 Determine how many resources are available for this step, and allocate the resources among the parts of this step.

6.2 Design a program to realize a particular unfulfilled component of a vision as defined in step 3.0 and as measured in step 4.0, and as contracted for in step 5.7.

6.3 Implement the program from step 6.2.

6.4 Evaluate the program with respect to the extent to which the unfulfilled component is still unfulfilled. Go back to step 4.3, the return to step 7.0.
7.0 Evaluate and revise this application of the General Welfare Methodology in order to maximize the accomplishment of the purpose: to promote the general welfare of the population.

8.0 Go back to step 1.0 periodically at some specific interval until all resources are used up or until the world becomes perfect.
<table>
<thead>
<tr>
<th>Date</th>
<th>Step</th>
<th>What Actually Done</th>
<th>If Different From Step, Why</th>
<th>Results</th>
<th>Problems</th>
</tr>
</thead>
<tbody>
<tr>
<td>09-01-80</td>
<td>1.1</td>
<td>Considered 1.1: my commitment as applier; decided to devote resources to 1.1 and to field test application.</td>
<td>Needed to determine my time, timeline, and population size limit for this application in order to be able to make a commitment to this application and to VCC DM.</td>
<td>Determined my time as applier to devote to 1.1: 2 hours, and to whole application: 10 hours/week through December, 1980.</td>
<td>Much program confusion: two purposes contained in step 1.0.</td>
</tr>
<tr>
<td>09-02-80</td>
<td>1.1</td>
<td>Called VCC DM to set up a meeting.</td>
<td></td>
<td>Determined and secured time of VCC DM for meeting for 1.1: 1 hour, on 02-11-80.</td>
<td></td>
</tr>
<tr>
<td>09-11-80</td>
<td>1.2</td>
<td>Explained GWM to VCC DM.</td>
<td>VCC DM was very enthusiastic about applying GWM at CCVSE.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>09-11-80</td>
<td>1.3</td>
<td>Asked VCC DM what resources are available, and what subpopulations are in VCC.</td>
<td>Obtained a verbal agreement with VCC DM to apply GWM at this site. Resources secured:</td>
<td>More breakdown needed.</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>Provided test of completeness for resources.</td>
<td>a) 1½ hr. per staff or teacher</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>Worked out reasonable subpopulation for this application, resources to be applied, and timeline.</td>
<td>b) 4 hrs. DM time</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>Scheduled presentation for staff of GWM and the</td>
<td>c) up to 10 hrs. per week of my time as applier</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Date</td>
<td>Step</td>
<td>What Actually Done</td>
<td>If Different From Step, Why</td>
<td>Results</td>
<td>Problems</td>
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</tr>
<tr>
<td>09-15-80</td>
<td>2.2</td>
<td>Produced and typed open ended question instrument.</td>
<td></td>
<td>See Attachment 1, the GWM Instrument #1.</td>
<td></td>
</tr>
<tr>
<td>09-16-80</td>
<td>2.2</td>
<td>Explained GWM and this application. Handed out GWM Instrument #1 at staff meeting. Set 09-18-80 as deadline for handing in responses from staff, and for secretary to get out mailing to teachers. Wrote cover letter and copied question for teachers.</td>
<td>Obtained commitment from staff to answer the question and cooperate with the application. See cover letter, Attachment 2.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>09-18-80</td>
<td>1.4</td>
<td>Wrote down a breakdown of resources secured through 1.3.</td>
<td></td>
<td>See Attachment 3, the Main GWM Resource Allocation Chart.</td>
<td>No procedures or example of RAC.</td>
</tr>
</tbody>
</table>

Log of Steps for CCVSE Field Test of GWM, IIa
<table>
<thead>
<tr>
<th>Date</th>
<th>Step</th>
<th>What Actually Done</th>
<th>If Different From Step, Why</th>
<th>Results</th>
<th>Problems</th>
</tr>
</thead>
<tbody>
<tr>
<td>09-18-80</td>
<td>2.1</td>
<td>Referred to 1.4 RAC to produce 2.1 RAC.</td>
<td>Limited resources and success of the application.</td>
<td>See Attachment 4. Several steps were combined.</td>
<td>No procedures or example of RAC.</td>
</tr>
<tr>
<td>09-18-80</td>
<td>2.2</td>
<td>Checked in at VCC office for staff responses and for status of teacher mailing.</td>
<td></td>
<td>2 of 8 staff responses back. Mailing not out.</td>
<td>Delay</td>
</tr>
<tr>
<td>09-18-80</td>
<td>2.2</td>
<td>Talked with 3 staff at VCC to encourage responses. Set new deadline for 09-24-80.</td>
<td></td>
<td>Secretary said she would get out the mailing ASAP.</td>
<td></td>
</tr>
<tr>
<td>09-24-80</td>
<td>2.2</td>
<td>Checked for responses. Checked about mailing. Talked with DM about difficulty in getting back responses.</td>
<td></td>
<td>5 of 9 staff responses back. Mailing had gone out the day before. DM directed secretary to ask each staff if she/he had responded, and if not, to do so by 09-29-80.</td>
<td>Delay</td>
</tr>
<tr>
<td>10-03-80</td>
<td>2.2</td>
<td>Picked up responses. Scheduled next step for 10-14-80 staff meeting.</td>
<td></td>
<td>Now 9 responses, mostly staff (7 of 9).</td>
<td>Delay. Need step to deal</td>
</tr>
<tr>
<td>Date</td>
<td>What Actually Done</td>
<td>Results</td>
<td>Problems</td>
<td></td>
<td></td>
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<td>-------------------------------------------------------------------------</td>
<td>--------------------------------------------------------------------------</td>
<td></td>
<td></td>
</tr>
<tr>
<td>10-07-80</td>
<td>Picked up 1 more response, 2.2</td>
<td>10 final responses in.</td>
<td>Now 10 final responses in.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>10-14-80</td>
<td>Drafted an instrument to accomplish 2.3 &amp; 2.6.</td>
<td>First draft of the GWM Instrument #2.</td>
<td>Added check marks to 2.6 because of habit, need to test for completeness</td>
<td></td>
<td></td>
</tr>
<tr>
<td>10-14-80</td>
<td>Bounced the instrument off Tom, made some changes.</td>
<td>Produced final instrument.</td>
<td>Need example(s) of such instrument(s) in the methodology.</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>See Attachment 5, the GWM Instrument #2.</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>II responses total: 9</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>Staff added 2 visions as part of test of completeness.</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

