



Factors inhibiting Montana school district reorganization  
by Gary Leon Webber

A thesis submitted in partial fulfillment of the requirements for the degree of Doctor of Education  
Montana State University  
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Abstract:

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These factors were addressed in the surrounding states primarily by carefully involving all segments of the population in all stages of the process of district reorganization and by providing financial incentives with state funds to offset any increased costs in transportation or in necessary new construction.

A handbook was produced which provides recommendations to the Montana State Legislature for appropriate reorganization legislation.

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DISTRICT REORGANIZATION

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ABSTRACT

The problem addressed by this study was to determine the primary factors that inhibited school district reorganization in the State of Montana. The second problem was to determine what neighboring states had done to alleviate those problems in their reorganization programs.

The first problem was studied by use of a survey of a stratified random sampling of districts that had been suggested for closing in an earlier study. The second was addressed by a review of literature.

The four factors selected as the major retarding factors were: 1. Consolidation would adversely affect the town. 2. Consolidation would adversely affect the students. 3. Consolidation would result in less efficient expenditures and increase total costs. 4. Consolidation would decrease local control.

These factors were addressed in the surrounding states primarily by carefully involving all segments of the population in all stages of the process of district reorganization and by providing financial incentives with state funds to offset any increased costs in transportation or in necessary new construction.

A handbook was produced which provides recommendations to the Montana State Legislature for appropriate reorganization legislation.

## CHAPTER 1

## INTRODUCTION

As the westward expansion of the United States occurred and large areas were settled, a large number of school districts were formed. In 1932 the United States had 127,649 school districts (Burrup,1977:89). In the last fifty years states found that the large numbers of school districts created problems in coordinating the functions of education and made the equalization of financial support for schools from local taxpayers difficult to achieve. Most states have, at various times within their history, made some effort to reduce the number of school districts within their boundaries. By 1945 the number of school districts in the United States had been reduced to about 103,000 and by the beginning of the 1956-57 school year the number of districts was reduced to 54,000 (Fitzwater,1958:3). In 1980 the number had been further reduced to 15,987 (Education Commission of the States, 1981:3).

State legislatures have moved to alleviate the problem of too many school districts in different ways. Legislation that has been passed was either permissive to allow for redistricting or mandatory to force redistricting within the

state. Some reorganization legislation has provided for the existing state department of education to direct the reorganization process while other states have passed legislation in which a new state level agency was created to oversee and direct the reorganization of school districts (Fitzwater,1958).

Some states have made very slow progress in reducing the number of school districts within the state while others have made dramatic reductions (Hooker,1970). Montana, with its permissive legislation, has shown a gradual reduction in the number of operating districts (Skarr,1970). Accelerated reorganization of school districts within Montana has been recommended in two statewide studies; in doctoral dissertations at Montana State University and the University of Montana; and in several master's theses (Public Schools of Montana,1958; Montana Report,1960; Barnett,1974; Anderson,1970; Hilton, 1966; Skarr,1970). Two reasons given for statewide reorganization included: 1. A need to eliminate areas under the control of a high school board and a separate elementary board. 2. A need to eliminate excessively small districts (Public Schools of Montana, 1958:62). Anderson, in his master's thesis, suggested that the consolidation of certain districts would lead to more efficient use of available resources (1970:34). Mattocks found per pupil costs to be excessive in some of the smaller districts that he studied. Each of these districts was

adjacent to a larger district (1972:57,58). Barnett concluded that improved educational programs and increased opportunities for students could be accomplished by reorganizing the districts in his study area (1974:149).

#### Statement of Problem

The problem addressed by this study was twofold. The first was to determine the primary factors that have inhibited school district reorganization in Montana. Secondly the reorganization processes used by neighboring states was examined to determine how those factors identified in the first part of this study were dealt with in the reorganization plans in those states.

The study resulted in a handbook that offered a historical perspective of Montana school district formation, recommendations that have been made for school district reorganization by major statewide studies, factors that have inhibited reorganization in Montana, and suggestions for reducing the strength of those factors in reorganization of school districts.

#### Need for the Study

In 1958 and 1960 the results of two major statewide studies of Montana schools were released. Each study contained recommendations for restructuring the school districts of Montana (Public Schools of Montana, 1958;

Montana Report, 1960). A doctoral dissertation (Skarr, 1970) resulted in recommendations for restructuring high school districts within the state by closing a number of schools. No major changes were made in Montana school district organization as a result of these studies.

Recognition by legislators that school problems are reaching an acute state led to the appointment of an interim legislative committee of the Montana state legislature during the 1981 session. The charge to this committee was to consider the problems of educational finance and other school related problems and to seek possible solutions (Montana State Legislature, 1981). The foundation program was modified by the 1983 legislature to increase the basic county wide school tax levy in an effort to equalize tax efforts among school districts in the state.

During the 1981 session of the Montana Legislature, Senate Bill 43 was introduced by Senator Blaylock of Yellowstone county. This bill would have required high schools with ninety-nine or fewer students for two consecutive years to apply for isolated status or else the district would be forced to fund a portion of the state's share of the foundation program from district sources (Montana State Legislature, 1981).

The financial problems of school districts have become acute (Negus, 1981). School financial problems were so acute that the first class school districts in the state

considered filing a lawsuit against the state government in an attempt to force the state into providing a higher level of equalization funding for schools (School District #7,1981). In 1985 a class action suit challenging the foundation program and the state funding of the foundation program was filed by a coalition of school districts that had a low taxable value when computed on a per student basis.

The small change in the number of school districts following the studies of Montana schools and the challenges to the financing of Montana schools illustrated a need for the study.

#### Questions to be Answered

This study attempted to answer the questions: 1. What factors have inhibited school district reorganization in Montana? 2. How have neighboring states addressed those factors in their school district reorganization plans?

#### General Procedures

There were two problems addressed by the study. The first problem was to determine what perceived factors have prevented school district reorganization from occurring in Montana in spite of studies that strongly recommended reorganization. The second was to determine what neighboring states have done to overcome those factors in

implementing their reorganization plans. The first problem was addressed by the use of a survey of randomly selected students, administrators, and patrons. They were selected from those districts that were recommended for closure in Dr. Skaar's dissertation (Skaar, 1970). The second problem was addressed by a survey of the available literature from and about the neighboring states that have reorganized their school districts.

A handbook was produced as a result of the study. It will be used to provide information to legislators, educators, and other interested people.

#### Delimitations

Reorganization legislation and procedures were examined for the states of Washington, Idaho, Wyoming, Colorado, North Dakota, and South Dakota. The attitudes of people within Montana relative to reorganization of school districts was assessed only for the districts selected to be surveyed.

#### Definition of Terms

1. School District. A school district is a quasi-corporation, authorized or established by the state for the local organization and administration of schools. It is comprised of an area within which a single board has the responsibility for, and commonly has considerable

autonomy in, the organization and administration of all public schools. It usually has certain powers, including the power to specify tax levies for school purposes, that have been delegated by the state (Barnett,1974).

2. School District Reorganization. The act of legally changing the designation of a school district; changing the geographical area of a school district or incorporating a part or all of a school district with an adjoining district (Hooker,1970).

3. Non-operating School District. A district which has failed to maintain a public school for a specified period of time (Hooker,1970).

4. State Department of Education. This department is headed by a chief state school officer who is called the Superintendent of Public Instruction in Montana. The department includes the chief state school officer and his staff. It is authorized by and functions in accordance with provisions of law and policies adopted by the legislature and the state board of public education.

5. Office of the Superintendent of Public Instruction (OPI or OSPI). This is the title of the state department of education for Montana.

6. Per Pupil Expenditure. Actual general fund expenditures converted to a per pupil amount.

7. Consolidated or Reorganized School District. Any school district serving territory once served by two or more

districts.

8. Average Daily Attendance (ADA). The term denotes aggregate attendance divided by the number of pupil instruction days.

9. Average Number Belonging (ANB). A term defined by the Montana foundation program law for calculating state equalization aid to schools. The aggregate number of days present and days absent for all enrolled students is divided by 180 to generate the ANB for the school district. A student is dropped from enrollment for this calculation after ten consecutive absences.

