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EFFECTIVE FINANCIAL MANAGEMENT IN EDUCATION
The case of Greek State Schools

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ZUSAMMENFASSUNG

Finanzmanagement im Bildungswesen ist ein neues Element zur Diskussion in Griechenland da, -anhand der Griechischen Verfassung –ist es des Staates ununterbrochene Sorge und Pflicht kostenlose Bildung seinen Burgern zu gewahren. Bisher sind die Finanzen im Rahmen des Bildungswesens nur im Bereich des Staatshaushaltes für das Bildungswesen zu finden oder in Verbindung mit dem Brutto Sozial Produkt (BSP). Dennoch ist eine zusätzliche finanzielle Diskussion, des Bildungswesens betreffend, aus den heutzutage komplizierten Prozessen in der Verwaltung einer staatlichen Schule hervorgetreten.

Diese Studie bestrebt Licht in dem Finanzmanagement der staatlichen Schulen in Griechenland zu bringen- ein wahrscheinlich unteschatzter Aspekt der Verwaltungsaufgaben des Schuldirektors- uund es mit der Qualität und den Standards in der Schule zu verbinden. Sie betrachtet das Finanzmanagement nicht wie eine Reihe von statischen , bürokratischen Prozessen, sondern wie einen komplizierten, dynamischen Aspekt der Managementfähigkeiten des Direktors. Um die Ziele dieser Studie zu erreichen, wurde die Inhalt Analyse der Gesetzgebenden Dokumente angewendet, zusammen mit einer Forschung, im kleinen Umfang, des Schukdirektorhaltungen im Bezug zu Themen der Verwaltung.

INTRODUCTION

According to Greek Constitution, Education is a social and individual right and it must be “shared and cherished” by everyone living within the boundaries of the Hellenic State. So, it is the State’s unremitting care and obligation to provide Education freely for its citizens.

Consequently, the Financial Management in Education is a new element for discussion in Greece. So far, Finance within the Educational Framework was seen only at the level of the National Budget Share or in connection with the Gross National Product (GNP). In other words, what mattered was the amount of money spent or to be spent on Education.

Further financial discussion concerning Education stemmed out from complicated procedures in managing a state school nowadays and it is strongly influenced by the relevant literature in other countries, such as the UK, the USA, etc. In these countries parents pay fees (fully or partially) for the education of their children, so they expect “value for money”. Moreover, schools function more as profit-oriented¹ organizations and need financial management. In the example of Anglo-saxon type of schooling, the school management team has full responsibility for the generation and the allocation of resources.

As a subject of research in Greece Financial Management in Education can be placed within the broader scope of School Management (or Management in Education). School Management itself is recently introduced in Teacher Training School Curricula². The Greek Educational System is more centralized: funding and general financial management is the responsibility of the Ministry of National Education and Religious Affairs (called from now on MiNERA, for brevity’s sake) and its decentralized services, named Educational Directorates (EDs) along with the Local Authorities (LAs).

¹ Profit is not only money from fees but also high school performance and fame which-in turn- leads to profit.

² Primary School Teacher Initial Training Schools have incorporated School Management (and Financial Management in Education) as a distinct teaching subject in their curricula. However, Secondary Teacher Initial Training Schools- being more traditionally and theoretically oriented and focusing more on teaching methods than on the teaching practice as a whole – tend to minimize the importance of Management and Finance in Education. Or, to exclude it from their curricula, as they think it is a rather entrepreneurial activity not appropriate for their academic and/or educational contexts. Secondary teachers usually become engaged with aspects of School Management and Leadership during in-service Teacher Training Courses or Post-graduate studies (Argyropoulou,2004).

PART ONE

1. OBJECTIVES

This paper aspires to shed light to State School Financial Management in Greece- a rather underestimated aspect of the Headteachers' managerial duties – and to relate it to the quality and standards in the school. It sees Financial Management not only as a series of static bureaucratic procedures but as a complicated dynamic aspect of the Head's managerial capabilities. Last but not least, it attempts to provide a new perspective for dealing with Financial Management in schools, as it contains implications for further study and discussion.

2. KEY QUESTIONS

The following questions are central to the investigation of the nature of Financial Management in State Schools, the responsibilities of the Headteachers and the possibilities of improving quality criteria in the State School.

A.

A. How are schools funded in Greece?

- What are the financial roles and responsibilities of the Head? Are they clearly defined and understood?
- Are the Heads prepared to undertake the defined responsibilities?
- To what extent can a Head make decisions?

B.

- Are there sufficient resources?
- How do resource levels compare with those of other similar schools?
- Are the resources available at the right time so as to meet priorities?

C.

- Is a budget prepared? Is it prepared before or after the acquisition of resources?
- Does the Head review and evaluate the outcomes of the annual expenditure?
- Is there efficient financial control within the school as well as external auditing?

D.

- Are there any channels for communication and decision making between the Head and the teachers and/or parents concerning priorities in expenditure?
- Is there a school plan setting down priorities? Are these priorities always met? Why or why not?

3. METHODOLOGY

The identification of the objectives helped to choose the research method and instrument. Responding to the key questions demands information from various backgrounds as well as different ways to draw it.

To be more specific:

The statutory framework of School Financial Management and the Head's responsibilities are designated by the Law, so Document or Content Analysis has been implemented. The same applies to Literature relevant to School Financial Management (SFM) as a whole. Additionally, it was thought wise to find out how Heads feel about SFM or what actions they take while performing it. Therefore, a

small-scale research was designed aiming at collecting data about Heads' attitudes. Research was carried out using questionnaires.

4. LITERATURE REVIEW

Literature regarding the financial dimension of State Schools³ in Greece may be divided into four large groups:

- Studies, articles or books dealing with the National Budget funds allocated to Education and /or outlines of the historical development of Education Rates in the National Gross Product (NGP). These studies usually consider Education as a whole and they inter-relate it with the general economic development of the country⁴.
- More recent references (appearing mostly in newspapers or periodicals) discussing mainly the yearly amounts of money spend privately on tuition, foreign languages learning (outside school curricula), music lessons, ballet or gym classes, school equipment, etc.⁵
- Practical Guides for School Heads offering instructions of how Heads will be able to cope with SFM routine in their schools.⁶
- There are also a few isolated papers concerning either the utility of teaching SFM Principles to Teacher Trainees or the organization and functioning of the School Committee.⁷

But the management of financial affairs of a State School has never been considered as a separate and distinct managerial activity and was never treated as such in Greek Literature. Also, very rarely has it been regarded as part of the managerial cycle of the School.

On the State side, however, there is a bulk of legislative regulations arranging and / or designating the SFM details, which the Head should know or have access to. Despite that, the MiNERA has never [so far] issued a Handbook or a Guide to the Law to facilitate the Head's work. As all this legislation is more or less normative, the SFM is thought a rather burdensome duty.

³ The majority of schools in Greece are State Schools. The small minority of Private Schools are either commercial enterprises or charities or non-profit organizations. Private schools are self-funded, that is: they do not receive any type of allowance from the State. Accordingly, their financial management style totally differs from that of State Schools. Another important difference between State and Private Schools is their catchment area: State School catchment area is limited and specified by the MiNERA, while Private Schools can attract students from various areas.

⁴ In this group writers, such as Pematoglou(1987), Drettakis(1998), A.Saiti (2000) and Douskos (2002) should be included. Extended reference of these book titles is done in the Bibliography Index.

⁵ This category of Literature consists mainly of popular newspaper articles usually appearing on front pages in the beginning of each school year. They are more public-oriented and they are thought as a "commercial trick" to increase paper circulation. Nevertheless, no matter how trustworthy the numbers and percentages they mention are, they depict real facts. In this category, however, falls a quite significant article by Psacharopoulos and Papakonstantinou(2005) which, in our opinion, served as a model for later similar discussions.

⁶ Among them Valsamopoulos(1998 and 2000) should be mentioned.

⁷ It is about three articles by Pappas(199), Tountas(1997) and Saitis (2000).

PART TWO

1. FINANCIAL MANAGEMENT IN EDUCATION :A Theoretical Approach

The Financial Management in Education has long been a separate research subject in countries where parents or social partners undertake a part of Education expenditure. Thus, a great deal of Literature has been produced worldwide, attempting to cover all aspects of the Financial Management in Education. In this paper only a brief reference to this Literature is made aiming at giving the reader a simple outline of what is referred to as Financial Management in Education internationally.

According to Levacic (1994, 8 - 10), Financial Management in Education includes two functional areas:

- management accounting
- management control

Management accounting provides information and systems for planning and controlling the organization's activities, while management control serves the needs of users outside the organization (ie fulfill legal requirements for annual audits, etc.)

As a result, school managers:

- a) need to be highly aware of the implications of educational audit and their role in it
- b) set the institution's broad policy framework and aims, link them to detailed operational goals and control the activities of the organization (to which financial management is a key part)
- c) are engaged in real resource management (such as hiring staff, timetabling and allocating capitation money)
- d) determine what real resources they acquire and how they deploy and develop them

Financial and real resource management within an educational institution involves a number of distinct stages which form a coherent and interrelated cycle of activities , called "*the Financial Management Cycle*". These activities include:

- acquisition of resources
- allocation of resources (constraints and decisions)
- implementation (that is, putting the budget into operation)
- evaluation

Levacic (1994, 8-10) goes further distinguishing between the *rational model* and the *political model* of managing school finance.

The rational model is described as more bureaucratic. Goals (or; aims) are the main point of resource allocation decisions and explicit means and activities should be taken into consideration in order to attain them. Carefully monitored and /or modifiable implementation is needed to meet the specific goals. Evaluation is a key element to ascertain how closely objectives are achieved and whether actions should be taken to improve performance. Furthermore, evaluation is used as feedback. It is characteristic that in this type of financial management there is detailed hierarchical control of subordinates. Consequently, this model fails to motivate individuals lower down the hierarchy.

On the contrary, the political (or subjective) model encourages interactions between interest groups and the organization, which are the main points for resource allocation

and budget decisions. In this model, decentralized management is important. Budgets are negotiated between budget givers and budget holders.

Financial Management in Education in Greece tends to be more rational, as the whole State administrative system is centralized and bureaucratic. This latter characteristic has always been a concern for educationalists in the years after 1980⁸.