The 2 added visions should have been added to everyone's list before steps 3 & 4.
<table>
<thead>
<tr>
<th>Date</th>
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</tr>
</thead>
<tbody>
<tr>
<td>10-14-80</td>
<td>2.4</td>
<td>There was a very lively discussion while staff considered all items.</td>
<td>This was an unplanned occurrence.</td>
<td>People considered, defended, advocated, and sometimes changed their ideas about the various visions.</td>
<td>Need such a procedure, especially for small applications.</td>
</tr>
<tr>
<td>10-21-80</td>
<td>2.5 &amp; 2.7</td>
<td>Planned how to do this combined step.</td>
<td>These steps were necessarily combined because steps 2.3 and 2.6 were.</td>
<td>Decided to use the additional data from the check marks.</td>
<td></td>
</tr>
<tr>
<td>10-21-80</td>
<td>2.3 &amp; 2.6</td>
<td>Wrote and typed letter to teachers to accompany instrument. Copied the instrument and the GWM, IIa, and stuffed all these into envelopes.</td>
<td></td>
<td>See Attachment 6, the letter to teachers. The letters went out the next day.</td>
<td></td>
</tr>
<tr>
<td>10-28-80</td>
<td>3.2 &amp; 3.4</td>
<td>Planned how to implement this combined step.</td>
<td></td>
<td>Decided to ask DM to choose a maximum of 4 of the highest priority visions which she would be interested in promoting.</td>
<td></td>
</tr>
<tr>
<td>10-29-80</td>
<td>2.3 &amp; 2.6</td>
<td>Picked up responses at CCV office.</td>
<td></td>
<td>1 teacher response</td>
<td></td>
</tr>
<tr>
<td>Date</td>
<td>Step</td>
<td>What Actually Done</td>
<td>If Different From Step, Why</td>
<td>Results</td>
<td>Problems</td>
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<td>-----------------------------------------------</td>
</tr>
<tr>
<td>11-04-80</td>
<td>2.3 &amp; 2.6</td>
<td>Picked up more responses. Talked with DM about non-respondents. Scheduled step 3.0 for 11-18-80.</td>
<td>Needed to do something about non-respondents</td>
<td>2 more teacher responses, 1 more staff response from person absent at 10-14-80 meeting. Teachers were to be invited to next meeting.</td>
<td>Again, problem of non-response. Lack of steps to deal with this.</td>
</tr>
<tr>
<td>11-10-80</td>
<td>2.5 &amp; 2.7</td>
<td>Ordered the prioritized visions by staff, teachers, and total responses.</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>11-10-80</td>
<td>3.1</td>
<td>Produced RAC for step 3.0. Produced new format for RAC's.</td>
<td>6 rows were added to make RAC's more useful for planning and resource allocation.</td>
<td>See Attachment 7. Some steps were combined. Extra resources were noted on the new format.</td>
<td>No format for RAC's</td>
</tr>
<tr>
<td>11-11-80</td>
<td>3.2-3.4</td>
<td>Produced draft of steps to implement the defining process.</td>
<td></td>
<td>First draft of defining steps.</td>
<td></td>
</tr>
<tr>
<td>11-12-80</td>
<td>3.2-3.4</td>
<td>Conferred with Tom about defining process.</td>
<td></td>
<td>Some changes to 1st draft yielded steps for defining. See Attachment 8.</td>
<td></td>
</tr>
<tr>
<td>11-16-80</td>
<td>2.5 &amp; 2.7</td>
<td>Listed the vision priorities including checks, combining teachers and staff responses.</td>
<td>Used the instrument to record for ease and conservation of resources.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Date</td>
<td>Step</td>
<td>What Actually Done</td>
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<td>--------------------------------------------------------------------------</td>
</tr>
<tr>
<td>11-17-80</td>
<td>3.2- 3.4</td>
<td>Met with DM to present list of visions and to choose ones to be defined. DM stated that staff/teachers should be able to make changes.</td>
<td>Limited resources for defining necessitated DM choices at this point.</td>
<td>DM picked visions 1 &amp; 12, 87, 72, and 20-25. Applier amended step 3 of defining process.</td>
<td></td>
</tr>
<tr>
<td>11-18-80</td>
<td>3.3</td>
<td>Met with staff to define chosen visions. 63 added. Voted to define 1 &amp; 12, 63, and 72. 7 staff, 1 teacher chose which vision each wanted to define. Distribution was equalized to 3, 3, &amp; 2 respectively. Next step scheduled for 12-02-80.</td>
<td>Definition components for the 3 visions.</td>
<td>Teachers were invited to the meeting, but only 1 came. Step(s) needed to check sub-populations for degree of cooperation, and to take corrective actions.</td>
<td></td>
</tr>
<tr>
<td>11-28-80</td>
<td>3.5</td>
<td>Produced itemized lists of vision components.</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>11-28-80</td>
<td>4.1</td>
<td>Produced RAC for 4.0.</td>
<td>See Attachment 10.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>12-01-80</td>
<td>3.6 &amp; 4.2-4.4</td>
<td>Produced prioritization and measurement instrument.</td>
<td>See Attachment 11, the GVM Instrument #3.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>12-02-80</td>
<td>3.6 &amp; 4.2-4.4</td>
<td>Met with staff to prioritize and measure components of visions.</td>
<td>GVM Instrument #3 was completed.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Date</td>
<td>Step</td>
<td>What Actually Done</td>
<td>If Different From Step, Why</td>
<td>Results</td>
<td>Problems</td>
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<td>-----------------------------------</td>
</tr>
<tr>
<td>12-03-80</td>
<td>4.5</td>
<td>Results were tabulated and recorded on the instrument. An &quot;Informal Rating Sheet&quot; was produced.</td>
<td>Informal Rating Sheet produced accidentally, but used because helped to interpret the results.</td>
<td>See Attachment 12 for the results and Attachment 13 for the Informal Rating Sheet.</td>
<td></td>
</tr>
<tr>
<td>12-03-80</td>
<td>5.1</td>
<td>Produced RAC for 5.0.</td>
<td></td>
<td>Added place for date to format. See Attachment 14.</td>
<td></td>
</tr>
<tr>
<td>12-05-80 through 12-18-80</td>
<td>5.2</td>
<td>Tried to make appointments with DM, but DM was ill.</td>
<td></td>
<td>Extended DM illness forced extension of timeline.</td>
<td></td>
</tr>
<tr>
<td>12-30-80</td>
<td>5.2</td>
<td>Met with DM about promoting the defined visions. DM gave verbal agreement to promote some of the vision components. Scheduled next meeting for 01-12-81.</td>
<td>Verbal agreement was obtained in order to determine that there were resources to promote visions at CCVSE.</td>
<td>Decided to have DM consider the results and the Informal Rating Sheet in order to choose components for promotion. These choices were to be subject to full staff approval.</td>
<td></td>
</tr>
<tr>
<td>12-30-80</td>
<td>6.1</td>
<td>Produced RAC for 6.0.</td>
<td>Both evaluation steps could be accomplished together, thus saving resources.</td>
<td>See Attachment 15, step 6.4 combined with step 7.0.</td>
<td></td>
</tr>
<tr>
<td>Date</td>
<td>Step</td>
<td>What Actually Done</td>
<td>If Different From Step, Why</td>
<td>Results</td>
<td>Problems</td>
</tr>
<tr>
<td>------------</td>
<td>------</td>
<td>------------------------------------------------------------------------------------</td>
<td>-------------------------------------------------------------------</td>
<td>-------------------------------------------------------------------------</td>
<td>----------------------------------------------------------------------------</td>
</tr>
<tr>
<td>01-12-81</td>
<td>6.2</td>
<td>Met with DM to choose components to be promoted and to work out a process for staff meeting, or implementation. Scheduled next step for 01-20-81 meeting.</td>
<td>DM concurred with ratings on the Informal Rating Sheet with exceptions for overlap and impracticability. DM left choices for full staff.</td>
<td>Large intervals, at least 2 weeks, between staff meetings prolonged the application.</td>
<td></td>
</tr>
<tr>
<td>01-20-81</td>
<td>6.2</td>
<td>Met with staff to decide on implementation plans. Visions 1 and 63 were covered. Not enough time at meeting to cover vision 72 so that was scheduled for 02-10-81.</td>
<td>Implementation plans turned out to be logical part of service agreement.</td>
<td>Staff took responsibility for specific components. Elements of the implementation plans were specified. 03-03-81 deadline for 1st stage of implementation was set. This date was taken into account in specifying elements.</td>
<td></td>
</tr>
<tr>
<td>02-10-81</td>
<td>6.2</td>
<td>Met with staff to continue implementation plans. Vision 72 was covered. Staff asked for list of implementation elements. Next meeting set for 02-24-81.</td>
<td>Results were along the same lines as those from the previous meeting.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>02-18-81</td>
<td>6.2</td>
<td>Produced a list of the implementation elements.</td>
<td>See Attachment 16.</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

This would be a good feedback to include.
<table>
<thead>
<tr>
<th>Date</th>
<th>Step</th>
<th>What Actually Done</th>
<th>If Different From Step, Why</th>
<th>Results</th>
<th>Problems</th>
</tr>
</thead>
<tbody>
<tr>
<td>02-19-81</td>
<td>6.2</td>
<td>Distributed the implementation elements to staff.</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>02-24-81</td>
<td>6.3</td>
<td>Met with staff to discuss implementation progress to date. Meeting set to do evaluation on 03-10-81.</td>
<td></td>
<td>A few stumbling blocks were ironed out. Date commitments were obtained for most of the components. Deadline moved to 03-10-81.</td>
<td></td>
</tr>
<tr>
<td>02-27-81</td>
<td>6.3</td>
<td>Called one staff member absent at 02-24-81 meeting to check on progress with her component.</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>02-27-81</td>
<td>7.0</td>
<td>RAC for 7.0 was produced.</td>
<td>This was added for consistency and completeness.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>03-01-81</td>
<td>6.4 &amp; 7.0</td>
<td>Produced 1st draft of evaluation instrument.</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>03-03-81</td>
<td>6.4 &amp; 7.0</td>
<td>Bounced evaluation instrument off Tom.</td>
<td></td>
<td>Some changes were decided upon.</td>
<td></td>
</tr>
</tbody>
</table>

in the GWM.