10. Educational Opportunity. Educational opportunity will refer to the breadth of curriculum offerings and to the number and type of special services available to students.

11. Patron. Patron refers to any person within the school district who affects the school or who is affected by it.

## CHAPTER 2

## REVIEW OF LITERATURE AND RELATED RESEARCH

This chapter will present a historical perspective on the development of school districts and how districts have changed as a result of redistricting. Reasons given for redistricting by educational theorists, educators, and legislators will be examined as will the reasons presented for not consolidating or redistricting. Features of reorganization legislation as used in various states will be reviewed. Procedures used in establishing a reorganization program with emphasis given to the factors which retard redistricting will be presented. Also the resulting guidelines for retention or reorganization of districts will be given.

District Formation

The state, acting through the legislature, may create whatever type of local school administrative organization it may desire. This is a direct consequence of the power given to state legislatures in the Tenth Amendment to the United States Constitution. "The powers not delegated to the United States by the Constitution, nor prohibited by it to the states, are reserved to the states respectively, or to

the people" (qtd. in World Book 4: 798p).

School districts within the state of Montana were formed as a need for schools was felt. A group of parents of ten census children between six and twenty-one years of age could petition to form a school district in their area (Codes and Statutes of Montana, 1895). This resulted in the formation of small school districts in the state wherever a need was felt and a large number of districts were established. The codes also allowed for the formation of school districts by unifying two districts (Codes and Statutes of Montana, 1895).

#### Reasons for Reorganization

Reasons given for reorganizing smaller school districts into larger ones fall into financial, curriculum, or improvement of staff categories.

Improved staff in the form of more professional leadership, more competent staff and better counseling services have been reported (Cocking, 1961).

#### Financial

The financial reasons usually given to justify school district reorganization fall into two categories. These are tax effort equalization and better or more efficient use of tax dollars (Skaar, 1970; Fitzwater, 1958).

Tax effort equalization is sought by enlarging school

district boundaries to include both low and high taxable value areas which results in new districts with taxable values somewhere between those that existed in the older districts. The taxpayers in the portions of the new districts that had previously been low valued would pay a lower percentage rate of property taxes while those taxpayers that lived where the higher taxable values had been would pay a higher rate of taxes. This provided an equalizing effect upon the property taxes paid in the state (Skaar, 1970).

Statewide reorganization can be used to decrease the spread between the highest and lowest tax rates applied within school districts. Skarr estimated that his proposed reorganization of high school districts in Montana would result in a drastic reduction in the range of taxable values per pupil in high school districts of the state. The range of the taxable values per pupil in high school districts of Montana at the time of his study was from \$7,722 to \$145,136 for a range of \$137,414. He estimated that the taxable values per pupil in the reorganized high school districts would be from \$9,583 to \$35,952 for a range of \$26,369. The range of taxable values per pupil in school districts under the reorganization plan would have been only nineteen percent of the range in taxable valuation per pupil in districts that existed in Montana at the time of his study. The reorganization proposed would have had an equalizing

effect within Montana high school districts (Skarr, 1970).

The second financial reason was for the effective and economical use of tax dollars (Fitzwater, 1958). This has been interpreted by some to indicate that the reorganized districts will spend less money than the combined amount previously spent by the original districts. Wilcox (1959: 26) and Phillips (1967:32) found that the reorganized districts cost more to operate because the reorganized districts provide a wider range of curriculum offerings and a better qualified staff. The Massachusetts Governor's Commission (1974) found that smaller districts "find it difficult to support adequate staff training and renewal programs" and "...to achieve operating economies in purchasing, transportation, and central administration." The financial economy is in efficiency terms rather than in absolute dollars. Butler (1985:361) cautions about assuming the financial benefits of consolidation with the statement: "The analysis shows that scale economies enjoyed by large districts can come at the expense of efficient production of education outcomes."

### Curricular

The proponents of consolidation feel that larger districts are better able to provide for a better than adequate system of course and service offerings. The Massachusetts Governor's Commission (1974) found that the

number of courses available to students in the larger districts exceeded the course offerings available in smaller districts. A large district can attract a higher quality of professional leadership, step up provisions to care for individual differences, and can attract a more competent staff, better counseling services, more library and audio-visual facilities and a wider range of educational tools (Cocking, 1961:62).

Wilcox (1959:26) cautioned that it is a misconception to suppose that the products of the reorganized school districts are superior academically to those from the original districts since there have been no definitive studies to demonstrate that they were superior. A study of Montana schools with respect to the affective domain and individual and society concerns done by Edington and Gardner resulted in the following statements (Edington, 1984;1-2):

"The affective domain covers the areas of communications attitude, attitude toward school, character, cooperation, and change. ...the majority of results were negative indicating that the smaller schools in Montana received higher scores than the larger schools." and "The area of individual and society covers the areas of fitness, citizenship, careers, and environment. ...the smaller schools in Montana received higher scores than the larger schools."

Most authorities, who have studied reorganized districts, have found more positive attributes than negative in reorganization.

### Redistricting Legislation

Successful reorganization legislation has certain common features. These include a statewide approach to reorganization under the auspices of a state level body which provides planning policies and assistance and provisions for county or other local committees who will have the responsibility for planning the reorganization and for submitting the plan to the local voters for ratification (Fitzwater, 1957:17).

Fitzwater added to the list of characteristics of good reorganization legislation to include the need for comprehensive legislation that would repeal all existing reorganization laws and have no fixed expiration limit. It would be comprehensive enough to apply to all types of districts that could be established and apply to all redistricting needs in the state. The state commission, which would continue as long as necessary, should be composed primarily of lay people selected for overlapping terms which are long enough to avoid rapid turnover (Fitzwater, 1958:35).

### Results of Redistricting

While financial claims for reorganization may be overstated, improvements in financial efficiency are found when school districts are reorganized (Riew, 1966:284). An

improved tax base and a resulting better use of tax money result when districts are reorganized (Merrill, 1965:113).

Burruap found that while the moneys saved in reorganization were often used to provide a better school program rather than reducing total costs, the range of taxable values was reduced and state support formulas could be simplified (1977:89).

Place found in his study of reorganized districts in Montgomery County Pennsylvania that while spending priorities were shifted to instruction, health services and operation of the plant per pupil expenditures decreased significantly (1971:1804).

These studies concluded that educational opportunities would be greater in a larger district since a larger district could better provide for individual differences; provide more library, audio visual, health and guidance services; offer a broader and better educational program; and attract a higher quality of professional leadership and teachers and thus offer a better education and more opportunities to all students more efficiently.

Smith found a potential for reducing the transportation costs and the number of vehicles by one third in his study of redistricting the schools of Adams County Pennsylvania (1964:837).

Factors that Inhibit Redistricting

Various factors that inhibit reorganization have been studied. One such factor was the mechanism that provides state funding for school districts. If the state aid was granted according to the number of teachers or too much aid was given to very small schools so that income from state sources would be lost upon consolidation of districts then resistance to the redistricting resulted (Educational Research Service, 1974).

If state equalization funds were granted for current expenses in such a way that the new consolidated district faced a large increase in property taxes for the first year of operation there was resistance to reorganization of the districts (Educational Research Service, 1974).

Resistance to reorganization occurred when districts were classified according to population and the percent of the cost of schools paid by the state was greatest for the smallest class of districts so that the total state revenue declined when districts consolidated (Educational Research Service, 1974).

Insufficient state aid for pupil transportation or for the construction of new buildings made necessary by consolidation along with the increase in these costs following consolidation led to resistance to consolidation (Educational Research Service, 1974).

Some resistance to school district reorganization occurred when patrons of a district perceived that a loss of tax advantage would occur. This was expressed by the authors of a study of South Dakota schools done by the Bureau of Field Studies and Surveys of the College of Education of the University of Minnesota, "The school organization may be perceived by some people as a vehicle for comparative tax advantage, for community identification, or to achieve various personal goals" (University of Minnesota, 1969).