2. STATE SCHOOL FUNDING IN GREECE: The Role of the School Committee.

The general resource allocation for State Schools is centralized. This applies to both financial and human resources. This centralization of resources refers to MiNERA along with its major decentralized services, the Educational Directorates (EDs). MiNERA receives almost 3.5% of the National Budget (or: Public Investment Budget) .

Funding for the construction of new school buildings and/ or facilities goes directly to the Municipality, which is also responsible for school completion and maintenance. A state-run company, known as School Building Organization, is contracted to build the new school.

Apart from the centralized allocated resources, every school receives a limited capitation allowance by the Local Authorities. The amount of money given to each school is estimated on the number of students calculated by a certain formula (formula- based system).⁹

In order to get this per capita allowance every school should be a member of the Local School Committee. The number of schools- members of the School Committee (SC) depends on the needs of each school and the total number of students in their catchment area. For example, city schools with large numbers of students form a one –per- one School Committee, while two or more schools in semi-urban or rural areas cluster together in order to form a School Committee.

The School Committee constitutes a joint organization with the participation of Municipal Council members, the School Head(s), a Parent Union representative [and a Secondary School Student representative, where appropriate]. Actually, the School Committee serves as a liaison between the delegated funding source (the LA) and the school itself.

School Committees are also responsible for the school canteens. School canteens are let to individuals (or- rarely- to catering companies) following a bidding. The school canteen rent is a source of income for the School Committee and it is also distributed to the school(s).

⁸ Relevant studies by Andreou and Papakonstantinou(1994) , Allamanis (1997) and others.

⁹ After the enrolment, the Head informs the ED. on the total students number. Then, the ED provides the LA with a report of the number of students in the whole LA area.

3.THE SCHOOL HEADS IN GREECE: The Statutory Framework.

Any State School teacher can be appointed as Head provided s/he has completed a certain number of years in the teaching practice (as a permanent State Category A teacher)¹⁰ . No previous experience or training is needed. The positions are advertised throughout the ED area (this applies to all EDs over the country) and candidature applications¹¹ are submitted. Candidatures are finally approved by the ED Committee of in-service Teachers Affairs¹² , working – in this case- as a selection panel. This panel often takes into consideration candidate interviews before they decide on particular appointments.

Heads combine two distinct roles:

Academic: to be responsible for the implementation of the Curriculum, the students' progress, the guidance to the teaching staff, etc.

Managerial: to ensure the efficient operation of the School, the effective management of the resources and expenditure, the care for the school maintenance, etc.

When someone is appointed as Headteacher, his/her teaching hours per week are reduced to a minimum 4 hours for Secondary Teachers and 6 hours for Primary Teachers. This alleviation of the teaching schedule aims to provide Heads enough time to perform their managerial duties.

¹⁰ Clarifications about the status of the Teaching Staff in a State School are provided in the Glossary section.

¹¹ Applications regard appointments in one's own school or in another school nearby, always within the ED area.

¹² Known as PYSDE or PYSPE

PART THREE

THE FINANCIAL MANAGEMENT CYCLE AND THE HEAD

Roles and Responsibilities: The Statutory Framework

1.1.Generation/ Acquisition of Resources

The most important State School resources are:

- Allowances from the Local Authorities. The ED is responsible for gathering information about the number of students in each school. Then, this information is passed over to the LA in order to generate the per capita allowances for each school. Allowances from the LAs are the major source of funding for schools and are transferred in 4 three-month installments throughout the school year.
- Allowances coming from the utilization of school property (ie building lettings, land lettings, etc)¹³.
- Funds from selling school property.
- Funds from donations, legacies, bequests, etc. This is the second major source of funding for schools.
- Funds from any legal resource(e.g. the school canteen)

Each school has a Savings / Current Bank Account. Only the Head is eligible to carry out bank transactions (that is, withdrawing or depositing money, signing cheques, etc). For everyday expenses (current expenses) the Head can use small amounts of cash.

1.2.Common School Expenses.

The generated income is used for various expenses, often termed “running or fixed costs” or “supplies and services”. These terms usually cover a multitude of headings including:

- Premises repair and maintenance costs
- Energy costs (heating, electricity, water supply bills, etc.)
- Office costs (telephone bills, stationery, apparatus and equipment, etc)
- school cleaning (cleaner/s wages and cleaning equipment)

Teacher salaries are paid centrally, that is, by the MiNERA via the EDs through a computerized accounting system, holding information about each teacher’s “profile” (years of service, type of payment, salary rises, allowances, etc.). This procedure concerns mostly Category A and B teachers. For Category C teachers there is an entirely different system of payment. For the latter, though paid also by the ED, it is the school which is responsible for preparing their payroll based on the number of hours they work.

As far as premises costs are concerned, the Head alone can decide what repairs could be carried out and by whom, up to the amount of 3000 euros. It is the responsibility of the School Committee to decide for expenditure in excess of this amount.

¹³ According to the law, in all cases of school property (buildings, land, etc.) the actual owner is not School but the LA. Thus, the Head is seen more as a bursar.

Finally, the school cleaning is also carried out at the discretion of the Head, who has the right to either contract it out or hire any person or persons s/he considers suitable for the job. Cleaners are ancillary staff and are subject to compulsory insurance with the country's Social Security System.

1.3. Miscellaneous Duties

Apart from income and expenditure, there is also a number of other administrative/ accounting-related arrangements in the school, for which the Head is also responsible:

- Income and Expenditure book-keeping
- Income tax payment (to the Tax Office)
- Social Security contributions payments for Category B and C teachers and the ancillary staff
- Accounting work regarding cleaners and Category C teachers' monthly payments (wages dockets, payrolls, etc)
- Audit: Two types of audit take place, internal and external. Internal audit is held by the Head in the school ¹⁴, while external – being more formal – is held by a State Audit Council Officer.

Roles and Attitudes.

2.1. The small-scale research profile.

- i. *AIMS*: A small- scale research was planned in order to find out how Heads feel about their Financial Management duties, how they perform and whether they are satisfied with the way the State support them to perform these duties.
- ii. *DIFFICULTIES*: The short time in which this paper should have been completed along with the scarcity of research resources resulted in a rather small number of research subjects. “Scarcity ” of research resources refers more to research subjects (ie busy time of school year made difficult to find Heads to respond to questionnaires) than to Literature or legislation available.
- iii. *RESEARCH METHOD AND INSTRUMENT*: The method of *Cluster Sampling* was implemented. One simple questionnaire was designed for Secondary School Heads.[It would have been also interesting to be able to investigate Primary School Heads, but they were difficult to find in the time available. An effort was made to design meaningful but simple, easily – answered close type questions. Only one open- ended question was used.
- iv. *THE SAMPLE*: 60 subjects in total took part in this small-scale research. This is a small size sample compared to the total population of State School Heads all over the country. The sample size itself constitutes an important constraint if generalization of research results is attempted. However, the sample can be regarded as valid, reliable and representative of the total research population,

¹⁴ When the school year is completed, the Head holds an internal (in-school) audit, mainly checking all financial actions taken throughout the school year , ie book-keeping, receipts collected for work done or labour offered, social security contributions paid, tax payments, etc.). Then, s/he prepares a detailed Annual Report to be submitted to the School Committee. Taking into account the Annual Report and the school bank account balances along with the enclosures, the School Committee approves and signs the Annual Report, which is then sent to the LA for the external audit procedure.

- as all of the subjects belong to the same job category and what matters more is their attitude(s) towards the issues under discussion¹⁵.
- v. *PILOT STUDY*: Although pilot study of the questionnaires may sound “luxury” for such short period of time, piloting took place with a number of 4 to 5 subjects per group. The pilot study aimed - mainly- at investigating whether the questions were clearly understood and quick to answer [as – very often- subjects seem reluctant to respond to questionnaires].
 - vi. *DISTRIBUTION AND RETURN*: Subjects were contacted directly (or, in a few cases, indirectly) and questionnaires were distributed hand- in- hand, so as to avoid waste of time and in order to minimize reluctance to complete (them). Data were collected in May 2006.
 - vii. *ETHICS*: Anonymity was a condition of the investigation, which was scrupulously preserved throughout the research and editing of the material. Thus, identification of individuals or institutions was made at least difficult, if not impossible. Personal or “profile” questions [regarding studies, type of school where the subject is appointed as Head, etc.] were avoided, not only for the sake of anonymity but because they were found unnecessary, as every teacher- after a certain number of years of service – is eligible to be a candidate for Headship.
 - viii. *FOCUS GROUP*: The questionnaire was distributed to Secondary School Heads and ex- Heads in five different Municipalities. In these Municipalities, there is a total of 60 Secondary Schools. The above mentioned municipalities were chosen for two main reasons: 1/ they are densely populated; consequently, there is a large number of schools (except one case), 2/ there are all possible types of Secondary Schools (Junior High Schools, Senior High Schools, Senior Technical- Vocational High Schools and Laboratory Centres)¹⁶. All Municipalities are in urban areas; they are close to the Municipality of central Athens. Anonymity was kept and Municipality names are coded. Instead of the full name, the initial letter is used. It would be desirable to have data from semi-urban or rural areas but this was found impractical at present as the students and Heads numbers in these areas are small and the cost of research particularly high.¹⁷
 - ix. *DATA ANALYSIS*: Effort has been made to use both qualitative and quantitative methods in analyzing the data collected. Tables, graphs and charts accompany responses to questions only where it was thought necessary and they are included in the Annex. Questions and answers form groups based on topic. There was no extended statistical analysis, as this is a small size sample. In cases where statistical procedures are included data are not coded (non-numerical data). The *frequency distribution* is preferable – in our case- because “it provides a basic means for ordering data, enabling the spread of the sample across the categories to be seen at a glance” (Hardman, 1994:335). Moreover, data can be presented as either a table or chart. Firstly, values or categories of one variable are presented. Secondly, a bivariate analysis is

¹⁵ Athanasiou (2000: 95 and 97-100) and Grawitz (2006: vol .II, 91). According to Athanasiou, a number of 30 to 100 subjects is sufficient in educational research(2000:99).

¹⁶ Clarifications about the typology of Secondary Schools are provided in the Glossary. Details about the Schools are provided in the Annex.

¹⁷ Students numbers fall dramatically year –by- year due to demographic problems. School environment- regarding this dimension- seems “fluctuating” and has a great impact not only on teachers losing their jobs but on the Greek society, in general.

attempted not by means of cross-tabulation techniques but in a merely qualitative way: wherever we are concerned with identifying relationships between variables we simply comment on these possible relationships without using numerical data. Finally, tables, charts, diagrams are processed in Excel.