One staff member absent which held up not only her component but also ones she had to coordinate with.

She had a proposal draft which she said she would send to another staff member who needed it for coordination.

See Attachment 17.
<table>
<thead>
<tr>
<th>Date</th>
<th>Step</th>
<th>What Actually Done</th>
<th>If Different From Step, Why</th>
<th>Results</th>
<th>Problems</th>
</tr>
</thead>
<tbody>
<tr>
<td>03-05-81</td>
<td>6.4 &amp; 7.0</td>
<td>Final form of the evaluation instrument was produced.</td>
<td></td>
<td>See Attachment 18, the GWM Instrument #4.</td>
<td></td>
</tr>
<tr>
<td>03-10-81</td>
<td>6.4 &amp; 7.0</td>
<td>Met with staff to do evaluation. Staff told of implementation progress to date, shared materials produced to date, then filled out evaluation instrument. Staff also set continuation plans, meetings, and deadlines to continue implementation.</td>
<td></td>
<td>See Attachments 19-23 for implementation materials.</td>
<td>Step 8.0 could be used for a continued application, but needs to include note of this possible use.</td>
</tr>
<tr>
<td>03-13-81</td>
<td>6.4 &amp; 7.0</td>
<td>Results of evaluation instrument were tabulated and recorded.</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
Attachment 1

The following question is part of a methodology I am field testing at the Community College of Vermont, southeastern region. This methodology is called the General Welfare Methodology. It has as its purpose, "to promote the general welfare of a population." In this case the population is the staff and some teachers of CCV in this region.

The purpose of this question is to obtain an initial list of the desires or visions which you have as a part of CCV in this region. This process will be greatly enhanced if you do the following:

1) Answer the questions as completely as possible,
2) Do not exclude desires or visions which may already be fulfilled,
3) Be specific, and
4) List each desire/vision individually rather than writing them in paragraph form.

I look forward to working with you on this project. I believe the results will be beneficial to you and to CCV. Thank you in advance for your cooperation.

Alan Hodson

WHAT DO YOU REALLY WANT FOR YOURSELF AND FOR OTHERS AS A PART OF THE COMMUNITY COLLEGE OF VERMONT, SOUTHEASTERN REGION?
Dear CCV Teacher:

Enclosed is a question which I hope you will take a few minutes to answer. All teachers who have taught before at CCV are being asked to take part in this process. The field test is designed to take about 1-1\frac{1}{2} hrs. of your time from now through December when it will be completed.

The General Welfare Methodology which is being tested is one of a number of methodologies coming out of the School of Education at UMASS, Amherst. The Evaluation and Needs Analysis Methodologies have been previously applied at CCV, Brattleboro. I chose this site to field test the General Welfare Methodology because I have taught here before, I have a continuing interest in its welfare, and I welcome the chance to help promote the welfare of the people who make up CCV in this region. My primary purpose is to test this Methodology, but I fully expect its purpose to be accomplished by doing so. The purpose of the General Welfare Methodology is to promote the general welfare of a population.

I would greatly appreciate your returning your answer to the question to Mary Zabriskie at the Brattleboro office, 67 Main St., Brattleboro, Vt. 05301 by October 6. The next step will be to have everyone consider each other's visions to help generate as complete a list as possible.

Thank you,

Alan Hodson
## Resource Allocation Chart

### For Step: 1.4  
**Date:** 09-18-80

<table>
<thead>
<tr>
<th>Step</th>
<th>Resources</th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>a. CCVSE pop. time</td>
<td>b. CCVSE Dir. time</td>
<td>c. Appl'r time</td>
<td>d. Typing time</td>
<td>e. Staff mtgs.</td>
<td>f. Mailings</td>
<td>g. Copying</td>
<td>h. Timeline</td>
</tr>
<tr>
<td>2.0</td>
<td>$\frac{1}{2}$ hr</td>
<td>$\frac{1}{2}$ hr</td>
<td>40 hrs</td>
<td>5 docu</td>
<td>2</td>
<td>3</td>
<td>5 docu</td>
<td>4 weeks, by Oct. 10</td>
</tr>
<tr>
<td>3.0</td>
<td>$\frac{1}{3}$ hr</td>
<td>$\frac{1}{3}$ hr</td>
<td>20 hrs</td>
<td>4 docu</td>
<td>1</td>
<td>2</td>
<td>4 docu</td>
<td>2 weeks, by Oct. 24</td>
</tr>
<tr>
<td>4.0</td>
<td>$\frac{1}{3}$ hr</td>
<td>$\frac{1}{3}$ hr</td>
<td>10 hrs</td>
<td>1 docu</td>
<td>0</td>
<td>1</td>
<td>1 docu</td>
<td>1 week, by Oct. 31</td>
</tr>
<tr>
<td>5.0</td>
<td>0</td>
<td>$\frac{2}{3}$ hr</td>
<td>10 hrs</td>
<td>0</td>
<td>1</td>
<td>0</td>
<td>1 docu</td>
<td>1 week, by Nov. 7</td>
</tr>
<tr>
<td>6.0</td>
<td>0</td>
<td>1 hr</td>
<td>50 hrs</td>
<td>1 docu</td>
<td>2</td>
<td>1</td>
<td>1 docu</td>
<td>5 weeks, by Dec. 12</td>
</tr>
<tr>
<td>7.0</td>
<td>$\frac{1}{3}$ hr</td>
<td>$\frac{2}{3}$ hr</td>
<td>10 hrs</td>
<td>1 docu</td>
<td>1</td>
<td>1</td>
<td>1 docu</td>
<td>1 week, by Dec. 19</td>
</tr>
<tr>
<td>8.0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>--</td>
</tr>
</tbody>
</table>
## Resource Allocation Chart

For Step 2.0  \hspace{2cm} Date: 09-18-80

<table>
<thead>
<tr>
<th>Step</th>
<th>a. CCVSE pop. time</th>
<th>b. CCVSE Dir. time</th>
<th>c. Appl'r time</th>
<th>d. Typing time</th>
<th>e. Staff mtgs.</th>
<th>f. Mailings</th>
<th>g. Copying</th>
<th>h. Timeline</th>
</tr>
</thead>
<tbody>
<tr>
<td>2.2</td>
<td>½ hr</td>
<td>½ hr</td>
<td>20 hrs</td>
<td>1 docu</td>
<td>1</td>
<td>1</td>
<td>2 docu</td>
<td>2 weeks, by Sep. 27</td>
</tr>
<tr>
<td>2.3</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>This step was combined with step 2.6.</td>
</tr>
<tr>
<td>2.4</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>—</td>
</tr>
<tr>
<td>2.5</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>This step was combined with step 2.7.</td>
</tr>
<tr>
<td>2.6</td>
<td>½ hr</td>
<td>½ hr</td>
<td>20 hrs</td>
<td>2 docu</td>
<td>1</td>
<td>1</td>
<td>2 docu</td>
<td>2 weeks, by Oct. 8</td>
</tr>
<tr>
<td>2.7</td>
<td>0</td>
<td>0</td>
<td>10 hrs</td>
<td>1 docu</td>
<td>0</td>
<td>0</td>
<td>1 docu</td>
<td>1 week, by Oct. 10</td>
</tr>
</tbody>
</table>
Attachment 5

This questionnaire is the second stage in the project I am conducting at CCV. The purpose of this project is to promote the general welfare of people at CCV. The visions listed below are direct quotes from the staff and teachers' responses to the question, "What do you really want for yourself and for others as part of CCV, SE region."