#### Criteria for Reorganization

The National Educational Finance Project (NEFP) presented the guidelines to be considered by state legislatures in their efforts to encourage school district reorganization. These called for a thorough examination of current state codes followed by the appointment of state and local reorganization committees which would undertake statewide studies to determine the extent of the need for reorganization. The NEFP recommended that legislation and regulations be clearly written so that lay people could understand them and so that they could be uniformly enforced. Provisions needed to be made for citizen involvement including equitable voting procedures (1971:115).

The Project listed incentives which could be used to

encourage school district reorganization. These included provisions for the state to assume part of bonded indebtedness of the original districts and to provide state support for a portion of the indebtedness for any new construction required by reorganization. Other state aid in dealing with increased transportation costs and bonus aid on a per pupil basis could be given to encourage reorganization. Also helpful were provisions to guarantee that the state aid to the new districts was not less than the total state aid that would have been given to the original districts if they had remained independent (NEFP, 1971:115).

Tuition aid that made it cheaper to send students to another district than to operate a school and too much aid to small districts were fiscal provisions of state financial aid policies that discouraged reorganization (NEFP, 1971:117). A lack of enforcement of minimum state school accreditation standards also discouraged reorganization (NEFP, 1971:117).

#### Procedures for Implementation

Reorganization procedures were implemented by procedures mandated in legislation. Garber made the following statement regarding state governments and school district reorganization: "Since education is a state concern, school districts may be created with or without the

consent of those who live in them." He also stated: "The state is unrestricted in its choice of method of establishing school districts (Garber, 1962:3-4)".

Morphet asserted that only the citizens of each state could be responsible for developing a school district reorganization plan. He suggested using a special committee or some other group authorized by the legislature to provide for the gathering of opinions and the general design of the reorganization proposals (Morphet, 1971:173). Several states have used surveys and studies as a basis for generating ideas for the process to be used in reorganization. In the report prepared by a group from the George Peabody College for Teachers (Division of Surveys and Field Services, 1958:58) the following reorganization procedure was presented:

1. The state agency should formulate standards or criteria for reorganized districts and attendance areas.
2. The state should approve or disapprove reorganization plans developed by county committees.
3. Meeting the state standards should be mandatory.
4. When a county plan is disapproved, the county committee should be required to submit a revised plan.
5. A majority of the total vote cast should be required.

Existing state boards of education or the chief state school officer were most commonly given the state level

responsibility for directing school district reorganization. Some states used special advisory commissions or committees that operated through the state education agency to coordinate reorganization programs while other states used committees which were completely independent of the existing state agency (Fitzwater, 1958:11). In most cases either the chief state school officer was a member of the state level committee or else a representative of the state board of education was appointed to it (Fitzwater, 1958:11).

Fitzwater (1958:11) emphasized that a state agency needed the power to approve or reject a county plan. He suggested that the state administrative responsibilities should include the development of principles, policies, and procedures for conducting the programs; furnishing professional personnel to assist in conducting the programs; and examination of reorganization plans developed by local committees. This would be followed by approval of the plan or disapproval of the plan with recommendations for changes in it.

#### District Characteristics

Studies have been done that provide information about the characteristics that school districts should have. Many of the studies dealt with the size of high schools. Since the size of the high school is directly related to the number of students in the elementary feeder schools these

studies can be used to project the number of students that should be contained in a proposed district. In a study of Iowa schools that did not consider transportation costs, Elchanan (1968:433) suggested an optimal school size of 1500 pupils in average daily attendance. Osburn (1970:114) in his study of school costs in Missouri found that most of the economies of scale had been realized as student numbers approached 1500. After a study of Wisconsin schools, Riew (1966:284) questioned whether schools with an enrollment of more than 701-900 provide additional economies.

In extensive studies in Oklahoma, White and Tweeten (1973A:359) studied the most cost effective size for high schools and included not simply the size but the effects of student density and related transportation costs as well. They found that the most cost effective size depended upon both the transportable student population density and upon the breadth of the curriculum offered. In their mathematical model of school districts with costs per pupil compared to size, they projected substantial economies to approximately fifteen hundred ADA. When the transportable ADA was 1.8 pupils per square mile and no student was to ride the bus for more than one hour they came to the following conclusions (White, 1973A:364; 1973B:51):

For a high school with a minimum program of 38 academic units and no vocational units the optimum size is 550 ADA.

For a high school with a standard quality program of 30 academic units and 8 vocational units the optimum size is 800 ADA.

For a high school with a desirable program of 38 academic units and 8 vocational units the optimum size is 900 ADA.

White and Tweeten (1973A:366) found the most cost efficient school size for the combined elementary and high schools when transportation was included to be three hundred ADA when the population density was 0.6 students per square mile. The size increased to 1075 ADA when the population density was 3.0.

Ronning (1963:21) in a study of Sheridan County Montana concluded that an elementary school should provide at least one teacher per grade and a desirable maximum size between five hundred and six hundred pupils with no student required to ride a bus for an unreasonable length of time. For high schools the minimum size should be about four hundred students with a minimum of seventy-five in grade twelve. He also concluded that districts which need not coincide with county, township or city boundaries, should provide a program from grade one through grade twelve.

## CHAPTER 3

## PROCEDURES

Introduction

The focus of this study was to determine what factors have prevented the rapid reorganization of Montana school districts when there have been major studies suggesting extensive reorganization. The purpose of this study was to identify the factors that have inhibited the reorganization of Montana school districts and to identify processes which might be used to overcome those factors. In this chapter the populations surveyed, the procedures used in gathering the data, and the use of that data is discussed.

The primary procedure involved in this study consisted of a survey to identify factors which inhibited school district reorganization in Montana. These factors were those that were perceived by people who lived in, attended school in, or worked in districts that had been identified as candidates for consolidation in a study done by Skaar in 1970.

The responses from the questionnaire were tabulated to identify the most frequently occurring responses. The

responses were weighted and totaled. These totals were used to pick the inhibiting factors to be reviewed in the rest of the study.

The second procedure was to study the reorganization programs used in the states of Washington, Idaho, Wyoming, Colorado, North Dakota, and South Dakota to identify procedures, if any, that were used to offset the retarding factors identified as inhibiting school district reorganization in Montana.

Finally a handbook was prepared which summarized the findings of this study and presented suggestions for minimizing the resistance to school district reorganization if that should prove desirable. The handbook was designed to have a readability level of approximately ninth grade and is for the use of legislators, educators, and others interested in school district organization.

#### Population and Sampling Procedure

The population for this study consisted of four groups of people. The first was the patrons of school districts that have been chosen for study. The second was educators in those same school districts. The third was members of the state legislature or local elected officials representing those areas. The final group was high school students from schools within those districts.

Skaar (1970:131) presented a list of school districts

that he felt should be closed in order to make Montana school districts more efficiently organized. Districts that have closed or consolidated were removed from the Skaar's list and those remaining were used for the study (Appendix A).

A stratified random sample of the population of each group within the districts was chosen to receive the questionnaire (Appendix C) that had been developed for the study. The total population of all four groups in the districts chosen was 21,688 people. The sample size was determined by using the Cochran formula (Cochran, 1977) which assures a ninety-five percent confidence that the sampling error will be five percent or less. The subpopulations consisted of 225 elected officials, 473 educators, 3501 students, and 17,489 patrons. The total sample necessary as computed using the formula was 378 as is displayed in Appendix B. The subpopulation samples were then computed by simple ratios to be: four elected officials; eight educators; sixty-one students; and 305 patrons as is displayed in Appendix B (Tippet, 1956:1465).

The participants in the survey were chosen at random from the populations of the sample districts. The patrons were chosen from telephone listings. The telephone listings were put in alphabetical order by the names of the communities. When the end of one community listing was reached the count continued at the beginning of the listing

for the next community. A random starting point was selected in the listing of the first community for the first name and every fifty-seventh name thereafter was chosen until the required 305 names were selected. The interval of fifty-seven was selected by dividing the total population of 17,489 available by the sample size of 305.

The educators were chosen by generating a list of eight random numbers using a microcomputer. Those numbers were then correlated to a list of positions that had been generated by using the alphabetical listing of the school districts and the number of teachers within each district. Educators were then identified by name and surveys were mailed to those who had been selected.