2.2.Commentary.

a. The number of male Heads is higher than female. Female Heads –in their overwhelming majority- manage Junior High Schools. The respondents have an average 23.5 years of service as teachers and an average 16 years as Heads. In all cases, the subjects state that now they are well acquainted with the School Management.

b. Questions 1, 2 and 11 investigate their training, experience and management style as well as their allocation of managerial time:

It is obvious that none of them has ever participated in a training course on School Management in general or School Financial Management. However, they believe that what they really need is training on all aspects of School Management. This is likely to imply that they consider SFM as part of their managerial duties as Heads. They state that they have learnt SFM from their predecessors.

Data indicate various management styles. A significant number of Heads delegate some of the SFM tasks to members of the Teaching Staff. This may not show a general managerial intention to delegation but a means to alleviate the burden of everyday routine. It is characteristic that almost half of the subjects admit they do not have enough time to carry out all their routine managerial duties and all of them wish to stop teaching while they are Heads. However, this can be contradicted by the following correlation: question 4 can reveal aspects of managerial style, that is, communication and exchanging ideas with teaching staff and or parents about prioritizing the financial needs of the school. Responses to question 4 show that an important percentage of the subjects do discuss school problems with partners. It is evident that an extrovert and more collegial type of management is used in these cases.

c. Questions 3,5, 9 and 4 aim to investigate whether planning is implemented as part of the SFM cycle. Most of the Heads do not make a plan of needs and priorities before or after they ask LA s for funding; or, they do not make a plan at all. Only a few work on a plan while others are less stable and sometimes make plans, sometimes they do not. However, Heads state that they review the coverage of needs and priorities at the end of the school year. This seems somehow contradictory as reviewing refers to a set plan, which according to Heads' statement does not exist. This contradiction might imply that either they did not clearly understand question number 3 or end-of-year auditing is what they mean by reviewing. Planning in our case means not only prioritizing the school needs but estimating the cost of the work to be done. Lack of planning implies possible misuse of the allocated funds as well as confusion and lack of organizing the Head's workload properly. If we correlated answers to questions 3b (lack of planning) and 11(control of time) we could say that the first answers to Q 3b results into the answers of Q11.

These two answers combined with the lack of training (2) and the need of secretarial support(12a) explain partially the complaints about deficit funding (6 and 12d) and justify Heads' discontent with their salary(10).

Heads, on the contrary, show great care in hiring or contracting personnel for maintenance or cleaning needs. Although there is no justification of their answer, there might be implications of considering the best people available to meet the needs and to achieve safety for students and teachers.

d. Questions 10 and 11 can also be seen from a different point of view: that of the job satisfaction. It is true that teachers in Greece are underpaid - compared to their colleagues in the rest of the European Community- and this is the most common reason for their Syndicate's complaints and strikes¹⁸. Apart from the lack of planning on the Heads' behalf, there is a clearly- stated need for Headship time, especially when Heads undertake the burden of secretarial work(12a).

e. Scattered answers to the open question 12 reveal other [individual] problems Heads face while performing their duties and which obstruct the smooth operation of the school : not sufficient funding, delays in funding allocation , lack or hardships in cooperation with the School Committee or the Municipality representatives, etc.

f. A large number of Heads complain about the late in-coming of funds, which is probably due to the lack of flexibility in the School Committee's bureaucratic way of decision-making (question 12). A certain percentage of Heads state that the yearly amounts received by the school are not enough to cover fixed costs and services. They also think that other schools in the area get higher allowances. 13% answered positively to the relevant question, without justifying their answers or explaining on what grounds they made this comparison.

Heads' answers to questions 6,7,8 , although not particularly explanatory, imply a rigidity in the acquisition of the allocated funds. Answers to question 12b (bureaucracy), though, leaves space for comments on that rigidity. It may not always be because of lack of funds but –quite often- because of lack of flexibility in administration and the operation of the School Committee.

¹⁸ Comparisons concerning teachers' salaries across the European Union can be found in the Secondary Teachers' Syndicate website: www.olme.gr

PART FOUR

1. Discussion

1.1. Resource generation/ acquisition procedures and the role of the Head.

It has been a common belief that the centralized resource allocation provides a fair funding system for schools all over the country; while the decentralized minor resources management, at the LA and ED level, makes it possible for the LA to deploy resources more flexibly so as to achieve better results on their own areas.

In the case of decentralized minor [school budget] allocation, the rational model of Financial Management is followed; formula budgeting has been implemented as a more objective approach to school funding. Formula budgeting, obviously, attempts to relate resource allocations to some quantified assessment of need [defined-in our case-by the number of students in each school]. According to Simkins (1994:164) “their (ie formulas’) use seems to increase as one moves up the resource allocation hierarchy or as one moves from small organizations to large ones. The reason for this is that the use of formulae becomes more remote from the activities to be funded and hence less able to marshal the information necessary to make judgements among a wide variety of competing aims”.

On the other hand, a “collegial approach” to school funding has been promoted in Greece by the introduction of Committee structures (School Committee), as a more democratic and co- operative way in decision-making. Collegiality, in this case, is believed to help avoiding one-sided, subjective decisions as to who, when or how much to fund. It is also a belief that the School Committee serves as a facilitator between schools and the LA. But, is this true? Is this double system – rational FM model and collegial SC function- viable? Is the SC a facilitator? As Saitis (2000: 28-49) pointed out, school funding via the SC is complicated, time- consuming, costly and ineffective¹⁹ . Heads in our survey tend to agree with these views. There is a common belief among Heads, however not clearly stated in this research, that only the Head knows the actual financial situation of his/her school so s/he can make decisions. A small percentage of Heads questions the role of the LA representatives in the SC (open question 12).

Another interesting point is the procedure of resources allocation to each school. Typically, this complicated minor funding allocation system leaves no space for individual decision-making or budgetary negotiations. Senior management hierarchies and representative committee structures are respected “on the name of formula budgeting”. Thus, the Head seems to be involved in the financial process in a rather compulsory way: he is designated Secretary or Bursar of the SC but never presides over it. Typically, also, his/her conduct as the Financial Manager of the School is tightly regulated. Can he actually face external conflicts in negotiating budgets? Typically, no. But Heads usually take advantage of gaps in the Law to increase funding for their schools;²⁰ thus, some schools actually get larger amounts

¹⁹a. Complicated, as it involves so many partners (MiNERA via ED, Home Office via LAs/ Municipalities, schools, etc. b. time-consuming, as fund approval goes through many control stages, c. costly, as there is a bulk of administrative/ bureaucratic procedures, a subsequent involvement of a great number of officials, etc. d. ineffective, as it is not actually able to manage in-school cost-related activities.

²⁰ There is a gap in the Law regarding the way students numbers are estimated: numbers are based on the enrolment completed by the end of September. However, there are students who drop out after that. The decrease of students numbers is never again (ie after September) taken into consideration and the

than others with similar needs. This, of course, does not mean that Heads can make decisions or negotiate budgets. They simply get round externally imposed limitations in a micro-political way.

1.2. Deployment of resources.

The second issue of our discussion concerns the ways Financial Management takes place in State Schools with a view to leadership qualities for an efficient deployment of resources.

It is often argued that Financial Management is the job of accountants and Heads should be freed from SFM duties. However, Headship involves a lot of challenges. Heads- viewed as organizational leaders- clearly play a central role in establishing an institution's managing style and, in doing this, they must take into account a complex set of external and internal responsibilities and the pressures these responsibilities entail. Theoretically formula-based funding minimizes the external pressures. But conflicts can often exist within SC boundaries²¹ and the resource generation process is, thus, obstructed [and sometimes disrupted] and delayed.

Additionally, internal "micro-politics" of an organization, although sometimes critical, do not seem to affect SFM. The Head is responsible for in-school expenditure decisions and internal audit. So, s/he is the one to praise or to blame for the well-being of the school. S/he often discusses needs and priorities with "partners" (Deputy, teachers, parents) and exchanges ideas. Heads usually appreciate teamwork as it is a way to avoid internal conflicts. Moreover, they do not show any signs of indignation for undertaking SFM responsibilities. What seems to annoy them is the SFM workload and the absence of secretarial staff.

Heads tend to ignore the benefits of using a clear-cut plan of SFM, though. Answers to relevant questions reveal that planning is not considered important [consequently, many deployment decisions may be made at random or as "things come"] and, in cases where it is implemented, it is rudimentary and piecemeal. Demands for increasing funds might arise from lack of knowledge about planning and cost-related decisions.

Another point to be mentioned is the delegation of tasks. From this point of view, delegation cannot be seen as a leadership quality, as it mainly concerns performing bureaucratic or secretarial tasks (preparing payrolls or lists for the Social Security Service, etc.). So, it sounds impossible to talk about teaching staff participation to SFM.

Moreover, actual SFM evaluation does not exist. Assessment of how SFM worked or how resources were deployed is achieved indirectly when internal audit takes place. Under no circumstances is this an organized evaluation activity or does it provide feedback for further development.

initially estimated amount is given to the school. For example, a school reports 250 students enrolled by the end of September. During October and November 35 students drop out and, thus, the number goes down to 215 students. Nevertheless, the school still gets funds for 250 students. Some educationalists propose that allocation of funds should be revised every 3-4 months. LA s know the problem but they believe that such re-allocation procedure will be more bureaucratic and time-consuming than it is now.

²¹ Saitis(2000:43) mentions three major reasons of conflict between the Head and the SC: late funding allocation, disproportionate funding for actual needs, ineffective operation (ie member absences lead to zero decision-making), discrepancies among members, etc. along with a general resource scarcity.

1.3. Professional Development.

As already stated, previous experience or training is not necessary in order for someone to be appointed as Head. Actually, Head Appointment Regulations were introduced immediately after the dictatorship period (1967-1974) and attempts were then made to make them [these regulations] democratic, equalitarian and non-discriminative. They are still considered as such, despite the fact they—somehow—show a deficit.

In modern schools Heads are often encountered with challenges or demands they cannot carry out based only on their empirical background. In order to cover this “shortage” of the Heads managerial experience, the MiNERA issues a multitude of legislative regulations (decrees or circulars) which specify the roles and responsibilities of Heads in every step they take managing their schools²².