The next steps are as follows:
1) Read the list of visions;
2) If you think of other visions, add them at the end of the list;
3) Go back and check those visions which you feel are also visions of yours, whether or not you wrote them, and
4) Go back and circle the five (5) numbers of your five highest priority (most important) visions.

Note: You may feel that some items on this list mean the same thing. All items are worded differently, and they are included so that people can treat them differently. If you feel different items mean the same thing, treat them the same—that is check or circle similarly.

What do you really want for yourself and for others as a part of CCV, SE region?

VISIONS:
___ 1) Education for self
___ 2) Education for students
___ 3) A more democratic decision making system
___ 4) Better communication on staffing responsibilities
___ 5) Continual assessment of program
___ 6) To see us work as a unit
___ 7) To plan jointly on how to reach our vision
___ 8) Spend regular time together doing management-by-objectives
___ 9) To reduce the separation and competition which can arise so easily in our region due to our geographical distance
___ 10) To feel that we are all part of a revolution in education
___ 11) Acquainting ourselves with other community colleges doing similar work
12) Feeling more knowledgeable about adult development theory
13) Begin to have a pride and increased motivation in our work
14) "Community" is the most important word in the name Community College of Vermont
15) Wanting to teach as a part of that community means wanting to share knowledge and stimulate the love of learning in other adults
16) Wanting to teach for the community college means wanting to give students pride in themselves and their work
17) Over the five years I've been connected with CCV, I've learned, grown, and gained as much as any of the students
18) The college produces very mature self-motivated learners—the kind this world needs
19) Establish reputation/standing in adult education in SE region
20) More adequate facility for adult education in Brattleboro
21) Same as above, specifically: classrooms
22) Same as above, specifically: accessibility vis-a-vis parking, handicapped, etc.
23) Same as above, specifically: a cooperative, community-wide facility
24) Same as above, specifically: library/resource/learning center
25) Same as above, specifically: administrative offices
26) Expanded recognition/promotion of adult ed. through CCV to encourage adults in self development both professionally and life-long learning
27) Means of identification/procurement of texts for instructional purposes and building resources for students
28) More experience in my field of teaching
29) A teaching job without the pressures of a more traditional institution
30) A chance to develop my own curriculum and try out new ideas
31) The freedom to fail with some of those new ideas
32) For my work at CCV to support me better financially, so that I might feel more professional about it, and put more time and energy into it

33) CCV should be a "way out" for people who otherwise would not get any more formal education

34) It should be a beginning, a process through which students can discover their strengths and interests

35) To give people in my community an opportunity to enrich their lives by learning the French language and about the culture

36) To contribute to my community by sharing my knowledge with others

37) To become an "expert" in curriculum development

38) To become an effective resource for teachers

39) To understand and implement the CCV philosophy and program

40) To know and respond to the community

41) To upgrade the image of CCV

42) Be accessible to all who desire an education

43) To provide learning opportunities

44) To work within an organization in which I truly like and respect co-workers

45) To know more about educational theories, resources of all kinds

46) To feel excited and motivated about what I do

47) To have freedom to experiment

48) To have a variety of tasks that use many or several aspects of my assets

49) To become more comfortable in dealing in group situations—leading meetings, teaching adults, outreach, etc.

50) To have flexibility—time, place, etc.

51) To be an interesting, informed person

52) To feel appreciated

53) To work with the public

54) To work part time and earn enough to exist comfortably

55) To provide income for myself and my family

56) To watch students change, grow, learn, improve
57) To use my creative energies to solve problems or make new improvements
58) To work closer to home
59) To live in a rural area
60) An opportunity to apply creative and effective educational practices
61) Want to learn more about effective teaching and learning
62) I want to know more about systems and their application
63) I want to work with people of good humor and intelligence
64) I want fiscal solvency for the institution
65) To have credibility within the community
66) Respect for students
67) Flexibility and a chance to experiment
68) To express myself, my caring and creativity in a context of being employed
69) To serve my community
70) To feel needed and useful
71) To help people learn to make choices for themselves
72) To help people gain power and control over their lives
73) To learn new skills for myself
74) To learn how to work better with others
75) To communicate better
76) To share my vision with others more effectively
77) To inspire myself and others
78) To become more capable of building bridges between my vision of the ideal and the reality around
79) To learn how to build a better sense of community
80) To help others gain similar skills for themselves
81) To be paid and feel that I am worth what I'm paid
82) To work towards a more just and thus a more safe and peaceful world
83) To exist in a state of love and peace
84) Rooms full of people having interesting conversations
85) Discouraged people discovering that they can learn and that they can control their learning and that they can make and act on choices

86) Many many excellent courses at all levels from basic skills to electronics to literature and to art, etc.

87) More money—higher pay all around

88) People all over the State saying that the best education available in the State is at CCV, SE region

89) To share what I know and feel is important with others

90) To help others gain an expanded awareness of themselves and their community

91) A reasonable remuneration for the time and energy I put into this activity

92) A broad variety of learning experiences to be made available to as many people as possible at as low a cost as possible
Attachment 6

Alan Hodson
c/o Mary Zabriskie
CCV Office
Brattleboro, VT 05301

October 21, 1980

Dear CCV Teachers:

Enclosed is the second stage of the implementation of the General Welfare Methodology at CCV. Unfortunately, not many teachers responded to the first stage. I hope all of you can respond to this second stage since this will enable you to be a part of this project. Your general welfare cannot be promoted through this Methodology unless you participate.

I am including a copy of the General Welfare Methodology for your information. I also hope this will entice you to participate.

In order to keep the process going, and to enable your input to be included, I need to have your response back to Mary Zabriskie by Tuesday, October 28.

Best wishes,

Alan Hodson

WAH: ms

Enclosures
**Attachment 7**

**Resource Allocation Chart**

For Step 3.0  
Date: 11-10-80

<table>
<thead>
<tr>
<th>Resources</th>
<th>a. CCVSE pop. time</th>
<th>b. CCVSE Dir. time</th>
<th>c. Appl'r time</th>
<th>d. Typing</th>
<th>e. Staff mtgs.</th>
<th>f. Mailings</th>
<th>g. Copying</th>
<th>h. Time-line</th>
</tr>
</thead>
<tbody>
<tr>
<td>Credits or (Debits)</td>
<td>—</td>
<td>—</td>
<td>—</td>
<td>—</td>
<td>—</td>
<td>—</td>
<td>—</td>
<td>—</td>
</tr>
<tr>
<td>Allocs. or (Changes)</td>
<td>1/3hr</td>
<td>1/3hr</td>
<td>20 hrs</td>
<td>4 docu</td>
<td>1</td>
<td>2</td>
<td>4 docu</td>
<td>2 weeks, by Oct. 24</td>
</tr>
<tr>
<td>Totals Now Available</td>
<td>1/3hr</td>
<td>1/3hr</td>
<td>20 hrs</td>
<td>4 docu</td>
<td>1</td>
<td>2</td>
<td>4 docu</td>
<td>2 weeks, by Oct. 24</td>
</tr>
</tbody>
</table>

**Step: 3.2**  
This step was combined with step 3.3.

| 3.3 | 1/3hr | 1/3hr | 10 hrs | 1 docu | 1 | 0 | 1 docu | 1 week, by Nov. 17 |

| 3.4 | This step was combined with step 3.3. |

| 3.5 | 0 | 0 | 2 hrs | 1 docu | 0 | 0 | 1 docu | 1 day, by Nov. 18 |

| 3.6 | This step was combined with steps 4.2-4.4. |

| 3.7 | This step was combined with step 4.5. |

| Totals Used | 1/3hr | 1/3hr | 12 hrs | 2 docu | 1 | 0 | 2 docu | 18 days, to Nov. 18 |

| Credits or (Debits) | 0 | 0 | 8 hrs | 2 docu | 0 | 2 | 2 docu | (10 days) |
At a meeting with teachers and staff, after the Director has selected four high priority visions for promotion:

1) The applier explains this stage of the GWM,
2) The applier states the purpose of defining,
3) The applier explains why four high priority visions were chosen for defining,
4) The visions to be defined are stated,
5) Staff and teachers are asked to group themselves according to which vision they would like to define. If there are not at least two people for each vision, people are asked to switch from the large to the small groups,
6) The applier asks each person to "Imagine that you have this vision to the fullest extent possible. Write down those things which indicate to you that it is present and/or happening in the most ideal way," and
7) The group is asked to consider and produce a final list of components.