The students were selected by generating a list of random numbers containing the necessary sixty-one students. The names of the schools were alphabetized and the total student population was numbered. These numbers were used to select students from the alphabetical listings of the high school classes that are maintained by the high school office for attendance purposes. The listings for classes were used in reverse grade order from twelfth to ninth in selecting names.

The political officials were chosen by generating a list of positions in the population and then generating four random numbers between one and 225 with a microcomputer to match the list to select those who were surveyed. Officials

were then identified by name and a survey was mailed.

### Data Collection

Data about the factors that have retarded school district reorganization was gathered by using a questionnaire to survey the selected members of the populations. The items used to generate questionnaire questions were selected from factors found in the survey of literature as retarding school district reorganization.

The questionnaire used was tested for face validity by submitting it for review by Dr. Leroy Casagrande of Montana State University for comments and suggestions for improvement.

Reliability was established by using a test-retest procedure on a selected group that represented each of the populations.

Of the 378 questionnaires that were sent out, 313 were returned for a return percentage of eighty-two and eight tenths. Of these, 247 were from parents and patrons, fifty-five from students, seven from educators, and four from elected officials. This represents an eighty-one percent return from parents and patrons, ninety percent from students, eighty-seven and one half percent from educators, and one hundred percent from the elected officials.

When major inhibiting factors had been identified from the questionnaire, the procedures and laws of the selected

states were surveyed to identify how the reorganization process in each of the states was organized. The major steps and processes were outlined and compared with the list of inhibiting factors from Montana so that procedures could be identified that had been used in those states to limit the effects of those factors.

#### Organization of Data

The data gathered from the questionnaire was presented in summary table form to display the frequency of response to each of the questions on the surveys from the four subpopulations, weighted responses, and totaled and weighted totals.

Four factors were chosen as significant for further study. They were selected by choosing the four that had the highest point totals. Points were assigned by taking the number of responses from each item of the questionnaire multiplying by one if it was in the "agree" column and by two if it was in the "strongly agree" column of the questionnaire. It was multiplied by negative one if in the "disagree" column and by negative two if in the "strongly disagree" column. The signs of the multipliers were reversed for questions posed in a manner such that to disagree with the question was to agree with the statement that the question was designed to test. Where multiple questions addressed the same topic the sum of the total

points for each item assigned to that topic was divided by the number of questions so that no topic was selected only because it was addressed by a larger number of questions on the survey than any other topic.

The inhibiting factors were identified by selecting the four factors with the most points. The legislation and procedures from the selected states were then examined to search for procedures that might be used to overcome the identified inhibiting factors that exist in Montana. This was accomplished by reviewing the steps outlined in those procedures or in the reorganization legislation to determine if any of the steps or procedures could be used to address the perceived inhibiting factors in Montana.

The results were summarized and were presented as a part of the handbook that was developed to present the information gathered to interested parties. The handbook was written at a readability level of approximately grade nine. The readability level was determined by using the "fog index" (Gunning, 1964) which is a procedure that is commonly used by reading teachers and other professionals to determine how difficult material is to read. It was printed in an appropriate size and the illustrations were validated for their effectiveness. The handbook will be made available to legislators, the Office of Public Instruction, and other interested parties by sending copies to the Speaker of the House, the President of the Senate, the

Superintendent of Public Instruction, and the libraries at  
the University of Montana and Montana State University.

## CHAPTER 4

## RESULTS

This chapter will present the responses to the survey, explain the raw data, the processed data, the perceived retarding factors and responses to those factors as found in the reorganization programs of the adjoining states.

Survey Results

Of the 378 questionnaires that were sent out, 313 were returned for a return percentage of eighty-two and eight tenths. Of these, 247 were from parents and patrons, fifty-five from students, seven from educators, and four from elected officials. This represents an eighty-one percent return from parents and patrons, ninety percent from students, eighty-seven and one half percent from educators, and one hundred percent from the elected officials.

Tables 6 through 15 in Appendix D show the responses to the survey questions by the groups surveyed, the weighted responses, the summary data for those responses and the weighted totals for each question.

The survey questions were each matched to one of eighteen general statements concerning attitudes towards the

anticipated results of consolidating schools or attitudes about what process should be used if consolidation of schools were to be done. The list of survey questions attached to each of the general statements is found in Appendix E. These general statements were matched to factors identified in the review of literature which retard school district consolidation.

The retarding factors and the general statements which are matched up with them are listed in Appendix E. The retarding factors which were considered were:

1. Taxes would be adversely affected and financial efficiency lost.
2. Local control of the schools would be lost.
3. Reorganization would have a negative impact upon the students.
4. Reorganization would have a negative impact upon the town.
5. Reorganization would lead to a loss of desirable programs and staff.
6. Reorganization would cause a loss of contact with the teachers of the students.

The weighted score that each of the eighteen statements received was generated by multiplying each response by the proper weighting factor, summing all of the scores of responses attached to that factor, and dividing by the number of responses addressed to that general statement. The weighting factors were two for "strongly disagree", one for "agree", negative one for "disagree", and negative two

for "strongly disagree" except that in the cases where the direction of the general statement and the specific questionnaire statement were reversed the multiplier was negative two for "strongly agree", negative one for "agree", one for "disagree", and two for "strongly disagree".

The weighted scores for parents and patrons which are presented in Table 1 showed an awareness of the stated needs for consolidation and agreement that consolidation would probably lead to an improved school staff and a broader school curriculum. They felt strongly that the voters should control redistricting and that the state should not encourage consolidation. They felt that consolidation would adversely affect the students and the town. They did not feel that consolidation would decrease taxes or make expenditures more efficient. They did feel that consolidation would make taxes more equitable. They did not feel a need for the way the state finances small schools but felt consolidation would be unnecessary change.

The weighted response totals for the students as shown in Table 2 indicated a feeling that consolidation would provide a broader curriculum but indicated that they felt that the school staff would not be improved. They felt that services to the students would be adversely impacted. They felt that parent contact with the schools would be lessened.

The students felt that taxes would not be decreased and that expenditures would not be more efficient.

Table 1

Summary Weighted Totals for Parents and Patrons  
(Negative indicates disagreement)

1. Consolidation would decrease taxes.	-23
2. Consolidation would decrease local control.	0
3. Consolidation would improve the school staff.	11
4. Consolidation would provide broader curriculum.	71
5. Consolidation would provide better service to individuals.	-43
6. Consolidation would make taxes more equitable.	93
7. Voters should control redistricting.	205
8. The State should encourage consolidation.	-75
9. District structure should be set by the state.	-136
10. Consolidation would adversely impact the town.	79
11. Consolidation would lessen parent contact with the schools.	-65
12. Consolidation is unnecessary change.	-19
13. Consolidation would adversely affect the students.	74
14. I am aware of a need for consolidation.	82
15. Change is needed in the way the state finances small schools.	-81
16. Consolidation would provide for more efficient expenditures.	-20
17. Consolidation should be limited in scope.	-155

Table 1 (continued)

18. School district administrators should promote consolidation.	-20
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Students felt that consolidation would adversely affect the town and that the state should not promote consolidation.

They felt that the state need not change the financing of small schools and that the state should not promote consolidation which should be controlled by local voters if it is done. They showed a low degree of awareness of a need for consolidation.

Table 2

Summary Weighted Total for Student Responses  
(Negative indicates disagreement)

1. Consolidation would decrease taxes.	-38
2. Consolidation would decrease local control.	15
3. Consolidation would improve the school staff.	-2
4. Consolidation would provide broader curriculum.	26
5. Consolidation would provide better service to individuals.	-38
6. Consolidation would make taxes more equitable.	11
7. Voters should control redistricting.	32
8. The State should encourage consolidation.	-20

Table 2 (continued)

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9. District structure should be set by the state.	-32
10. Consolidation would adversely impact the town.	33
11. Consolidation would lessen parent contact with the schools.	28
12. Consolidation is unnecessary change.	39
13. Consolidation would adversely affect the students.	48
14. I am aware of a need for consolidation.	3
15. Change is needed in the way the state finances small schools.	-34
16. Consolidation would provide for more efficient expenditures.	-21
17. Consolidation should be limited in scope.	-11
18. School district administrators should promote consolidation.	1

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The weighted responses of the educators as shown in Table 3 showed an awareness of a need for consolidation but did not feel that consolidation would decrease taxes. They did exhibit a strong feeling that consolidation would make taxes more equitable but did not indicate a feeling that it would make spending more efficient. They exhibited a strong feeling that voters should control any consolidation and that the state should not set district structure. They were neutral on whether consolidation would improve the school

staff or adversely impact the town. They did show a feeling that services to individual students would be improved. They did not feel that consolidation was unnecessary change.