It is obvious that these strict designations of the Heads’ administrative profile limit any initiative they would take in terms of decision-making in the long run. But Heads state frankly that what they really need is training. It is true that in-service training is absent or in cases where it exists it is not sufficiently provided for all teachers. Headship training—even after the appointment to the Head post- is totally absent. Due to this absence [plus the fact of underpayment for their heavy duties], Heads cannot cope with the demands of the post, they feel discouraged and dissatisfied.

2. Conclusions.

Content Analysis and Research Data Analysis provided answers to all key questions set in the beginning of this paper. At the same time, discussion of the findings put forward four problematic areas of School Financial Management:

- Complicated resource acquisition procedures
- Absence of planning process and implementation
- Difficulties in Headship time allocation
- Lack of training for Headship (and Leadership, in general)

3. Suggestions for Heads’ professional development

The four problematic areas identified above need clear and immediate remedy. It may be argued that this remedy should be provided by the State not by the individuals. This is true up to a point. Certainly, the State (via the MiNERA) is responsible for the amendment of the Law, for the support of Heads or for the provision of larger funds to the schools. But all these activities need long-term planning and implementation. The vital question is : what can a Head do to convert routine into a dynamic way of Management and to achieve the best outcomes possible for his/her school?

This study has no intention to provide “gold standards” or tips for SFM; there are concise practical guides in the market to do so. It is desirable, though, to provide a conceptual breakthrough to fresh educational thinking in terms of a theoretical approach to SFM practice. The idea we push forward is that of the necessity of planning in the SFM. Planning can save time, effort and money and can lead to effective SFM.

²² Adding to all these, quite recently MiNERA issued a “job description bulletin” , which made things worse rather than improving them.

Planning in the SFM can be seen from a double point of view: That of programming short-term tasks depending on deadlines and that of a yearlong²³ planning process.

Short-term tasks depending on deadlines are usually more clerical/ accounting-like tasks, such as: the submission of Social Security Contributions lists, the payrolls, the Revenue payments, etc. Today, only a small percentage of schools “enjoy the luxury” of a secretary. In the rest of them, either the Head or a member of the Teaching Staff undertakes this task. This is “the easy part” as there are deadlines to catch and simple programming –of how or when the task is done- can provide effective management. A “rational” approach is preferred in this case: to focus on a small but realistic number of achievable goals [that is: tasks to be accomplished] that are well understood by everyone. This type of planning/programming is not affected by the reality of school life: every step is defined in the reasonably predictable and stable environment of the Social Security Service or the Inland Revenue Office. The cost of these tasks is “out of the school boundaries”, as this expenditure is covered by the EDs not by the school budget. The school serves as a “facilitator” in producing the accounting “platform” for these expenses. Consequently this is a series of tasks that can be realized by everyone [possibly outside school] and do not influence the school micro-community. This rational approach to programming the short-term tasks is logical and best to use in straightforward and practical situations, as the ones mentioned in this category.

However, the yearlong planning process deals –almost entirely- with the school itself: it seeks to meet the school’s needs whether they are maintenance needs or more academic-like needs, such as improving its library, the computers pool or the sciences lab. One would argue that part of these tasks can also be predictable and rational-wise (cleaning or maintenance costs, for example). Actually, these tasks are flexible and they build on existing strengths: cleaning and maintenance – apart from the daily, weekly or monthly routine- depending on other unpredictable factors (such as, workload after a school event or following to a damage). The same idea of unpredictability underpins other plans the Head might have made for his/her school.²⁴ Various forms of “turbulence” in the school environment are very common and action should be taken immediately. It can also be argued that this “turbulence” is also short-term and can be handled accordingly. This is partially true, due to the constantly changing inner school environment. But how the Head can cope with the unexpected if there is no provision in the budget? Improvisation is the key to such a situation. In fact, forecasting the unexpected is a long –term activity, as it implies previous budgeting arrangements. For some researchers responding to unexpected situations involves a “pragmatic approach” and presupposes a deep understanding of the importance of the evolutionary process in educational organizations.

On the other hand, forecasting a potential change requires a strong underlying sense of direction. Thus, yearlong planning becomes the most difficult and complex process

²³ One would ask “why yearlong and not longer than that?”. The answer is simple: allocation of resources takes place every school year. The money allocated changes from year to year so planning longer than one year is unlikely.

²⁴ Suppose that in the first Teaching Staff Assembly, in the beginning of the school year, it has been [proposed and] decided a total refurbishing of the Teachers’ Office. Although it seems that there are funds available and the work has been planned for early November, a sudden heavy snowfall disturbs the process as it drives the budget away from the preset objectives.

as it does not entail simple tasks at certain deadlines but it combines a set of premeditated actions with the risk of the unexpected change of plans. In other words, it depends on the Head's leadership qualities:

- a. to identify yearlong needs and objectives
- b. to work in small steps towards each of them
- c. to forecast "turbulence", that is unexpected changes [as far as this can be possible]
- d. to be "ready" to respond to these sudden or sweeping changes, whether they are opportunities for a better deployment of resources or impediments to the premeditated process [as far as this can be possible]
- e. not to be "afraid to improvise", that is to take initiatives [within the boundaries of educational Law, when this is possible] and finally
- f. to make yearlong planning an evolutionary and rewarding process for the school and him/herself.

In fact, implementing yearlong planning based on these qualities involves a good "mix" of rational and pragmatic principles and, according to Knight (1995:17) this is the "hallmark of the entrepreneur". Without minimizing the importance of a long-term plan for the school, the Head manages changes in a quick and effective way as he is already prepared for that. Although this may sound a simple procedure, it involves a *coherent philosophy and a set of values*, so that the planned route is kept in mind and, at the same time, opportunities falling within can be readily identified and included in or excluded from the initial plan.

EPILOGUE

This "philosophy" brings out – once again- the issue of Training on Management in Education. None of the above suggestions can be implemented as long as the absence of Management and Leadership principles is predominant. No matter how hard Heads try to be effective in performing their managerial and leading duties, this will remain unfeasible. The reason is that they lack the proper theoretical background.

From our point of view, this training ought not to be a short crash course including tips on how to manage administrative routine- as teachers, Heads and their syndicates claim- but it should be a profound, let's say probing, approach on the Theory of Management and Leadership. The proposed Planning Process for Effective School Financial Management requires solid theoretical foundations. The Department of Education (the MiNERA) should reconsider the benefits of "Education for Educationalists" and implement *lifelong operational planning* itself.

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ANNEX

TABLE1 The Case Schools NUMBER OF SCHOOLS

No	MUNICIPALITY NAME	JUNIOR HIGH SCHOOLS	SENIOR HIGH SCHOOLS	SENIOR TECH-VOC HIGH SCHOOLS	LAB CENTRES	TOTAL PER MUNICIPALITY
1	A	13	6	4*	2	25
2	L	1	1	-	-	2
3	M	4	1	-	-	5
4	N.I.	8	7	2*	1	18
5	N.H.	6	4	-	-	10
SUB - TOTALS		32	19	6	3	60

*The existence of Senior Technical - Vocational High Schools in the first and fourth Municipality is justified by the fact that these (Municipalities) are industrial/commercial areas.

FREQUENCY ANALYSIS

A. PLANNING

TABLE 2:Question 3

VALUE	NUMBER	PERCENTAGE
YES	13	22
NO	26	43
SOMETIMES	17	28
ZERO ANSWER	4	7

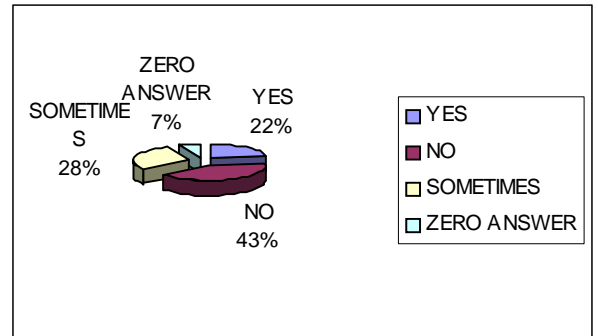


TABLE 3 Question 5

VALUE	NUMBER	PERCENTAGE
make choices	52	87
anyone available	0	0
zero answer	8	13
TOTAL	60	100

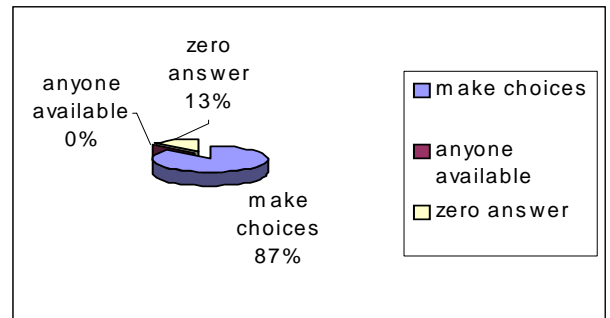
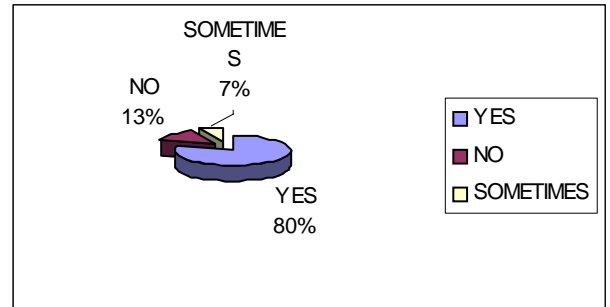


TABLE 4 Question 9

VALUE	NUMBER	PERCENTAGE
YES	48	80
NO	8	13
SOMETIMES	4	7
TOTAL	60	100



B COMMUNICATING AND DISCUSSING PRIORITIES

TABLE 5 Question 4a

VALUE	NUMBER	PERCENTAGE
Deputy Head	36	37
Teachers	20	21
Parents	28	29
Zero Answer	12	13