3) (Amended) The applier explains why four visions need to be chosen for defining, then states the visions chosen by the Director, then asks if anyone wants to make any changes. If needed, a process is devised for choosing which four visions among a larger number chosen should be defined.
This questionnaire is the second stage in the project I am conducting at CCV. The purpose of this project is to promote the general welfare of people at CCV. The visions listed below are direct quotes from the staff and teachers' responses to the question, "What do you really want for yourself and for others as part of CCV, SE region."

The next steps are as follows:
1) Read the list of visions;
2) If you think of other visions, add them at the end of the list;
3) Go back and check those visions which you feel are also visions of yours, whether or not you wrote them, and
4) Go back and circle the five (5) numbers of your five highest priority (most important) visions.

Note: You may feel that some items on this list mean the same thing. All items are worded differently, and they are included so that people can treat them differently. If you feel different items mean the same thing, treat them the same—that is check or circle similarly.

What do you really want for yourself and for others as a part of CCV, SE region?

RESULTS: 10 points for each circle
1 point for each check

VISIONS:

28 1) Education for self
30 2) Education for students
16 3) A more democratic decision making system
16 4) Better communication on staffing responsibilities
 5 5) Continual assessment of program
16 6) To see us work as a unit
 3 7) To plan jointly on how to reach our vision
12 8) Spend regular time together doing management-by-objectives
 6 9) To reduce the separation and competition which can arise so easily in our region due to our geographical distance
13 10) To feel that we are all part of a revolution in education
 5 11) Acquainting ourselves with other community colleges doing similar work
25 12) Feeling more knowledgeable about adult development theory

4 13) Begin to have a pride and increased motivation in our work

1 14) "Community" is the most important word in the name Community College of Vermont

5 15) Wanting to teach as a part of that community means wanting to share knowledge and stimulate the love of learning in other adults

4 16) Wanting to teach for the community college means wanting to give students pride in themselves and their work

2 17) Over the five years I've been connected with CCV, I've learned, grown, and gained as much as any of the students

13 18) The college produces very mature self-motivated learners—the kind this world needs

16 19) Establish reputation/standing in adult education in SE region

28 20) More adequate facility for adult education in Brattleboro

5 21) Same as above, specifically: classrooms

3 22) Same as above, specifically: accessibility vis-à-vis parking, handicapped, etc.

4 23) Same as above, specifically: a cooperative, community-wide facility

5 24) Same as above, specifically: library/resource/learning center

2 25) Same as above, specifically: administrative offices

16 26) Expanded recognition/promotion of adult ed. through CCV to encourage adults in self development both professionally and life-long learning

24 27) Means of identification/procurement of texts for instructional purposes and building resources for students

13 28) More experience in my field of teaching

4 29) A teaching job without the pressures of a more traditional institution

24 30) A chance to develop my own curriculum and try out new ideas

2 31) The freedom to fail with some of those new ideas
For my work at CCV to support me better financially, so that I might feel more professional about it, and put more time and energy into it.

CCV should be a "way out" for people who otherwise would not get any more formal education.

It should be a beginning, a process through which students can discover their strengths and interests.

To give people in my community an opportunity to enrich their lives by learning the French language and about the culture.

To contribute to my community by sharing my knowledge with others.

To become an "expert" in curriculum development.

To become an effective resource for teachers.

To understand and implement the CCV philosophy and program.

To know and respond to the community.

To upgrade the image of CCV.

Be accessible to all who desire an education.

To provide learning opportunities.

To work within an organization in which I truly like and respect co-workers.

To know more about educational theories, resources of all kinds.

To feel excited and motivated about what I do.

To have freedom to experiment.

To have a variety of tasks that use many or several aspects of my assets.

To become more comfortable in dealing in group situations--leading meetings, teaching adults, outreach, etc.

To have flexibility--time, place, etc.

To be an interesting, informed person.

To feel appreciated.

To work with the public.

To work part time and earn enough to exist comfortably.

To provide income for myself and my family.

To watch students change, grow, learn, improve.
14) To use my creative energies to solve problems or make new improvements
14) To work closer to home
14) To live in a rural area
5) An opportunity to apply creative and effective educational practices
4) Want to learn more about effective teaching and learning
2) I want to know more about systems and their application
39) I want to work with people of good humor and intelligence
6) I want fiscal solvency for the institution
17) To have credibility within the community
16) Respect for students
4) Flexibility and a chance to experiment
14) To express myself, my caring and creativity in a context of being employed
4) To serve my community
7) To feel needed and useful
16) To help people learn to make choices for themselves
27) To help people gain power and control over their lives
7) To learn new skills for myself
4) To learn how to work better with others
7) To communicate better
6) To share my vision with others more effectively
4) To inspire myself and others
3) To become more capable of building bridges between my vision of the ideal and the reality around
2) To learn how to build a better sense of community
2) To help others gain similar skills for themselves
8) To be paid and feel that I am worth what I'm paid
16) To work towards a more just and thus a more safe and peaceful world
4) To exist in a state of love and peace
1) Rooms full of people having interesting conversations
Discouraged people discovering that they can learn and that they can control their learning and that they can make and act on choices

Many many excellent courses at all levels from basic skills to electronics to literature and to art, etc.

More money—higher pay all around

People all over the State saying that the best education available in the State is at CCV, SE region

To share what I know and feel is important with others

To help others gain an expanded awareness of themselves and their community

A reasonable remuneration for the time and energy I put into this activity

A broad variety of learning experiences to be made available to as many people as possible at as low a cost as possible
## Attachment 10

### Resource Allocation Chart

**For Step 4.0** | **Date: 11-28-80**

<table>
<thead>
<tr>
<th>Resources</th>
<th>a.</th>
<th>b.</th>
<th>c.</th>
<th>d.</th>
<th>e.</th>
<th>f.</th>
<th>g.</th>
<th>h.</th>
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</thead>
<tbody>
<tr>
<td>Credits or (Debits)</td>
<td>0</td>
<td>0</td>
<td>8 hrs</td>
<td>2 docu</td>
<td>0</td>
<td>2</td>
<td>2 docu</td>
<td>(10 days)</td>
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<tr>
<td>Allocs. or (Changes)</td>
<td>1/3hr</td>
<td>1/3hr</td>
<td>10 hrs</td>
<td>1 docu</td>
<td>0</td>
<td>1</td>
<td>1 docu</td>
<td>1 week, by Oct. 31</td>
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<tr>
<td>Totals Now Available</td>
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<td>1/3hr</td>
<td>18 hrs</td>
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<td>0</td>
<td>3</td>
<td>3 docu</td>
<td>1 week, (by Dec. 5)</td>
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<td>4.3</td>
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<td>1</td>
<td>0</td>
<td>1 docu</td>
<td>1 week, by Dec. 5</td>
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<td>1 docu</td>
<td>0</td>
<td>0</td>
<td>1 docu</td>
<td>1 day, by Dec. 6</td>
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<td>1/3hr</td>
<td>12 hrs</td>
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<td>1</td>
<td>0</td>
<td>2 docu</td>
<td>5 days, to Dec. 3</td>
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<tr>
<td>Credits or (Debits)</td>
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<td>0</td>
<td>6 hrs</td>
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<td>(1)</td>
<td>3</td>
<td>1 docu</td>
<td>2 days</td>
</tr>
</tbody>
</table>
This questionnaire is the third state in the project I am conducting at CCV. The purpose of the Methodology being implemented is, "to promote the general welfare of the people at CCV."

The items listed below were generated by the CCV staff and teachers as definitions of the chosen visions. The visions defined were chosen by CCV staff and teachers as high priority visions which could and should be promoted at CCV. Each item was selected as a part or component of the vision written above it.