Table 3

Summary Weighted Total for Educator Responses  
(Negative indicates disagreement)

1. Consolidation would decrease taxes.	0
2. Consolidation would decrease local control.	2
3. Consolidation would improve the school staff.	0
4. Consolidation would provide broader curriculum.	1
5. Consolidation would provide better service to individuals.	3
6. Consolidation would make taxes more equitable.	8
7. Voters should control redistricting.	7
8. The State should encourage consolidation.	-1
9. District structure should be set by the state.	-6
10. Consolidation would adversely impact the town.	0
11. Consolidation would lessen parent contact with the schools.	-3
12. Consolidation is unnecessary change.	-1
13. Consolidation would adversely affect the students.	2
14. I am aware of a need for consolidation.	4

Table 3 (continued)

15. Change is needed in the way the state finances small schools.	-4
16. Consolidation would provide for more efficient expenditures.	0
17. Consolidation should be limited in scope.	-4
18. School district administrators should promote consolidation.	-2

The weighted response totals for elected officials as shown in Table 4 indicate a strong feeling that school consolidation is a necessary change. They felt that the state should encourage consolidation but indicated a strong feeling that it should be controlled by the voters. They indicated a feeling that while the curriculum in consolidated schools would be broader the services to students might suffer somewhat. They did not feel that parent contact with the schools any less. They did not indicate any feeling that the state should change the way it finances small schools.

Table 4

Summary Weighted Totals for Elected Official Responses  
(Negative indicates disagreement)

1. Consolidation would decrease taxes.	2
2. Consolidation would decrease local control.	-1

Table 4 (continued)

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3. Consolidation would improve the school staff.	-2
4. Consolidation would provide broader curriculum.	1
5. Consolidation would provide better service to individuals.	-1
6. Consolidation would make taxes more equitable.	2
7. Voters should control redistricting.	5
8. The State should encourage consolidation.	1
9. District structure should be set by the state.	-3
10. Consolidation would adversely impact the town.	0
11. Consolidation would lessen parent contact with the schools.	-3
12. Consolidation is unnecessary change.	-4
13. Consolidation would adversely affect the students.	1
14. I am aware of a need for consolidation.	3
15. Change is needed in the way the state finances small schools.	0
16. Consolidation would provide for more efficient expenditures.	-1
17. Consolidation should be limited in scope.	-3
18. School district administrators should promote consolidation.	-2

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The summary responses using the weighted totals of all

four groups of people as presented in Table 5 shows the feeling that limited consolidation where only certain expensive programs are shared is not a desirable option since it received a strongly negative response. There was an indicated awareness of the need for consolidation and a strong feeling that a broader curriculum would be provided after consolidation. There was a feeling that consolidation would not have a negative effect upon parent contact with the schools.

There was strong feeling that consolidation would have a negative impact upon the town in which the school was located and that there would be a negative impact upon the students of the schools. Other strong negative feelings towards consolidation were shown by a fear that local control would be lost and that the total expenditures and taxes after consolidation would increase.

Table 5

Weighted Total of All Responses  
(Negative indicates disagreement)

=====	
1. Consolidation would decrease taxes.	-74
2. Consolidation would decrease local control.	27
3. Consolidation would improve the school staff.	7
4. Consolidation would provide broader curriculum.	99

Table 5 (continued)

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5. Consolidation would provide better service to individuals.	-86
6. Consolidation would make taxes more equitable.	114
7. Voters should control redistricting.	72
8. The State should encourage consolidation.	-99
9. District structure should be set by the state.	-177
10. Consolidation would adversely impact the town.	87
11. Consolidation would lessen parent contact with the schools.	-97
12. Consolidation is unnecessary change.	16
13. Consolidation would adversely affect the students.	107
14. I am aware of a need for consolidation.	92
15. Change is needed in the way the state finances small schools.	-119
16. Consolidation would provide for more efficient expenditures.	-42
17. Consolidation should be limited in scope.	-173
18. School district administrators should promote consolidation.	-23

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#### Retarding Factors

The four factors selected as the primary inhibitors to school district reorganization in Montana from the general statements that have been presented were in order of

perceived importance by numerical totals:

1. Consolidation would adversely affect students.
2. Consolidation would decrease local control.
3. Consolidation would adversely impact the town.
4. Consolidation would result in less efficient expenditures and increase total costs.

### Redistricting Legislation

#### Montana

Montana has permissive reorganization legislation that provides some financial incentives to districts for consolidation. These incentives may not be enough in some cases to offset the loss of revenue that results from the declining per student support of the foundation program structure. This can be illustrated by using the foundation program tables for the 1986-87 school year to examine what would happen if an elementary school with an ANB of fourteen which has one teacher and an aide were annexed to an elementary school with an ANB of 150 (School Finance and Statistics Reference Manual, 1986). The smaller school generates a foundation program amount of  $14 \times \$1888.11429$  or \$26,433.60 and the larger generates a foundation program amount of  $150 \times \$1406.192$  or \$210,928.80. The combined total of foundation program money which is provided by state and county equalization funds is \$237,362.40. The combined school with an ANB of 164 generates a foundation program

amount of 164 X \$1386.70402 or \$227,419.46 which is \$9,942.94 less than the amount generated independently. The \$500 per ANB of the smaller school in state bonus payments generates \$7000 which leaves a net loss to the combined districts of \$2942.94 which would have to be raised from district tax levies if the combined funding levels were to be maintained.

### Washington

Washington school districts were established by local settlements as need dictated and with the boundaries drawn in the most convenient manner. By 1910 the number of districts peaked at 2710. Legislation passed in the early nineteen hundreds encouraged two or more elementary districts to form separately organized union high school districts. Permissive legislation was passed in 1903 and in 1915 allowing formation of consolidated school districts which resulted in 406 consolidations by 1931-32. By 1937 there were 1609 districts left in the state.

The most significant reorganization legislation was passed in 1941, amended in 1947, and in 1955 amended again to return it to essentially the same form as the 1941 legislation. The 1941 legislation established a nine member state committee which was to function for four years. It was established to do the following (Fitzwater, 1958:300):

1. employment of a director and other personnel to enable the committee to carry

out its powers and to assist county committees;

2. furnish county committees with plans of procedure, standards, maps and forms, and other necessary materials;
3. approval of reorganization proposals submitted by county committees; and if reorganization plans were disapproved, to assist in preparing a revised plan;
4. apportionment of a county committee in any county where none had been established within the specified time limit, or where any committee had failed to exercise its assigned responsibilities within the prescribed time limits.

The county committees were established with membership representation to include each school district and each county commissioner district. The number of members was to be between seven and thirteen and the county superintendent of schools could be included but would be designated the secretary of the group if included. The committee had a year and one half to study the county schools and to prepare recommendations to be submitted to the state board for the reorganization of school districts within the county. Provisions were provided for joint committees to be established where it was desirable to consider districts that would encompass area within more than one county (Fitzwater 1958:300).

The written reports of reorganization were to include descriptions of the new and proposed districts along with the location and utilization of existing and proposed

schools and transportation plans. The plan also had to include the reasons for the reorganization and proposals for adjusting the debts and liabilities of the existing districts (Fitzwater 1958:301).

Once a plan was approved at the state level the county superintendent was required to call a special election in each proposed reorganization district. A favorable majority of all votes cast within the proposed reorganization district was required for approval of the plan. If the plan was defeated it was returned to the county committee for further study and revision for submission to the state committee and the voters again.

The codes provided that for districts that met the requirements of the reorganization legislation, the state would provide funds according to a schedule towards the costs of construction for required new buildings.