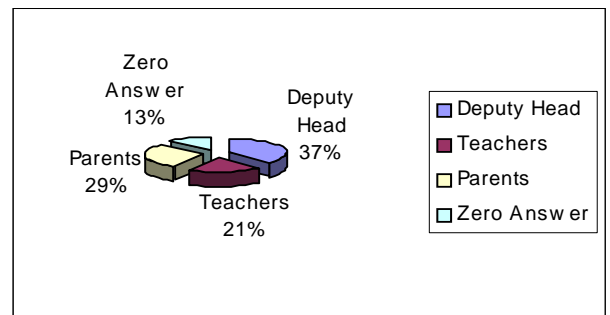


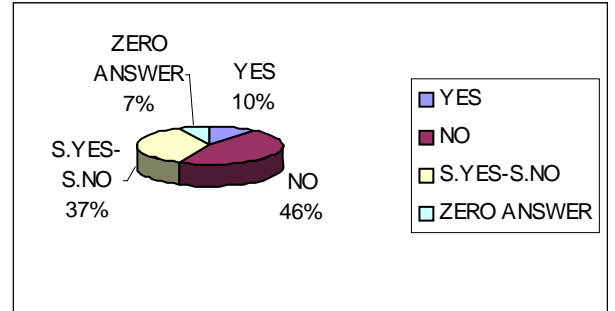
TABLE 6 Question 4b multiple answering

VALUE	NUMBER	PERCENTAGE
Deputy only	12	20
Teachers-Parents	8	13,33
Deputy-Parents	16	26,66
Teachers-Parents	8	13,33
Deputy-Teachers-Parents	8	13,33
Parents only	8	13,33
Zero Answer	12	20

C COMPARISON WITH OTHER SCHOOLS(external environment)

TABLE 7 Question 6

VALUE	NUMBER	PERCENTAGE
YES	6	10
NO	28	46
S.YES-S.NO	22	37
ZERO ANSWER	4	7
TOTAL	60	100



D TRAINING, EXPERIENCE NAD MANAGEMENT STYLE

TABLE 8 Question 1 (multiple answering)

VALUE	NUMBER	PERCENTAGE
well-trained	30	20
not trained at all	0	0
tips from ex- Heads	39	27
perform alone	9	6
delegate	36	24
not enough time	34	23

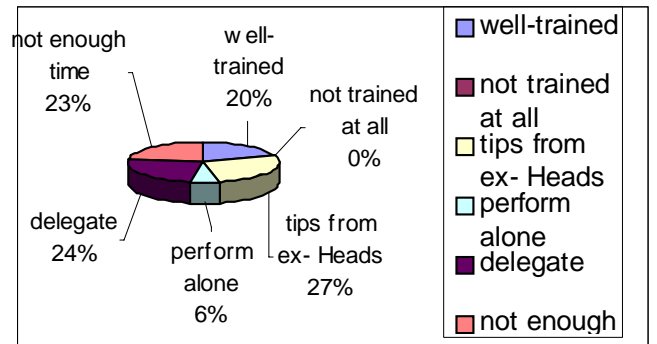


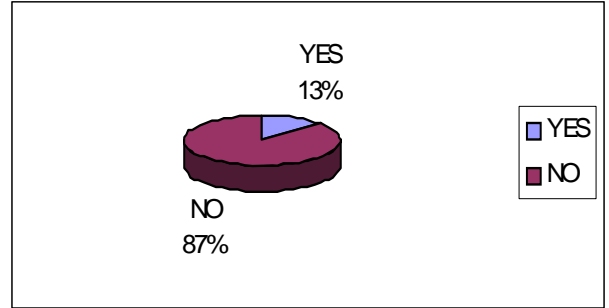
TABLE 9 Question 2

VALUE	NUMBER	PERCENTAGE
no previous training	0	0
training only in SFM	8	13,33
training in Management in Education	60	100

E. TIME CONTROL

TABLE 10 Question 11

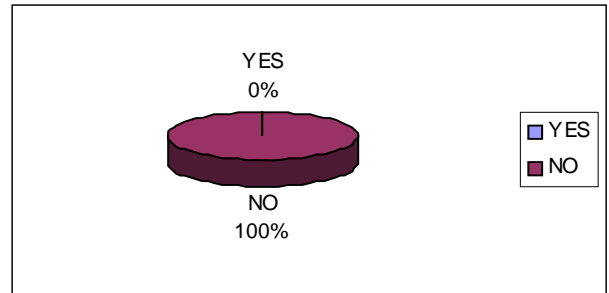
VALUE	NUMBER	PERCENTAGE
YES	8	13
NO	52	87
TOTAL	60	100



F. JOB SATISFACTION: aspect:earnings

TABLE 10 Question 10

VALUE	NUMBER	PERCENTAGE
YES	0	0
NO	60	100
TOTAL	60	100



G. OPEN-ENDED Question 12

TABLE 12A

VALUE	NUMBER	PERCENTAGE
ANSWERED	38	63
NOT ANSWERED	22	37
TOTAL	60	100

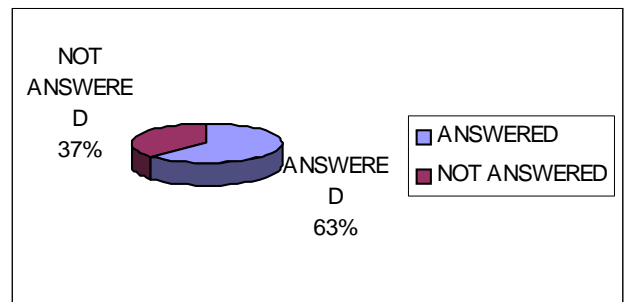


TABLE 12b (in terms of priority)
multiple answering

<i>VALUE</i>	<i>NUMBER</i>	<i>PERCENTAGE</i>
Lack of Secretary	18	30
Not sufficient funding	12	20
Cooperation with the SC	3	5
and Municipality reps	3	5
Fund acquisition delays	3	5

- b. the Teaching Staff
- c. the Parents
5. When you wish to contract or hire (non-teaching) staff do you
- a. make choices
- b. take anyone available
6. Do you consider the annual funding from the LA sufficient for your school needs
- a. YES
- b. NO
- c. SOMETIMES YES, SOMETIMES NO
7. Do you receive the annual funding from the LA early enough to cover the school needs
- a. YES
- b. NO
- c. SOMETIMES YES, SOMETIMES NO
8. Compared with other schools [with similar funding needs] in the LA area do you think you receive enough money for your school
- a. YES
- b. NO
9. At the end of each school year, do you review whether and / or how needs and priorities of your school have been covered
- a. YES
- b. NO
- c. SOMETIMES YES, SOMETIMES NO
10. Do you believe your earnings as a Head are sufficient
- a. YES
- b. NO
11. Do you think you should go on teaching while being a Head
- a. YES
- b. NO
12. Please, mention the two most important problems you face in managing the financial affairs of your school
- a. _____
- b. _____

THANK YOU FOR YOUR COOPERATION

TABLE A
THE GREEK EDUCATIONAL SYSTEM
ADMINISTRATIVE STRUCTURE

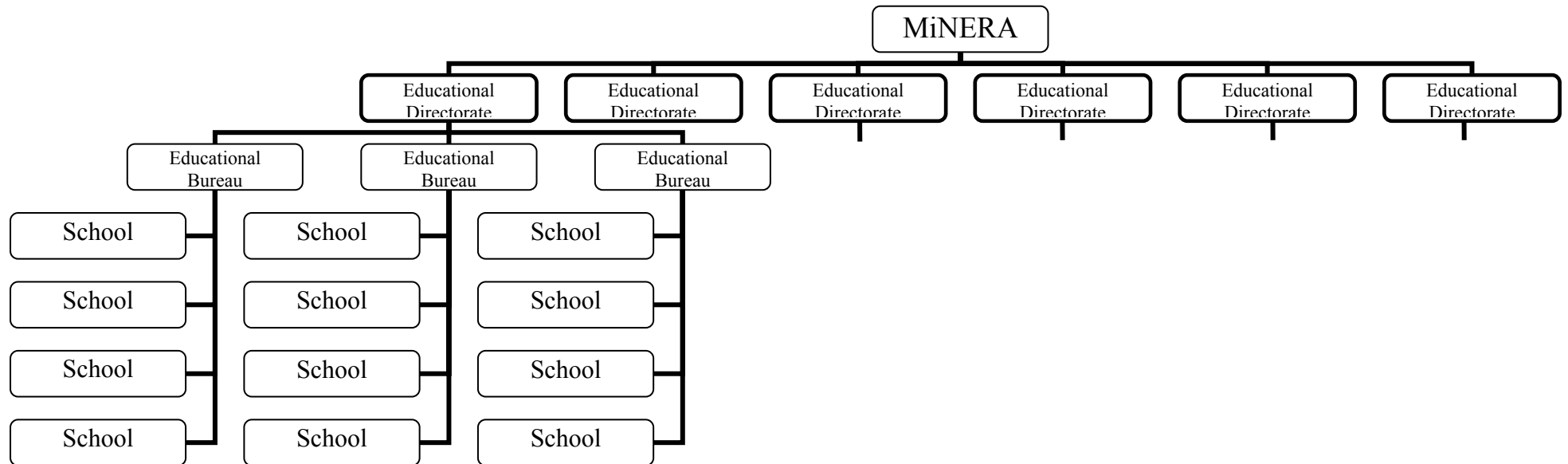
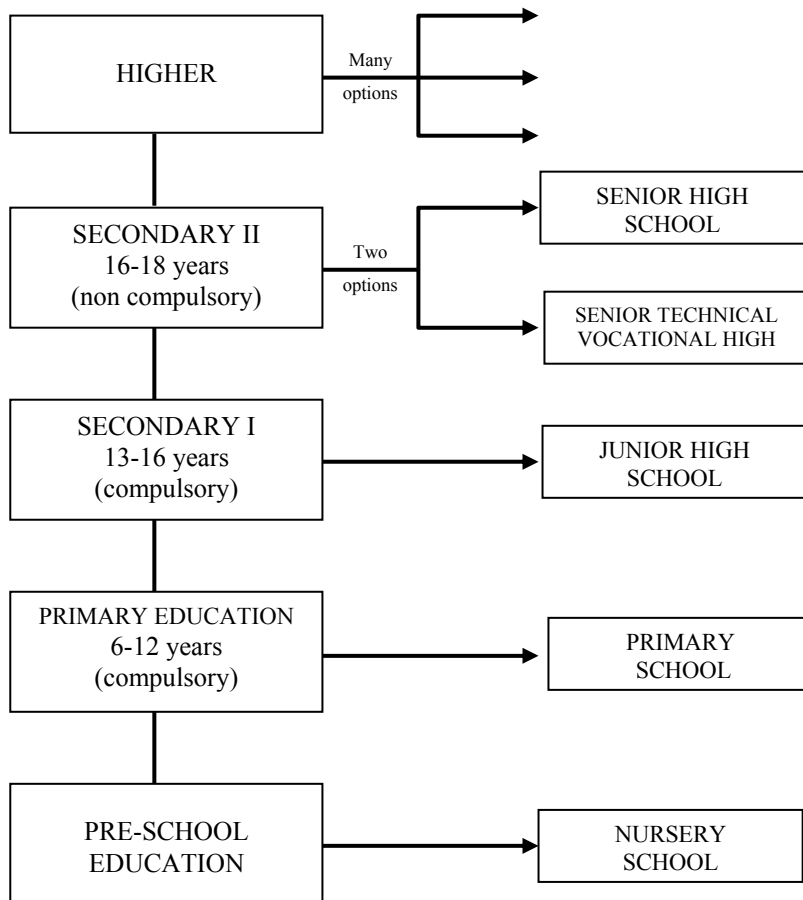