The next steps are as follows:
1) Read the lists of components;
2) Put a check by each component which is part of your definition of the vision written above it;
3) Go back and circle the numbers of the three (3) most important components of each vision; and
4) Indicate to what extent (from 0% to 100% in intervals of 10) each of the components is met at this time. For example, write '20' next to an item if you believe this component is 20% met (and therefore 80% unmet).

<table>
<thead>
<tr>
<th>% met</th>
<th>checks</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Vision 1: Education for self

1) Learning center and library
2) Funding for learning center and library
3) Peer enrichment seminars
4) Funding for experts in the field to come talk to us, and us to them
5) Time during working hours for study
6) Creative planning and change at least every year—to help us on the cutting edge of education in the system and in the State
7) Freedom to grow professionally
8) Money for persons to cover while we do the above

Vision 63: I want to work with people of good humor and intelligence

1) People that are quick
2) People that don't take themselves too seriously
3) Clever people
4) Witty people
5) People not moody
6) Good natured people
7) People who can be silly
8) Script writers for material
9) Staff meetings
10) Telephone conversations
11) Articulate people
12) People with a sense of the absurd
13) People with a perspective
14) People with a sense of timing
15) Open area for meetings
16) Books
17) People
18) Writing
19) Media--films
20) Creativity
21) Offices separate but linking
22) Interesting conversation
23) Conferences
24) People with diverse interests
25) Resource people

Vision 72: To help people gain power and control over their lives

1) Students with the ability to negotiate their needs as students
2) Staff with the ability to negotiate their needs as citizens
3) Students communicating openly about needs and problems
4) Staff communicating openly about needs and problems
5) Students learning how to make choices
6) Staff learning how to make choices
7) Students making decisions
8) Staff making decisions
9) Students with time management skills
10) Staff with time management skills
11) Staff having access to the decision making process
12) Students having access to information
13) Staff having access to information
14) Students assuming they have a say in things and demanding a part in planning and change
15) Staff assuming they have a say in things and demanding a part in planning and change
16) Students learning to act on their awareness and choices
17) Staff learning to act on their awareness and choices
18) Students learning about responsibility
19) Staff learning about responsibility
20) Students able to work at a variety of interests
21) Staff able to work at a variety of interests
22) Empowerment integrated into Degree Program courses—technical skills for completing Degree Plan
23) Instructors integrating skills in analyzing, negotiating, and developing personal and social ethical principles into classes
24) Supportive setting where students can practice their ethical principles in practical situations to resolve conflicts that might arise between their principles and actions
Attachment 12

This questionnaire is the third state in the project I am conducting at CCV. The purpose of the Methodology being implemented is, "to promote the general welfare of the people at CCV."

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RESULTS: 10 points for each circle; 1 point for each check

<table>
<thead>
<tr>
<th>Mean % met</th>
<th>Priority Points</th>
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<tr>
<td>Vision 1: Education for self</td>
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<tr>
<td>10 27</td>
<td>1) Learning center and library</td>
</tr>
<tr>
<td>14 35</td>
<td>2) Funding for learning center and library</td>
</tr>
<tr>
<td>4 35</td>
<td>3) Peer enrichment seminars</td>
</tr>
<tr>
<td>3 36</td>
<td>4) Funding for experts in the field to come talk to us, and us to them</td>
</tr>
<tr>
<td>16 37</td>
<td>5) Time during working hours for study</td>
</tr>
<tr>
<td>28 34</td>
<td>6) Creative planning and change at least every year--to help us on the cutting edge of education in the system and in the State</td>
</tr>
<tr>
<td>53 45</td>
<td>7) Freedom to grow professionally</td>
</tr>
<tr>
<td>1 15</td>
<td>8) Money for persons to cover while we do the above</td>
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</table>

| Vision 63: I want to work with people of good humor and intelligence |
| 70 16 | 1) People that are quick |
| 61 37 | 2) People that don't take themselves too seriously |
| 69 18 | 3) Clever people |
| 60 7 | 4) Witty people |
| 53 2 | 5) People not moody |
| 81 28 | 6) Good natured people |
50 4 7) People who can be silly
10 2 8) Script writers for material
91 24 9) Staff meetings
77 3 10) Telephone conversations
75 16 11) Articulate people
50 27 12) People with a sense of the absurd
76 26 13) People with a perspective
50 4 14) People with a sense of timing
36 3 15) Open area for meetings
36 3 16) Books
89 3 17) People
43 3 18) Writing
36 4 19) Media--films
61 25 20) Creativity
29 3 21) Offices separate but linking
61 17 22) Interesting conversation
29 5 23) Conferences
63 26 24) People with diverse interests
47 4 25) Resource people

Vision 72: To help people gain power and control over their lives

30 17 1) Students with the ability to negotiate their needs as students
69 2 2) Staff with the ability to negotiate their needs as citizens
37 2 3) Students communicating openly about needs and problems
61 46 4) Staff communicating openly about needs and problems
47 5 5) Students learning how to make choices
76 3 6) Staff learning how to make choices
50 3 7) Students making decisions
73 3 8) Staff making decisions
31 3 9) Students with time management skills
59 26 10) Staff with time management skills
53 14 11) Staff having access to the decision making process
60 2 12) Students having access to information
67 4 13) Staff having access to information
17 12 14) Students assuming they have a say in things and demanding a part in planning and change
51 14 15) Staff assuming they have a say in things and demanding a part in planning and change
43 2 16) Students learning to act on their awareness and choices
60 3 17) Staff learning to act on their awareness and choices
53 12 18) Students learning about responsibility
70 2 19) Staff learning about responsibility
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<td>Students able to work at a variety of interests</td>
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<tr>
<td>64</td>
<td>13</td>
<td>21</td>
<td>Staff able to work at a variety of interests</td>
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<tr>
<td>27</td>
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<td>22</td>
<td>Empowerment integrated into Degree Program courses—( \frac{1}{2} ) empowerment process, ( \frac{1}{2} ) technical skills for completing Degree Plan</td>
</tr>
<tr>
<td>21</td>
<td>35</td>
<td>23</td>
<td>Instructors integrating skills in analyzing, negotiating, and developing personal and social ethical principles into classes</td>
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<tr>
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<td>1</td>
<td>24</td>
<td>Supportive setting where students can practice their ethical principles in practical situations to resolve conflicts that might arise between their principles and actions</td>
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## Informal Rating Sheet

<table>
<thead>
<tr>
<th>Vision/Component</th>
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<td>46</td>
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<tr>
<td>1/5</td>
<td>16</td>
<td>37</td>
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* = best
+ = good
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## Resource Allocation Chart

**For Step: 5.0**  
**Date: 12-03-80**

<table>
<thead>
<tr>
<th>a. CCVSE pop. time</th>
<th>b. CCVSE Dir. time</th>
<th>c. Appl'r time</th>
<th>d. Typing</th>
<th>e. Staff mtgs.</th>
<th>f. Mailings</th>
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<th>h. Timeline</th>
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<td>0</td>
<td>6 hrs</td>
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<td>3</td>
<td>1 docu</td>
<td>2 days</td>
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</table>

5.3 No further steps were needed for this application.

| 5.4 |
| 5.5 |
| 5.6 |
| 5.7 |

| Totals Used | 0 | 2/3hr | 3 hrs | 0 | 0 | 0 | 0 | 0 | 4 weeks, to Dec. 30 |
| Credits or (Debits) | 0 | 0 | 13 hrs | 1 docu | 0 | 3 | 2 docu (3 weeks) |
### Attachment 15