### Idaho

From the establishment of the first school in the fall of 1860, the number of school districts increased to 1110 by the fall of 1946. Following a survey by the Division of Surveys and Field Services of George Peabody College for Teachers, Nashville, Tennessee the twenty-ninth session of the Idaho Legislature in 1946-47 passed legislation directing the State Board of Education to appoint a committee of nine members to manage the reorganization

program which was a mandatory county level process. County committees, which were set up for each county, were charged with preparing a plan for reorganizing the districts in the county. The state committee had to approve each plan before it could be submitted to the voters of the areas concerned (Simmons, 1966:20).

Simmons made the following observation about reorganization in Idaho (1966,21):

"While reorganization was at first strongly opposed in many rural areas where it was believed to be discriminatory and an invasion of local rights, the acceptance by the public and even advocacy of reorganization became apparent to observers. The absence today of criticism of the reorganization provides a good evaluation of its merit"

After July 1, 1951, the State Board of Education assumed direct supervision of reorganization. This continued under the amended statute from 1963 which effectively stopped the continued reorganization of school districts in the state.

#### Wyoming

The legislature passed the Education Code of 1969 which included a section on reorganization which required completion by July 1, 1972. This was amended to allow until April 15, 1977, for the completion with some districts exempted from complying.

Title 21-5-101 of the Wyoming codes provided the purpose of the reorganization legislation to:

provide an improved and more equalized educational opportunity for all of the pupils in the state; provide a wiser and more efficient use of public funds for education by making it possible to reduce the disparity in per pupil valuation among school districts; to allow the initial planning for the organization of school districts under this chapter to be conducted on the local level; generally enlarge the school districts of the state; and eliminate the different types and kinds of school districts that presently exist and replace them with unified districts as defined in this chapter.

The criteria established for the districts to be established required the consideration of efficient administrative units, dividing the whole state into unified school districts with contiguous territory, the development of nearly the same ratio of average daily membership to assessed valuation in each district in the county, and the equalization of educational opportunity and services among the districts.

The legislation provided for a state committee to oversee the reorganization plans developed by the county committees. The state committee was composed of the state superintendent and the state board of education. The powers given to the committee were:

(i) To appoint a director and such other personnel as may be necessary to assist it in carrying out the powers and duties imposed upon it by this chapter. ...

(ii) To govern the disbursements of such funds as are provided by law for carrying out the provisions of this chapter. ...

(iii) To aid the several county committees in carrying out the powers and duties vested in

and imposed upon the county committees by this chapter, by furnishing such committees with assistance of the employed staff of the state committee and to provide such plans of procedure, standards, data, maps, and other information and services for county committees throughout the state as it appears to the state committee necessary or desirable to carry out the purposes of this chapter;

(iv) To receive, file and consider plans for the organization of unified school districts;

(v) To appoint by May 1, 1959, a county committee in a any county in which no county committee is elected as required by this chapter;

(vi) To recommend to any county committee such modifications of the plan for organization of the unified school districts of such county as may appear to the state committee more feasible to effectuate the purpose of this chapter;

(vii) To review all plans of organization submit to it and either approve such plans or reject them with reasons for rejection and recommendations for making the plan acceptable. The state committee must act upon proposals submitted by the county committees and return them to the respective counties within sixty days of the date of their receipt. The state committee shall reject a plan of organization only if it fails to comply with the provisions of this chapter. If a plan is rejected, a county committee may resubmit a modified plan as often as necessary. When a plan of organization becomes an approved plan, the state committee shall make an order establishing the unified school district according to the approved plan of organization; said order shall be the final administrative determination and shall be filed with the county clerk of each county involved within ten days of the time when the plan or organization becomes an approved plan. The order providing for establishment of the unified district shall become effective and binding ten days after it is so filed. (Wyoming Codes 21-5-108)

In the event that a county committee did not provide an appropriate plan of reorganization by June 1, 1978, the

state committee was empowered to create the plan and require its implementation.

The county committee was established by the selection of one registered voter from each school district by the board of trustees of the district. In the event that there were five or fewer districts in the county two members were selected from each district. These committees were charged with developing school organization plans for the county, holding hearings on the plan and submitting the final plan to the state committee. The recommendations had to include consideration of the use of existing buildings, the location of schools, allocation of existing indebtedness, the employment of existing personnel and the transportation requirements under the proposed plan.

The legislation provided for the state to maintain the previous total level of funding for two years if the funding that would be generated by the unified districts was less than the combined amounts that would have been received before the unification. It also provided for citizen advisory boards in communities with schools that were located more than twenty road miles from the population center of the unified school district. These boards were to advise the trustees of the district. The district trustee, within whose election area the school was located, was a non-voting member of this advisory board.

Colorado

The School District Reorganization Act of 1949 provided for the formation of county committees within ninety days of the effective date of the act except where a county contained only one school district. Membership was to come from all parts of the county with the requirement that a representative come from each first class school district and one representative for every two second class school districts. The county superintendent was to serve as a non-voting secretary to the committee. The committees were to function until all districts in the county were satisfactorily organized but not beyond July 1, 1952. County committees could disregard existing school district boundaries and with the consent of neighboring county committees even cross county lines.

The committees were charged to consider a number of factors including community educational needs, equalization of school costs, the welfare and transportation of the students, the value and use of existing facilities, the nature of indebtedness of existing districts, and the existing highways and roads (Fitzwater, 1958: 135)

The state commissioner was given the power to approve county committee plans, and his approval was needed before a proposal could be voted upon. A favorable majority of the total vote cast in the election was necessary to approve a plan. Outstanding indebtedness of a district was retained

by that district after reorganization and if a building was later sold the funds from that were first used to reduce that indebtedness.

This legislation was amended in 1951 to require a majority vote within each district to include that district in the reorganization.

#### North Dakota

In 1947 a comprehensive school district reorganization plan was passed which provided for a seven member state committee with the state superintendent as a member and the other six appointed by the governor, attorney general, and the commissioner of agriculture and labor acting as a board. The board was granted powers to appoint a state reorganization director, disburse funds appropriated for carrying on the reorganization program, assist county committees by providing a plan of procedure and other materials, to examine and approve or disapprove plans presented by the county committees, and to appoint a county committee if necessary.

Within six months of the passage of the legislation the representatives of the board of trustees of each district within the county had to meet and select one representative from each county commissioner district to act as the county committee. The committee was charged with making a study of the county, holding hearings, developing a reorganization

proposal with an equitable adjustment of property, assets, debts, and liabilities among the districts involved and to submit a recommendation to the state committee.

After the proposal was approved by the state committee an election was held with the rural territory contained within the proposed district constituting one unit and the incorporated towns or villages contained within the proposed district constituting the other unit. A favorable majority vote in each unit was necessary to adopt the proposal. A 1951 amendment changed the voting requirement to a majority vote within each old district which greatly slowed the progress of reorganization.

#### South Dakota

In 1951 legislation was passed that permitted the formation of county committees to prepare reorganization plans. The state superintendent was given the supervision of the program which included the duty to set up minimum standards, to examine reorganization plans of the county committees, hold public hearings, and to make surveys and prepare reorganization plans where the county committee failed or refused to set a plan. This legislation was permissive in that it required a petition by ten percent of the school board members in a county to establish the county committee. The committees were also able to submit plans that called for no changes in the school districts. By

September of 1954 committees had been formed in eighteen counties and elections held in three counties.

In 1966 the legislature mandated that as of January 1, 1968 all non-operating school districts would be attached to operating districts. The legislature required that prior to July 1, 1971 all land area within South Dakota would be part of an independent school district.

### Results of Redistricting

#### Montana

During the 1948-49 school year Montana had 1422 districts of which 327 were non-operating. By the 1957-58 school year this number had been reduced to 1160 with 207 non-operating (Division of Surveys and Field Services, 1958). For the 1985-86 school year there were 548 districts operating in Montana (Office Of Public Instruction, 1987).