TABLE B
TYPOLGY OF PRIMARY & SECONDARY SCHOOLS



ABBREVIATIONS

ED:	Educational Directorate
FM:	Financial Management
LA:	Local Authority
MiNERA:	Ministry of National Education and Religious Affairs (that is: Department of Education)
NGP:	National Gross Product
SC:	School Committee
SFM:	School Financial Management

GLOSSARY

Catchment area:	
Category A teachers:	Permanent full-time personnel
Category B teachers:	Temporary full-time fixed-term personnel. They are paid a fixed month salary
Category C teachers:	Temporary part-time, fixed-term personnel. Their salary is estimated on the hours they work per week.
Educational Directorate:	Decentralized Educational Department of MiNERA
Junior High School:	Type of School (compulsory Education) for 13-15 year-old students
Primary School:	Type of School (compulsory Education) for 6-12 year-old students
Secondary High School:	Either a junior High School or a Senior High (or Tech-Voc.) School.
Senior High School:	School for 16-18 year-old students (non-compulsory Education)
Senior Technical Vocational School:	School for 16-18 year-old students (non-compulsory Education)
State Teachers:	At present they are appointed after succeeding in a nation – wide exam conducted by the National Exam Board, called ASEP. In the past, there was a year list from which a certain number [defined by the MiNERA] of teachers, was appointed every year. In all cases of appointment teachers are 4-year University graduates. As the introduction of the nation-wide exam is quite recent, remnants of the previous system still exist.

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***Inclusion and Special Needs Education:
Managing Change or just Marketing the Educational Reform?***

Commonwealth Council for Educational Administration and Management

CCEAM Conference
“Recreating Linkages between Theory and Praxis in Educational Leadership”
Lefkosia (Nicosia) , Cyprus
12 –17 October, 2006

INTRODUCTION

Special Needs Education (SNE) has been significantly developed in Greece for the last 25 years. The statutory framework, as it has been reformed by the L2817/2000, has been updated and brought into line with the European policy against Discrimination. Institutions are now required to be proactive in encouraging students and their parents to disclose a disability and to provide education opportunities for disabled students and/or students with learning difficulties.

So far, various types of SNE have been developed: Special Schools, Mainstream Schools with provisions and arrangements for children with Special Needs (integration classes), Peripatetic Teachers, Special Needs Occupational and Educational Laboratories (known as EEEEEK in Greek), Local Educational Authority SNE Diagnosis, Assessment and Support Centres (known as KΔAY in Greek), etc.

Moreover, action has been taken to organize and/ or improve Teacher Training Programmes to enable teachers understand the issues in Inclusive and Special Needs Education regarding implementation of new educational policies and practices.

It is true, though, that more emphasis has been put on Primary Education, within the boundaries of which a remarkable number of educational structures has been developed.

Nevertheless, a great deal of SNE problems remains unsolved. The new trend, under which the most recent L2817/2000 has faced SNE in Greece, made clear that there is a noticeable structural “gap” in terms of Organization and Management in Special Needs Education. It has been expected, however, that newer legislative regulations would help to bridge this gap. The newly elected and appointed Conservative Government- wishing to reform Education- "tackled" the SNE issue by proposing a new Bill.

1. THE PHILOSOPHY

A number of implications underpin this study:

- Knowledge is only of significance if it is based on observations of external reality.
- Science proceeds through a process of hypothesizing fundamental principles and then deducting what kind of observations will demonstrate the truth or falsity of these hypotheses.
- The observer is independent of what is being observed
- The choice of what to study and how to study it can be determined by objective criteria rather than human beliefs and interests.

2. HYPOTHESIS AND PROPOSITIONS

The structural gap mentioned above consists of many SNE sections which have not been developed yet or have been underdeveloped. Research can provide feedback for planning educational policies as well as strategies for practices and set new educational structures accordingly. In other words, a theoretical background is necessary to introduce reform. Reform is worded in legislative regulations. In bureaucratic educational systems legislation is of prime importance regarding the implementation of the proposed changes.

Discussion in this paper seeks to investigate the SNE “areas” that have not been properly surveyed and organized in the present situation so as to provide an organizational framework on which new legislative regulations can be built.

3. OBJECTIVES

Identifying specific objectives will help choose the research method and add to the theoretical approach of the issue, the analysis of data and the reach of conclusions. So, the prime objectives of this study are the following:

- To consider SNE as an organizational system within the framework of the Systemic Theory without intervening with purely medical, psycho-pedagogical or educational matters.
- To stress the idea that SNE – as an organizational system- should be seen as part of the National Educational System , being worth of special attention and specific Educational Policy
- To offer insight on the general need of profound and holistic theoretical analysis on each and every educational issue prior to any legal arrangement.
- And, finally, to question whether the newly proposed bill is able to introduce change and reform to the existing SNE status.

2. THE METHODOLOGY

We have concentrated on the retrieval of information from legal documents, government publications, books, etc., as they are the most productive primary sources for a small –scale project. At this point we agree with Baker and Carty (1994: 225) saying that “when time is limited, an approach to a few carefully chosen sources will probably produce more than enough references, especially as, once traced, all the material selected as potentially useful has to be read”.

Consequently, the methodology of *Documentary Analysis* or *Content Analysis* has been implemented. Content Analysis has been defined in various ways. Krippendorff's definition (1980: 21) that "Content Analysis is a research technique for making replicable and valid inferences from data to their context" seems more complete and – though perhaps over-inclusive in not making clear that various kinds of data are dealt with - does have the virtue of stressing the relationship between *content* and *context*. According to Robson's observation (1994: 237) "this context includes the purpose of the document as well as institutional, social and cultural aspects; it also emphasizes that reliability and validity are central concerns in Content Analysis.

3. LIMITATIONS

For more than twenty years there has been increasing emphasis on the need for talented and gifted children to be educated under special arrangements and to be treated as an individual category of Children with Special Educational Needs. In Greece, the Pedagogical Institute has done a marvellous job on "Talented Children" by publicizing a concise Guide to their Education. In this study, however, this category of special children has been deliberately excluded, as it is believed that their needs are less crucial compared to those of children with disabilities and that talented children – in any case – will be able to manage and adapt better in later life than other special children.

4. LITERATURE REVIEW

Although a great deal of books, studies, papers have been written and research has been conducted on medical, psycho-pedagogical and purely educational SNE issues in Greece and abroad, it seems that only a small number of researchers have tackled the issue of Organization and Management in SNE.

Literature available usually contains government reports or government-related publications on the number of Special Schools and the educational policies and practices in SNE. All these documents show a more or less bureaucratic approach on the way SNE is formulated within the broader educational system and tend to "boast" about the state concern on the matter.

Legislative documents, on the other hand, outline the policies and practices on SNE in a more "austere" and rigid way. From these two types of documentation only the first provides some sort of critical analysis, however restricted, so as not to transgress the "bounds" set by the government policy.

In this paper both Greek and English government documents have been used. The first have been the core elements of the discussion while the latter helped enormously in translating properly the SNE terms and in providing a platform of comparison to what happens in another European Union member state.

Greek documents included:

- a. the Report on "Mapping the SNE schools", a survey conducted by the Pedagogical Institute in 2004
- b. the Guide for Children with Excellent Skills and Talents
- c. the SNE leaflet of the Ministry of Education
- d. the SNE statutory framework 1981-2006, that is a collection of laws, degrees and circulars issued during this period, the majority of which are still totally or partially valid

The English documentation which helped the author to the translation of terms includes mainly publications of the Department of Education and Skills, U.K., and included:

- a. the SEN Document List
- b. a Guide to the Law for School Governors
- c. the brief on the Disability Rights Commission
- d. the Discrimination Act
- e. the SEN policy

Moreover, the draft of the new Greek Bill on SNE prepared by the Ministry of Education provided the opportunity for discussion and comments in this paper.

References on organizational theory and educational reform can be found in various (international and Greek) books and articles cited in each case accordingly.

A book, published lately in Greek, by C. Syriopoulou, titled “Education in post-modern era: the case of Special Education” seems to be a serious attempt to see SNE as a separate organizational system within the Greek educational system and the society. In this book, reference is made to all details that compose what is called Inclusion and Special Needs Education, with emphasis on the SNE policies implemented throughout the 20th century. It is shown that every step the State took in the past concerning SNE was closely interwoven with the psychiatric and medical development while lately special children are seen as part of the “student force” and they demand a form of education tailored in their own needs. The book is obviously based on the writer’s doctoral dissertation titled “The late appearance of Special Education in Greece 1821-1995, with reference to the role of Headteacher in Special Schools in Greece”.

Although SNE has been a distinct part of Teacher undergraduate studies in Greece for more than 12 years, the Management of Special Schools has just appeared “timidly” in Teacher Training Curricula, especially in Primary Teacher Training Post-graduate Programmes. Very few case studies on Management of Special Schools have appeared - mostly unpublished – mainly in the form of Master’s dissertations. In their great majority, they are written by in-service Primary Teachers studying in post-graduate Programmes. In these projects prominent is the worry about knowing how to apply Theory in every day special school routine.

5. THE CHANGING CONTEXT OF THE SNE POLICY IN GREECE

In the 70’s, the Greek State’s concern about children with special needs was expressed by the establishment of 40 Special Schools for “mentally retarded and abnormal children”. Only some of these schools really worked. After that, measures about Special Education were fragmentary and there was no continuous provision for SNE.