#### Resource Allocation Chart

For Step 6.0  
Date: 12-30-80

<table>
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<tr>
<th>a. CCVSE pop. time</th>
<th>b. CCVSE Dir. time</th>
<th>c. Appl'r time</th>
<th>d. Typing</th>
<th>e. Staff mtgs.</th>
<th>f. Mailings</th>
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<td>1.5 hr</td>
<td>50 hrs</td>
<td>1 docu</td>
<td>2</td>
<td>1</td>
<td>1 docu 5 weeks, by Dec. 12</td>
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<tr>
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<td>1.5 hr</td>
<td>63 hrs</td>
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<td>2</td>
<td>4</td>
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<tr>
<td></td>
<td>6.3</td>
<td>1/3 hr</td>
<td>3/4 hr</td>
<td>20 hrs</td>
<td>0</td>
<td>1</td>
<td>0 1 docu 5 weeks, by Mar. 5</td>
</tr>
<tr>
<td></td>
<td>6.4</td>
<td></td>
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<td></td>
<td></td>
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<td>This step was combined with step 7.0</td>
</tr>
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<td>50 hrs</td>
<td>0</td>
<td>2</td>
<td>0</td>
<td>1 docu 8 weeks, to Mar. 10</td>
</tr>
<tr>
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<td>13 hrs</td>
<td>2 docu</td>
<td>0</td>
<td>4</td>
<td>2 docu (1 week)</td>
</tr>
</tbody>
</table>
Attachment 16

Implementation Elements for Vision Components

as decided by CCV staff

Cut off date for this stage of implementation:

March 3, 1981

Vision 1: Education for self

Component 2: Funding for learning center and library

1) Mary Zabriskie, Sherry Blankenship, and Nancy Chard will develop and submit a process for implementation.
2) A bookshelf with books will be installed.
3) A bibliography will be developed.
4) Staff development materials will be secured.
5) See also component 5.

Component 3: Peer enrichment seminars

1) Elinore Towle will develop and submit a proposal for implementation.
2) Staff development topic meetings will be organized.
3) A mechanism for selecting topics will be developed.
4) A needs assessment will be done.
5) A schedule for these meetings will be established.
6) See also components 4 and 5.

Component 4: Funding for experts in the field to come talk to us, and us to them

1) Diana Wahle will develop and submit a proposal for implementation.
2) Tie-ins with component 3 will be explored.
3) Renting videotapes will be pursued.
4) College-wide adult development workshops will be incorporated into the plan.
5) Staff going to visit other places will be pursued.
6) Staff going to workshops will be pursued.
7) Getting on mailing lists will be pursued.
8) A needs assessment will be done.
9) See also components 3 and 5.

Component 5: Time during working hours for study

1) This should be tied in with component 10 of vision 72, "Staff with time management skills," which in turn should be part of components 2, 3,
and 4 of vision 1.
2) A time for staff when they are "unavailable" to the public should be tried.
3) A place for staff to be "unavailable" to the public should be explored.

Vision 63: I want to work with people of good humor and intelligence.
CCV staff decided that this vision was largely met, and not practically implementable.

Vision 72: To help people gain power and control over their lives
Component 10: Staff with time management skills
    See component 5 of vision 1 above.
The following components were combined and redefined as 3), 4), and 5) below:
Component 1: Students with the ability to negotiate their needs as students
Component 4: Staff communicating openly about needs and problems
Component 23: Instructors integrating skills in analyzing, negotiating, and developing personal and social ethical principles into classes

1) Tim Cowles will develop and submit a proposal for implementation.
2) Staff will submit ideas for proposal to Tim by February 24.
The following will be covered in the proposal:
3) How to integrate specific skill development, including cognitive processes, into courses
4) How to increase students' skills in negotiating their needs
5) How to increase teachers' skills in negotiating with students
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<tr>
<th></th>
<th>a. CCVSE pop. time</th>
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<th>c. Appl'r time</th>
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</tr>
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<td>2/3hr</td>
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<td>5</td>
<td>3 docu</td>
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</tr>
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<tr>
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<td>10 hrs</td>
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<td>8 days, to Mar. 13</td>
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<td>(1 day)</td>
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Attachment 18

The purpose of this instrument is to help evaluate this application of the General Welfare Methodology at CCV, Southeastern Region. You have been a vital part of this application since its beginning in September, 1980. Given the limited time of the application to date, we cannot expect the general welfare to be ideal yet. I expect the outcomes of the application will continue after this evaluation. However, it is necessary to measure the accomplishments to date.

During the past seven weeks you have helped to implement those elements which you selected as the means of promoting your vision components. These components and their elements are listed below, along with evaluation questions. The primary criterion for the evaluation is, to what extent has this application accomplished its stated purpose: to promote the general welfare of people at CCV, Southeastern Region?

Please answer the questions below only according to accomplishments to date, not what you think might happen.

1) For each element listed below, please write in the amount you believe this element has been accomplished to date (from 0% to 100% in intervals of 10). For example, write 50% next to an element if you believe it has been 50% accomplished (and therefore 50% not accomplished).

% accomplished

Vision 1: EDUCATION FOR SELF

Component 2: Funding for learning center and library

1) Mary Zabriskie, Sherry Blankenship, and Nancy Chard will develop and submit a process for implementation.
2) A bookshelf with books will be installed.
3) A bibliography will be developed.
4) Staff development materials will be secured.
5) Staff should arrange time during working hours for study.

Component 3: Peer enrichment seminars

1) Elinore Towle will develop and submit a proposal for implementation.
2) Staff development topic meetings will be organized.
3) A mechanism for selecting topics will be developed.
4) A needs assessment will be done.
5) A schedule for these meetings will be established.
6) Coordination with Component 4 will be carried out.

Component 4: Funding for experts in the field to come talk to us, and us to them
1) Diana Wahle will develop and submit a proposal for implementation.
2) Tie-ins with Component 3 will be explored.
3) Renting videotapes will be pursued.
4) College-wide adult development workshops will be incorporated into the plan.
5) Staff going to visit other places will be pursued.
6) Staff going to workshops will be pursued.
7) Getting on mailing lists will be pursued.
8) A needs assessment will be done.

Component 5: Time during working hours for study
1) A time for staff when they are "unavailable" to the public should be tried.
2) A place for staff to be "unavailable" to the public should be explored.
3) As needed, staff should develop time management skills.

Vision 72: TO HELP PEOPLE GAIN POWER AND CONTROL OVER THEIR LIVES

Components: a) To integrate specific skill development, including cognitive processes, into courses
b) To increase students' skills in negotiating their needs
c) To increase teachers' skills in negotiating with students

1) Tim Cowles will develop and submit a proposal for implementation.
2) Staff will submit ideas for proposal to Tim.

2) For each component listed below, please write the amount you believe this component is met at this time (from 0% to 100% in intervals of 10). For example, write 50% next to a component if you believe it is 50% met (and therefore 50% unmet).
**Vision 1: EDUCATION FOR SELF**

Component 2: Funding for learning center and library

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Component 3: Peer enrichment seminars

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Component 4: Funding for experts in the field to come talk to us, and us to them

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Component 5: Time during working hours for study

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**Vision 72: TO HELP PEOPLE GAIN POWER AND CONTROL OVER THEIR LIVES**

Component a: Specific skill development, including cognitive processes, will be integrated into courses.

Component b: Students' skills in negotiating their needs will be increased.

Component c: Teachers' skills in negotiating with students will be increased.

3) For each component listed below, please circle the number which best indicates for you the result to date of implementing the component. A "1" would indicate that the implementation has made things worse; "5" would indicate that it has made things better; "3" would indicate no change; "2" and "4" are intermediate ratings.

**Vision 1: EDUCATION FOR SELF**

Component 2: Funding for learning center and library

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Component 3: Peer enrichment seminars

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Component 4: Funding for experts in the field to come talk to us, and us to them

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<td>better</td>
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Component 5: Time during working hours for study

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<td>worse</td>
<td>no change</td>
<td>better</td>
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</tbody>
</table>
Vision 72: TO HELP PEOPLE GAIN POWER AND CONTROL OVER THEIR LIVES

Component a: Specific skill development, including cognitive processes, will be integrated into courses.

1 worse  2 no change  3  4  5 better

Component b: Students' skills in negotiating their needs will be increased.

1 worse  2 no change  3  4  5 better

Component c: Teachers' skills in negotiating with students will be increased.

1 worse  2 no change  3  4  5 better

4) To what extent do you believe the general welfare of people at CCV, Southeastern Region, has been promoted by this application of the General Welfare Methodology?