#### Washington

During the four years after the enactment of the 1941 legislation the number of school districts was reduced from 1323 to 723 and over ninety percent of the students were in reorganized or other districts that were satisfactorily organized. After further legislation in 1947 the number of districts was reduced to 535 by June 30, 1954.

By 1982 the U.S. Department of Commerce listed three hundred school districts which was down two from the 1977

number (1986:285).

### Idaho

From the high of 1110 school districts in 1947 the number of school districts was reduced to 118 by 1961. The number of districts was halved in the first two years and halved again in the next two years after the legislation. By 1982 the U.S. Department of Commerce listed 117 school districts which was the same as the 1977 number (1986:285).

"Consolidation of the small schools into larger attendance areas permitted expansion of curriculum, reduction in, and standardization of, the size of classes, and the employment of better qualified instructional personnel at better pay" (Simmons, 1966:6).

George E. Denman, Acting Supervisor of School Reorganization, State Department of Education noted: "This simplification of school district operations has been accompanied by an increased efficiency" (Simmons, 1966:20). Simmons further note the results of reorganization to include more efficient and effective administration of schools, equalization of educational opportunity for students including a reduction in the dropout rate, better public understanding of school operations and objectives, and more nearly equalized tax rates in the state (1966:20).

### Wyoming

By 1982 there were forty-nine districts, three of which were K-8 districts, thus in the twenty-three counties there

were forty-six unified school districts. This represented an increase of one from the 1977 figure (1986:285).

#### Colorado

The high point in the number of school districts was reached in 1934 when there were a total of 2,057 districts in the state. Prior to 1949 permissive legislation existed and the number had declined to slightly more than 1900 in 1948. The reorganization legislation sparked an increase in the more permissive methods of changing the district structure even in areas where the legislation itself was not effective in establishing reorganization of school districts. This was especially true after the 1951 amendments made it more difficult for an election to succeed because a majority vote within each district was required.

By 1982 the U.S. Department of Commerce listed 185 school districts which was the same as the number in 1977 (1986:285).

#### North Dakota

The number of school districts in the state gradually increased from the time of statehood until there were 2,274 districts in 1947. This number was reduced slightly by reorganization until there were 2,111 school districts in the state in June of 1953.

By 1982 the U.S. Department of Commerce listed 325 school districts which was down from 346 in 1977 (1986:285).

South Dakota

By 1889 there were about 1,300 school districts in the state. This gradually increased until there were 3,449 in 1931 with slightly over 3,400 remaining when the reorganization legislation was passed in 1951.

By 1982 the U.S. Department of Commerce listed 196 school districts which was up two from the 1977 level (1986:285).

Mechanisms for Reducing Antagonism to Reorganization

The states in the survey area have tried various methods to try to overcome the resistance of people to district reorganization. The primary mechanism used in each case was to create a committee at the county level to deal with the study and to make the recommendations necessary for reorganization. In establishing these committees, legislatures provided ways to insure that the membership in the county committee was representative of the whole county. This was done by requiring representation from each school district or from each county commissioner district.

The other mechanism that appeared in each state reorganization plan was the provision for public hearings and for a public vote upon the plan for the reorganization of the districts before that plan became final. Some legislation allowed for approval by a majority of those voting while other required majorities from within each area

of the proposed reorganization. This allowed for the local constituents of the school district to feel that they were in control of their schools.

Many states provided for mechanisms for the transmittal of information favorable to district reorganization to the people of the state. This ranged from providing sample plans for reorganization and the results of reorganization in other areas to providing for loan of movies about reorganization and the use of a state representative to appear at public meetings to provide answers to questions and present favorable information.

In Colorado it was found that there was a direct correlation between the number of public meetings held to discuss the reorganization plan and the success of the plan at the polls. One mechanism that seemed to be quite successful was to have a committee representative speak before various clubs and organizations about the plan. The emphasis was placed on enlisting the support of community leaders within each group rather than to directly seek the support of the group itself. It was also seen as a positive factor to enlist the support of the local newspaper within each area.

South Dakota used printed reorganization bulletins designed to encourage the formation of the county committees and to encourage reorganization of districts. One bulletin contained the text of the law, another provided information

to the county committees, and a third described the various features of the legislation in layman's terms, listed the policies of the state department and contained statistical information emphasizing the need for reorganization.

The next chapter will present suggestions to all those concerned with Montana schools about school district reorganization as it might be applied to the state.

## CHAPTER 5

## CONCLUSIONS AND RECOMMENDATIONS

School district reorganization procedures used by states have ranged from very permissive to very highly structured procedures mandated by state legislatures.

The states that have shown the greatest reduction in numbers of school districts have employed some form of mandated reorganization. This was usually established by legislation that provided for a state level committee to oversee the reorganization process. Most states used some form of county or other local committees to plan the reorganization of the districts in its area. These plans were then sent to the state committee for approval.

States employed various incentives to districts for reorganization including bonus payments based upon enrollment, help in payment of existing indebtedness or help in paying for new buildings made necessary by the reorganization.

Four primary factors were found to inhibit school district reorganization in Montana. These included a fear that consolidation would adversely impact the town; adversely impact the students; increase total costs; and

decrease local control.

The mechanisms used to reduce the resistance to reorganization from these factors in the study area were to insure that all areas of a proposed reorganization area were given appropriate representation on the planning group and to insure that all areas were given appropriate representation on the governing body of the reorganized district. States also provided financial assistance to alleviate negative impact on local tax levies caused by the reorganization.

### Conclusions

Some efforts to mitigate the potential negative effects of school district consolidation upon the towns involved have come in the form of efforts to keep a school building open in each of the communities involved where it could be done without eliminating the gains in financial efficiency and curriculum that were sought in the redistricting.

The feeling that students would be adversely affected by consolidation has been combated by intensive efforts to provide full information to the people in the areas to be reorganized. This information stressed the advantages that students find in the broader curriculum, wider range of extracurricular activities, and in the increased opportunities for associated student services that are found in schools of the sizes that reorganization will create.

The concept that total expenditures in a consolidated district will be less efficient than in the original districts was approached through a thorough presentation of all the pertinent financial information available through local expenditure statistics, expenditure statistics from reorganized areas that are similar to what the proposed reorganized district would be, and through careful financial modeling and projections of what the reorganized district finances would be like. To demonstrate the relative efficiency of the reorganized district projected per pupil costs were emphasized and compared to the existing districts.

The fear that reorganization would result in increased costs from new building requirements and increased transportation needs was addressed in the planning for the reorganization. Provision for wise use of existing facilities and careful planning of the required student transportation of each proposed plan was used to provide adequate information and to insure that the total costs associated with reorganization would be minimized.

Increased building costs from new construction required as a result of reorganization were partially funded by the State of Washington. This relieved the extra burden on local taxpayers when new construction could not be avoided in designing a good plan to meet the requirements of reorganization.

Another cost related concern was that the reorganized district might be eligible for less state funding as a result of the reorganization than the total state funding that the districts would have received before the reorganization. This concern was minimized by restructuring the state school payments to guarantee that the same total funds will be available from state sources for at least the first few years after the reorganization was completed.

The feeling that students would be adversely affected by consolidation has been combated by intensive efforts to provide full information to the people in the areas to be reorganized. This information stressed the advantages that students would find in the broader curriculum, wider range of extracurricular activities, and in the increased opportunities for associated student services that would be found in schools of the sizes that reorganization would create. Many people were aware of those advantages and only needed to have their attention focused on the advantages instead of the disadvantages.

The concept that total expenditures in a consolidated district would be less efficient than in the original districts was approached through a thorough presentation of all the pertinent financial information available through local expenditure statistics, expenditure statistics from reorganized areas that were similar to what the proposed reorganized district would be, and through careful financial

modeling and projections of what the reorganized district finances would be like. To demonstrate the relative efficiency of the reorganized district projected per pupil costs were emphasized.

The concern with loss of local control was addressed by carefully structuring the county level committees to insure that all areas of the county were represented. This was done by requiring representation from each school district or from each county commissioner district. The school governing board for the reorganized districts were elected from voting districts to insure that all areas of the school district were represented. Wyoming also used a process to provide local advisory boards that report to the overall school board in cases where a community was considered to be somewhat isolated from the town or city where the school board met.