In the beginning of the 80’s the statutory framework for SNE was set by the introduction of the L1143/1981. Diversity from ordinary educational needs was accepted as part of social differences. Many of the provisions in present legislation can be traced back to the 1981 law. Greece tried to update the educational policies for Special Children at the same time as other European countries. In the United Kingdom, the Education Act of 1981 made provisions and arrangements for Special Children based mainly on the findings of the Government Committee of Enquiry under Baroness Warnock (which reported in 1978).

Legal provisions and policies updating were deeply influenced by the European Community Directives about SNE, as member- states have been mainly financed by

the European Commission. From 1981 until 2002 a number of laws have been introduced and Greece “co operated- through a number of programmes, such as ARION, HELIOS I AND II- with other member states in order to exchange information and to form a common education policy” (Syriopoulou, 2003: 156). European funding of SNE started in 1994 and aims at upgrading the educational infrastructure, teacher training, sustaining the LEA Diagnosis, Assessment and Support Centres and supporting all children defined as Special (DfE leaflet about SNE).

Moreover, modern “trends” in educational policy- making, such as diversity, multiculturalism, new educational technology, etc., have influenced the SNE development in Greece. Thus, individual differences and the right for equal opportunities in Education are respected; in addition, medical and technological advances are taken into consideration in the assessment of special children. All these have resulted in building parents and carers’ confidence in the state provisions for SNE , helping them to accept their children’s diversity, setting them free from prejudices of the past and , finally, guiding them to help their children “stand on their own feet” and be more independent.

However, there is still a long way to go for SNE in Greece in terms of organization and infrastructure. Legislation so far has dealt with National SNE Curricula modification, Special Teachers’ appointments and categorization of Special Needs; less attention has been paid to Secondary Special Education or to the Vocational Education and Training of Special Children.

5. THE NOTION OF THE ORGANIZATIONAL FRAMEWORK:

a. The Bureaucratic and the Systemic approach.

Kantz (1964: 34) for the first time characterized the Educational System as a “complex social organization”. He specified it as “complex” because it includes many different persons who interact in their performance of many different functions and “social” because the participants are interdependent and “their actions are socially promulgated and enforced”(ibidem :428).

Going further than that Harling (1994: 20) claims that the Educational System as a whole is an “organization” that it possesses constituent “organizations” at various levels. The distinctive characteristic of an organization is that it has been formally established for the explicit purpose of achieving certain goals. Every organization has a formally instituted pattern of authority and an official body of rules and procedures which are intended to aid the achievement of those goals. However, alongside this formal aspect of the organization are networks of informal relationships and unofficial norms which arise from the interaction of individuals and groups working within the formal structure (formal and informal groups of pressure, see also, Michopoulos, 1998: 137-138).

In the case of the Educational System, how do all these formal and informal networks work together, how are they structured and how do they interact? Under what perspective is the administration and the management of the organization carried out?

The most widely recognized framework for understanding formal administration and supervisory structures is the *bureaucratic model* first articulated methodically by Max Weber (Harling, 1994: 21 and Michopoulos, 1998:39-48). Weber (stated in Harling), believes that “the decisive reason for the advance of bureaucratic

organization has always been its purely technical superiority over other forms of organization”.

A lot of studies have been done on how Weber’s model of bureaucracy is applied in schools and educational systems. In Greece the most popular is that of Andreou and Papakonstantinou (1994), incorporating a great number of practices proving the bureaucratic perspective of the Greek Educational System. According to Harling, there several distinct features of the Weberian model that ascertain the extent of bureaucracy in education and its effect on educational administration, leadership, decision-making and organization, such as the distribution of organizational tasks, the hierarchical authority structure, the formally established system of rules and regulations governing official decisions and actions, etc.

In 1957, Getzels and Guba introduced the notion of the *social systems model*, which was later extended and modified by Meyer (1978) and Hoy and Miskel (1996). In this new perspective, modern organizational theory is rooted in the social sciences which emphasize the importance of the individuals and their interaction within a certain social system (human relationships) and/ or other social systems (Michopoulos, 1998: 74). As far as the educational system is concerned, its constituent organizations individually and collectively respond to stimuli from their social environment and they also affect the environment with their “output”. Since the educational system is a “human organization”, its organization and management should therefore be concerned with two different dimensions: the “nomothetic”(legislative) and the “idiographic”(personal), as Harling calls them; more specifically, leaders and decision-makers should take care of:

- a. the survival and maintenance of the school system
- b. the appropriateness of the educational goals,
- c. the welfare and the development of staff, and finally
- d. the intellectual, social and emotional development of children/ students who use and benefit from the educational provisions.

It is most likely, however, that in every educational system there is a “mixture” of both perspectives with a good deal of inferences in individual aspects of the educational process. Modern Educational Systems tend to be more open nowadays although they do not manage to “mature” and free themselves and their individuals from the dominance of bureaucracy.

b. Assessment and Evaluation of Organizational Performance.

According to the bureaucratic/rational perspective organizations are purposeful goal-seeking entities which use techniques to enhance their ability to survive and prosper. Therefore, evaluation is undertaken to ascertain how closely objectives are achieved, why discrepancies arise and what action can be taken to improve performance. Thus, the results of evaluation serve as feedback for further corrective actions.

On the other hand, the political/subjective perspective share the view that concept of an organization’s goals is meaningless. If objectives are pursued at all they are those of particular interest groups not of the organization as a whole. It is obvious that in this approach the focus is on the meanings individuals attach to organizational activities.

Education practitioners, though, seem to amalgamate elements from both perspectives as well as from other newer approaches (collegial or ambiguity

perspectives, for example) according to the needs of their institutions or to the relativity of circumstances.

In any case, however, it is clear that any evaluation and assessment form introduced for the first time may be rejected by institutions, social partners, syndicates, etc. because it often clashes with the up- to- that date culture, the interests of groups or individuals or with the decision- making itself.

6. CHANGE AND REFORM

All types of organizations today are obliged to make changes in their way and form of function so as to meet the leading changes in their external environments. Changes in various aspects of socio-political life push organizations to adopt various approaches in accomplishing their goals or to implement innovations so as to achieve viability.

There is a number of factors that affect organizations and lead them to introduce changes. Michopoulos (1998: 109-113) suggests, among others, the social dislike for the outcomes of the organization, discrepancies among organizational sub-groups, deficit function, lack of goal achievement, etc.

Hoyle (1994: 126) argues that “there is a pathos inherent in all organizations which arises from the chronic discrepancy between proclaimed organizational goals and their achievements”, while Barr Greenfield believes that there is excessive concern for change with the structures and progresses within an organization rather than with people working in it (1994: 81-93).

Whatever the factors, agents, purposes or aims of the change are it is certain that they involve new dynamics and may be seen in three levels, when they regard educational change and reform:

- a. cultural changes, freeing people in the organization from past practices and attitudes
- b. structural changes, required for the implementation of the reform agenda
- c. skill changes, providing a broader range of skill sets, necessary to manage change effectively.

From this point of view, change and reform focus on the organization as an entity including both people and structures in a balanced proportion and providing a theoretical basis on which to plan, to prepare and to implement change.

7. THE SNE ORGANIZATIONAL FRAMEWORK AND THE MANAGEMENT OF CHANGE.

Discussion so far has contributed to formulating a background on which change within an organizational system can be approached. It also put forward a certain set of principles on which the SNE Management and Change should be considered.

In short, we argue that SNE is an integral system within the broader Educational System, interacting with it as well as with the prevailing social system. It affects both while, in turn, it is affected by them. Consequently, as (both) the prevailing social system and the broader educational system change, SNE should also change, either by reforming, remodelling or improving existing structures or by introducing new ones.

Thus, change and its management in the case of SNE in Greece should be consider the following areas:

I. Management of SNE as a whole.

SNE is viewed as an interactive sub-educational system. In this capacity SNE concentrates all the features of an organizational system and doing so “demands” further development: expansion or completion of its sections, a sound and profound infrastructure, appropriate staffing, research and professionalism.

Such development presupposes a *cultural* change (that is: change in attitudes towards discrimination, racism, special needs). It means the acquisition of a certain degree of flexibility in the State-directed and – administered services and staff so as to be freed from old-fashioned micro-political tactics and traditional notions of their roles and adopt a more flexible team-working.

However, changes of this type take a long time to be implemented, thus making “brave” educational policies ineffective in the long run. Therefore, it is accepted a priori that changes will cause various reactions- sometimes stemmed from unexpected variables- and this will result in slower development.

It is self-evident that under SNE development lie implications of a broader reform agenda embedding administration improvement, bigger financial contribution and professionalism on behalf of not only the teaching, medical or psycho-pedagogical staff but the state services and the whole society, as well.

II. Management of Special Schools

“Special Schools address students with divert educational needs compared to conventional school students” (Syriopoulou, 2003: 61). Each student has a particular problem and requires particular treatment. This fundamental feature automatically differentiates the function of a Special School from that of a conventional school in the idea that uniformity of operation, compliance with general regulations, standardization of textbooks and syllabi, fixed numbers of teachers per number of students, etc. become impossible. New operational principles and values are introduced: flexibility, patience, sensitivity, individual tutoring, special knowledge, new professionalism.

As a consequence, the Special School Head teacher, although still considered the “core” and “inspiration” of the school and still “loaded” with all the administrative and managerial duties of a conventional school Head, finds him/herself into a brand new leading role:

- to co ordinate various and divert teaching and therapeutic groups of staff [participating in the operation of the Special School],
- to communicate –in the best possible way- with all of them conveying the “messages” of the one part to the other without any type of “interference”
- to “smooth” down possible conflicts
- to care for the peace and quietness of the school [which is tense and turbulent a priori]
- to facilitate the communication and interaction among staff, parents, social partners(if there are any) and students.

These differentiated managerial duties demand a complex set of values, studies and experience for the Special School Headteacher. However, it is obvious that such a person cannot be an “Iron Man”. Undoubtedly, s/he should have a higher degree of educational background as well as special leading and communicating qualities to enable him/her to carry out his/her multiple duties. But s/he cannot fulfill all his/her

tasks at his/her good will. This is where the State Concern should be present. If care has been taken in terms of a complete organizational framework, consequently support will be likely to be provided by the organization itself so as to alleviate additional pressures often placed on the Head. In other words, a remodelled, more flexible organizational operation of the Special School will supply a platform for both the Head, the teachers and the students to work together.