1 worse  2 no change  3  4  5 better
TO: Staff  
FROM: Diana  
DATE: 03-09-81  
RE: Component 4: Vision Building/Education for Self Funding for Experts in the Field to Come Talk to Us and Us to Them

Proposed Steps:

By April 15th:
1. In the first meeting of the Peer Enrichment Seminars organized by Elinore, an evaluation will be done of the education topics of most interest to the staff to pursue regionally.

By April 22nd:
2. A memo will be drafted and sent to Myrna reflecting our regional training interests, which could be met by State-wide events.

By April 22nd:
3. Through talking with other staff a summary list will be made of periodicals and other resources which would offer us information on our education interests.
   - If we are not already on the mailing list for these resources, DW will place us on it.
   - If there is cost involved, a proposal will be made to NC.

By May 1st:
4. A bulletin area will be organized in each office posting the events which relate to our educational interests--kept up by a different staff person each month to be organized by DW.

Ongoing:
5. A survey of videotapes and other resources (people) available on the topic for the Peer Enrichment Seminar plans will be made 6 weeks ahead of each seminar, so that relevant tapes can be ordered for the seminar by DW.

By April 15th:
6. The budgetary allowance for these resources will be discussed with NC.

I hope these proposed steps compliment the Peer Enrichment Planning done by Elinore and welcome comments.
Attachment 20

TO: Staff  
FROM: Elinore T.  
DATE: 02-29-81  
RE: Peer Enrichment Seminars - Component 3  
A Sketchy Proposal

Time Frame: Once a month, 2 hours  
Alternating a resource person one month and a presentation by staff member on alternate month.

Preparation: an appropriate, if modest, amount of reading to generate ideas suggested 2 weeks ahead by leader

Focus: To promote new and creative thought about our mutual pursuit at CCV.

Mechanism: Committee or staff voting

Examples: Adult development - as a backdrop to understanding adult students and as a frame of reference for understanding our own stage of development and how that stage might affect our job.

How many/most disciplines are being rethought in terms of systems thinking - organization

Presentation of programs of other new programs from similar schools - call.
TO: Southeast Staff  
FROM: Sherry  
RE: Implementation of Component 2  
DATE: March 5, 1981

The following were proposals and suggestions that were the outcome of the Vision 1 meeting.

- Staff Development budget of $300.
- Bibliography of resources available in Brattleboro is now available, and located on a shelf in Nancy's office.
- Bibliography for Springfield is forthcoming.
- A shelf is now available and will soon be organized.
- By July 1, the current bibliography will be annotated with comments by any readers.
- Staff is encouraged to bring in pertinent books by May 1 to be available to other staff members. It would be helpful to have comments and criticisms with any of these.
- Suggestions on materials, resources, etc., are to be given to Mary. The staff will then rank the materials, ordering those of highest priority (that fit the budget).
- The Vision 1 committee recommends that each staff person schedule an hour to an hour and a half per week for professional development.
- At the last staff meeting (June 16) the staff will be given the opportunity to review this process.
- A time management workshop is available as part of the professional development. Sherry will give details.
- Any books signed out will be recorded in a notebook on an honor system. You may keep the book for three weeks.
Attachment 22

BIBLIOGRAPHY FOR STAFF DEVELOPMENT

CCV-OWNED BOOKS HOUSED IN BRATTLEBORO OFFICE


Attachment 23

BIBLIOGRAPHY FOR STAFF DEVELOPMENT

STAFF-OWNED BOOKS HOUSED IN BRATTLEBORO OFFICE


Jencks, Christopher and Riesman, David. The Academic


CASSETTES

Bloo, Benjamin. *New Views of the Learner.*


Comer, James. *Forces Affecting Curriculum.*


Tyler, Ralph. *Desirable Content for Curriculum Development Syllabus Today.*
The purpose of this instrument is to help evaluate this application of the General Welfare Methodology at CCV, Southeastern Region. You have been a vital part of this application since its beginning in September, 1980. Given the limited time of the application to date, we cannot expect the general welfare to be ideal yet. I expect the outcomes of the application will continue after this evaluation. However, it is necessary to measure the accomplishments to date.

During the past seven weeks you have helped to implement those elements which you selected as the means of promoting your vision components. These components and their elements are listed below, along with evaluation questions. The primary criterion for the evaluation is, to what extent has this application accomplished its stated purpose: to promote the general welfare of people at CCV, Southeastern Region?

Please answer the questions below only according to accomplishments to date, not what you think might happen.

1) For each element listed below, please write in the amount you believe this element has been accomplished to date (from 0% to 100% in intervals of 10). For example, write 50% next to an element if you believe it has been 50% accomplished (and therefore 50% not accomplished).

RESULTS: N=9

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<td>22.2</td>
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Component 3: Peer enrichment seminars

| 94.4 | 1) Elinore Towle will develop and submit a proposal for implementation. |
| 17.2 | 2) Staff development topic meetings will be organized. |
| 45.0 | 3) A mechanism for selecting topics will be developed. |
2.2

4) A needs assessment will be done.

24.4

5) A schedule for these meetings will be established.

37.8

6) Coordination with Component 4 will be carried out.

Component 4: Funding for experts in the field to come talk to us, and us to them

90.0

1) Diana Wahle will develop and submit a proposal for implementation.

58.9

2) Tie-ins with Component 3 will be explored.

28.3

3) Renting videotapes will be pursued.

12.2

4) College-wide adult development workshops will be incorporated into the plan.

8.9

5) Staff going to visit other places will be pursued.

18.3

6) Staff going to workshops will be pursued.

21.7

7) Getting on mailing lists will be pursued.

5.6

8) A needs assessment will be done.

Component 5: Time during working hours for study

24.4

1) A time for staff when they are "unavailable" to the public should be tried.

21.1

2) A place for staff to be "unavailable" to the public should be explored.

19.4

3) As needed, staff should develop time management skills.

Vision 72: TO HELP PEOPLE GAIN POWER AND CONTROL OVER THEIR LIVES

Components: a) To integrate specific skill development, including cognitive processes, into courses

b) To increase students' skills in negotiating their needs

c) To increase teachers' skills in negotiating with students

4.4

1) Tim Cowles will develop and submit a proposal for implementation.

23.3

2) Staff will submit ideas for proposal to Tim.

2) For each component listed below, please write the amount you believe this component is met at this time (from 0% to 100% in intervals of 10). For example, write 50% next to a component if you believe it is 50% met (and therefore 50% unmet).
Mean % met

Vision 1: EDUCATION FOR SELF

Component 2: Funding for learning center and library
Mean = 66.7

Component 3: Peer enrichment seminars
Mean = 34.4

Component 4: Funding for experts in the field to come talk to us, and us to them
Mean = 47.8

Component 5: Time during working hours for study
Mean = 25.6

Vision 72: TO HELP PEOPLE GAIN POWER AND CONTROL OVER THEIR LIVES

Component a: Specific skill development, including cognitive processes, will be integrated into courses.
Mean = 7.8

Component b: Students' skills in negotiating their needs will be increased.
Mean = 10.0

Component c: Teachers' skills in negotiating with students will be increased.
Mean = 12.2

3) For each component listed below, please circle the number which best indicates for you the result to date of implementing the component. A "1" would indicate that the implementation has made things worse; "5" would indicate that it has made things better; "3" would indicate no change; "2" and "4" are intermediate ratings.

Vision 1: EDUCATION FOR SELF

Component 2: Funding for learning center and library
Mean = 4.1

Component 3: Peer enrichment seminars
Mean = 3.6

Component 4: Funding for experts in the field to come talk to us, and us to them
Mean = 3.4

Component 5: Time during working hours for study
Mean = 3.7
Vision 72: TO HELP PEOPLE GAIN POWER AND CONTROL OVER THEIR LIVES

Component a: Specific skill development, including cognitive processes, will be integrated into courses.

Mean=3.4

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Component b: Students' skills in negotiating their needs will be increased.

Mean=3.2

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Component c: Teachers' skills in negotiating with students will be increased.

Mean=3.3

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<tr>
<td>worse</td>
<td>no change</td>
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4) To what extent do you believe the general welfare of people at CCV, Southeastern Region, has been promoted by this application of the General Welfare Methodology?

Mean=4.0

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