III. Management of Special Needs in a Mainstream School.

It involves special educational arrangements for a child to be taught in an ordinary class or in a *specialty resourced provision unit* attached to a mainstream school. It is often argued that this type of schooling refers to children with minor learning difficulties, such as dyslexia, dyscalculia, etc but it could not be possible for children with severe physical disabilities.

In this type of schools one or more Special Teachers should be appointed not only to carry out the teaching tasks but to serve as SNE Coordinators. For economy purpose though, the Head or the Deputy usually take on this role.

There are advantages and shortcomings in this type of Special Education: a special child still remains part of the school micro-society and his/her integration is encouraged and facilitated but –at the same time- there is a risk of discrimination (or mockery or –sometimes- bullying) from other, “ordinary”, children. Also, sustaining integration units in a mainstream school means extra costs, as individual needs require individual education and care at multiple levels of provision.

Managing Mainstream Schools with Integration Units or Special Provision Resources seems the hardest Headship task. Apart from all the leading capacities mentioned in the previous case [of “purely” Special Schools], the Head faces the ordinary children’s discrimination challenges and is obliged to continuously watch the delicate balance keeping among students. The whole teaching team should also be prepared to do so and adapt their teaching methods accordingly, avoiding any discrimination against learning diversities.

IV. New Teacher Professionalism

It should be acknowledged that in both school cases discussed above (ie Special Schools and Mainstream Schools with SNE provision), the Head and the rest of the teaching team have already been aware of the particularity of their Special Students’ Needs and are well prepared to work towards improving their attainment. Hence, attention should be drawn to the Teacher Training process. State intervention is necessary for an organized, periodical and continuous training process but this is not sufficient. Teachers, on their behalf, should see professional development as an ongoing part of their everyday activities rather than a separate activity which adds to their workload. Change of teachers’ attitudes towards training is one of the cultural changes needed for the development of SNE and the Educational System as a whole.

V. Organizing, Extending and Remodelling SNE sections and services.

Managing SNE change in Greece underpins the need for improvement of educational and socially based structures. There are four main areas of interest in which progress should be made:

a. Secondary Special Education.

According to the Pedagogical Institute Research (2004: 201), only the 5,7% of the existing Special Schools belong to the Secondary Education. It seems as every attempt to educate special children stops at the age of +/- 14. Although, since the beginning of the 90's some writers (for example, Delassoudas, 1994) have pointed out the need for the continuation of Special Education after that "threshold" age, only a few steps have been made so far. It is widely thought that this lack of Secondary Education structure is also connected with the lack of jobs for special people in the market. Moreover, it partially justifies parental attitudes towards SNE, as it will be seen further below.

Certainly, there is a limited number of Secondary Special Schools or an alternative of Occupational and Educational Laboratories for Special Students but they are all gathered in urban areas.

Special Education, as a teaching subject, is also missing from Secondary Teacher Training Curricula and there is not [so far] appropriate provision for such Secondary Education Studies at undergraduate or postgraduate level.

b. Cooperation between SNE Diagnostic and Assessment Centres (DACs) and Schools

Diagnostic and Assessment Centres, as an institution, still have a "very short life". They were firstly introduced in the beginning of the millennium. Their main responsibility is to issue a SNE statement – usually on an annual basis- identifying the child's special educational needs and outlining the provision to meet these needs either in a mainstream or a special school. There is a strong belief among – especially Secondary mainstream - teachers that SNE/DACs, since the SNE statement is issued, take no responsibility any longer. Teachers expect the DACs personnel to communicate with them with regard to students' attainment and to invigilate children's progress. Mainstream- school teachers often ask for specialized help, which DACs personnel can offer, but they are unsuccessful. Provided that there is an inherent lack of Special Training for Secondary Teachers, teachers are left alone to find ways to educate a special child in an ordinary class.

c. Evaluation of SNE organization and infrastructure.

No matter from what point of view (rational or political) the issue of evaluation is seen, it is totally agreed that it should take place in an organization. Even though SNE policies have seen many changes so far, evaluation of SNE existing structures has not formally taken place, constituting another "gap", that of feedback and information. It would be argued that the attempt of the Pedagogical Institute to map the existing SNE infrastructure was a single example. It provided a first-hand bank of information for further research and action.

Any attempt of evaluation should be carefully researched and planned. Criteria and performance indicators should be set and piloted in advance so as to provide information needed and be of any use for further development. Prior evaluation results should be taken into account (and used as feedback) for decision-making and the introduction of new legislation.

d. Parental Consent and Cooperation.

Very often teachers in conventional Primary School classes note some children's learning problems, even though they are not qualified SNE teachers. In many cases they approach parents and offer guidance so as they (the parents) seek professional help and diagnosis. Parents are - still in our days- reluctant to accept professional advice believing that discrimination towards their child will "ruin" his/her future. Many children with learning difficulties go on ordinary schools throughout their school life merely because their parents refuse to acknowledge their children's special needs, cooperate with the educational authorities and give their consent for them to follow Special Education programmes.

In similar cases it is the State's concern and responsibility to intervene by setting appropriate regulations and structures to assess children's learning skills and abilities at an early age (pre-school and/ or early primary years). Clear expectations set out in this domain underpin a coherent organizational framework of parents' information and early- year child- assessment services. Research should be taken on to find ways to "eradicate" attitudes of discrimination both on societal and parental level.

The underlying problem here is extremely complicated and the organizational background offered by the Systemic Theory comes to shed light on: parents form part of a society that praises gifted children, that does not fully accept diversity and offers very few chances of integrating special people in the "professional" workforce. In a turbulent market where chances of finding a decent job become slimmer and slimmer, people with special needs seem less privileged. Consequently, parents are sure that acceptance of diversity automatically impedes children's professional development or – at least – narrows their wider prospects of education in an ordinary school. They often feel ashamed -or guilty- of their children and try to "hide" diversity at any cost.

Hence, the State's concern and intervention goes further than obliging parents assess their children's skills and abilities. It is necessary that SNE becomes a matter of broader Social Providence policy, which requires funds and general cultural change in order to be sustained.

8. MARKETING CHANGE AND REFORM:

The new Bill- a critical analysis

Marketing educational services has not been a practice for Greece, as the greater part of educational institutions belong (that is: financed and administered) by the State itself.

On the other hand, in societies and countries where "the notions of privatization, of greater competition and the operation of free market economics in the public sector, and of the consumer control, have pervaded government policies and legislation" (Gray, 1994: 48), privatization sees parents-or employers- as clients and students as customers and attempt is made for their needs to be satisfied.

State advertising educational changes in media came as an idea and was shortly implemented in the period 2000-2004 in order to "inform the public" about statutory changes in post- compulsory education (implementation of Technical- Vocational Senior High Schools in a two -levelled structure) or innovations in Primary Education(all-day Primary Schools).

Marketing of educational change and reform is usually a pre- election practice. During pre-election campaigns each political party engages itself in introducing reform for "the benefit of our children" stressing mainly on issues that have greater

appeal to the public (for example: the university- entry examinations system, the open education, the foreign languages and the use of IT in state schools, etc).

The new Bill on Special Needs Education came as a fulfillment of the pre-election Conservative “promises” in a very short time, thus containing a significant number of “lagunae”, legislative as well as pedagogical. The SNE Bill was publicized in mid-February 2006, but it has not been “discussed” or “critically analyzed” yet, as the Ministry of Education is busy with the social turbulence the Bill on Higher Education has given rise to. However, it provided the opportunity for dealing with SNE from a different point of view and became the reason of this paper. It would be argued that it is unethical to comment on a simple draft (note that this is the Ministry officials’ attitude) but criticism and commentary is incumbent when a Bill draft sees the light of publicity.

The draft in discussion recapitulates –in short- all previous legislative regulations, still valid in SNE, and introduces administrative changes of minor importance, mainly Pre-school and Primary Special Education. Issues of major significance, such as Secondary Special Education (organization, management, staffing, teacher-training), parental information and guidance, cooperation among various SNE sections or institutions, etc are excluded.

The analysis of the selected constituent elements of SNE , presented in this paper, pointed out some of the missing pieces in the SNE “puzzle”. None of the “suffering” areas of interest – discussed above- has been taken into account in the new Bill. Instead, the text [writer] seems preoccupied with minor –mainly- administrative details that appear to support sectional interests. But the most striking feature of this draft is the lack of proper planning and research on SNE fundamental issues. The whole task seems rough and impromptu.

Special Needs Education, however, is a very delicate matter and the introduction of a new law presupposes consideration of a great number of variables, careful management of the available funds as well as ensuring new fund resources, and undisturbed attention to psycho-pedagogical and educational principles.

9. CONCLUSIONS

This paper is based on the idea that a sound and comprehensive Inclusion and Special Needs Education organizational framework will constitute the platform on which changes on the ISNE statutory system will take place. Reform expressed by the introduction of a new law will seek to achieve integration and completion and, thus, improvement of students' attainment.

Attention has been drawn to a theoretical approach stressing on organizational principles and processes. In turn, the theoretical approach has provided a "model" of needs analysis in SNE. The draft of a "new" SNE Bill produced by the Ministry of Education gave the opportunity to discuss change and reform. Discussion reached the conclusion that a broader reform agenda should be considered in SNE, embedding the following perspectives:

- Managing ISNE as a whole, that is introducing a legislation frame incorporating all aspects and levels and promoting them in a balanced way.
- Managing Special Schools, as distinctive and complete school units
- Managing Special Needs in Mainstream Schools
- Managing new teacher Professionalism
- Organizing, extending or remodelling sections and services so as to implement change. Specifically:
 - a. Extending Secondary Special Education
 - b. Setting out structures for the cooperation between SNE/DACs and schools
 - c. Managing change in parental attitudes
 - d. Assessing and evaluating SNE structures.

In short, any educational reform should be holistic and based on a theoretical background - a priori analyzed and discussed in detail – under research and scientific consultancy.

These perspectives, if implemented, will allow ISNE to take its rightful position within the Greek Educational System as well as the prevailing social system as befits a modern EU member state. It will also give parents, teachers and other educational practitioners the opportunity to promote their ideas, skills and abilities in the SNE area, and above all, it will create for SNE students the right environment for a meaningful education which hitherto in many cases has been denied to them.

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