#### Recommendations

The following recommendations are presented as a result of the information presented in this thesis. Included will be recommendations for action by the State Legislature with respect to school district organization and recommendations for further studies that could be used to enhance the process of school district reorganization within the State.

Recommendations to the  
Legislature

Since each of the states studied used mandatory legislation to create successful reorganization action the Office of Public Instruction and the Montana State Legislature should draft mandatory reorganization legislation for the school districts of Montana. The legislation should establish a state level committee to oversee the process and county level committees to do the actual county wide planning. The legislation will also need to establish guidelines for the structure of reorganized districts and establish certain financial incentives for the reorganization. The legislation should provide for a three to five year time period for the county committees to develop acceptable plans. If a county failed to develop an acceptable plan in that time the state committee would be responsible for developing a plan for that county.

The state level committee should be chaired by the State Superintendent of Public Instruction with representation from the State Board of Education, the office of the Governor, and a representative designated by the Legislature. The duties of this committee should include providing leadership to the county committees by providing necessary forms, sample reorganization plans, and other statistics and information that will be helpful to the committees in planning reorganization of districts and in

convincing voters that the plan is viable and desirable. The committee will also be responsible for approving or disapproving the plan developed by each county committee. If a plan is disapproved, the committee will be responsible for providing suggestions for improvement of the plan when it is returned to the county committee.

The legislation to establish the county committees must be carefully crafted to insure that the representation on the committees reflects all areas of each county. Many states have successfully formed these committees by requiring a representative be appointed from each school district in the county. These representatives should be appointed by the school board of the districts involved. There must be a mechanism included for the county superintendent of schools to appoint a representative from any district that does not appoint someone by the required date just as there must be the authority for the State Superintendent or the state committee to appoint a committee in any county which has not formed one by the specified date. The legislation should also establish a time frame for the county committees to complete their work and present a plan to the state committee.

The legislation should establish guidelines for the structuring of the new districts in terms of desirable minimum size, curriculum offerings, tax base, and maximum time for pupils to be on a school bus traveling to and from

school. In a state as diversely populated as Montana the time that pupils would ride a bus or the existence of unacceptable road hazards that pupils might face if certain plans were implemented may be key factors to be considered in determining when schools must be consolidated or kept open. However, schools that are kept open because of these factors should still be governed as part of a larger reorganized school district.

The county committees need to have the authority to cooperate with the committees of adjoining counties to establish school districts that cross county lines when it is prudent and more efficient to do so. The committees need to be charged with holding public hearings in each district within the county to present the requirements of the law, to get input from the citizens and students, and to explain the plans that are developed. It was clearly demonstrated in other states that in counties where plans were successfully taken before the voters careful attention was given to involving the general public through hearings, presentations at club and civic group meetings, and by providing adequate information through the press.

The legislation should provide that once a plan has been developed and approved by the county committee it is sent to the state committee for approval. After approval by the state committee the plan will be subject to a vote by the people in the county. The legislation should provide

that a majority of votes within the area covered by any proposed district is sufficient to approve the creation of the new district. This prevents a group of voters in a very small district from blocking the reorganization plan by defeating it in that district alone.

The bonded indebtedness should stay with the old districts unless the voters in the new district choose at a later election to assume those debts as district wide debts. Similarly, if any buildings are sold the proceeds should first be credited to the indebtedness of the old districts in which the buildings were located if any exists.

The legislation should provide financial incentives to help offset some of the financial concerns that occur with reorganization of school districts. One incentive would be to guarantee the reorganized districts at least the same total amount of state funds for the new district, s foundation program that the individual districts would have received had they not reorganized. This should be set for a given period such as three or five years. Another incentive would be to establish state subsidies for the construction of new buildings that needed to be constructed as a result of the reorganization. These incentives would help to ameliorate some of the financial concerns that people have about reorganization.

Recommendations for Further Study

A study should be made of the most recent consolidations of districts that have occurred in Montana, such as the consolidations of Joplin and Inverness and of Rudyard and Hingham, to identify the strengths and weaknesses of the processes that were used. From this study, recommendations could be made to enhance the productivity of the county committees that should be established by school district reorganization legislation. The recommendations might include sample reorganization plans as well as procedures that might be used to help acquaint people with the advantages of reorganization. It would also provide some information about the financial aspects of reorganization in terms of total expenditures before and after reorganization occurred. It would also be instructive if measures of student satisfaction with the consolidations were also taken.

Studies should be made of the existing Montana schools ranging in sizes from 250 to 600 students relative to student satisfaction with school, their participation rates in extracurricular activities, and the availability of desired curriculum. Such studies would provide necessary information about the effects reorganization would have upon students since many of the districts that would be formed under comprehensive school district reorganization probably would have high schools in this size range.

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APPENDICES

APPENDIX A

LIST OF SCHOOLS CONSIDERED

Table 6

## Schools Considered

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Alberton	Lavina
Arlee	Manhattan
Augusta	Melstone
Bainville	Moore
Belfry	Nashua
Box Elder	Noxon
Brady	Outlook
Bridger	Park City
Broadview	Peerless
Brockton	Plevna
Charlo	Power
Clyde Park	Rapelje
Custer	Reedpoint
Denton	Richey
Dodson	Roberts
Dutton	Rosebud
Flaxville	Roy
Florence-Carlton	Ryegate
Frazer	Saco
Froid	Savage
Fromberg	Shepherd
Geraldine	Sheridan
Geyser	St. Ignatius

Table 6 (Continued)

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Grass Range	St. Regis
Harrison	Turner
Highwood	Victor
Hinsdale	Westby
Hobson	Whitewater
Joliet	Willow Creek
Judith Gap	Wilsall
Lambert	Winifred

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(Skarr, 1970, 131)

APPENDIX B  
CALCULATIONS

## Calculation of Sample Size Using the Cochran Formula

$$N = \frac{\frac{t^2 PQ}{d^2}}{1 + \left[ \frac{1}{N_p} \left( \frac{t^2 PQ}{d^2} - 1 \right) \right]}$$

Where t = confidence level

PQ = proportion of the population

d = error

Np = population size

N = sample size

$$N = \frac{\frac{(1.96)^2 (.5 \times .5)}{(.05)^2}}{1 + \left[ \frac{1}{21688} \left( \frac{(1.96)^2 (.5 \times .5)}{(.05)^2} - 1 \right) \right]}$$

$$N = \frac{\frac{(3.8416) (.25)}{(.0025)}}{1 + \left[ \frac{1}{21688} \left( \frac{(3.8416) (.25)}{(.0025)} - 1 \right) \right]}$$

$$N = \frac{384.16}{1 + \frac{383.16}{21688}}$$

$$N = \frac{384.16}{1.01767}$$

$$N = 377.49 \Rightarrow 378$$

## Calculations of subpopulation sample sizes

Subpopulation sample size =  $\frac{\text{Number in subpop.} \times \text{sample size}}{\text{Total population}}$

$$\text{Number of patrons} = \frac{17489 \times 378}{21688} = 304.8 \Rightarrow 305$$

$$\text{Number of students} = \frac{3501 \times 378}{21688} = 61$$

$$\text{Number of educators} = \frac{473 \times 378}{21688} = 8.2 \Rightarrow 8$$

$$\text{Number of elected officials} = \frac{225 \times 278}{21688} = 3.9 \Rightarrow 4$$

APPENDIX C

SURVEY

To: Survey recipients

From: Gary L. Webber

R.E.: Enclosed survey

For several years there have been discussions in the legislature of Montana concerning the advisability of forcing consolidation of school districts to eliminate many of the smaller schools in Montana. As the superintendent of one of these smaller school systems I am aware of many of the strengths and weaknesses of these systems. As part of my dissertation for my work under Dr. Robert Thibeault at Montana State University I am developing a booklet that will provide legislators, educators, and other interested persons a brief history of Montana school districts and information about the attitudes towards school district consolidation of people and students who live in the school districts that might be eliminated by consolidation.

Legislators and state education leaders need to know how the people in districts with small schools feel about the possibility of state mandated programs designed to accelerate the consolidation of school districts. They need to know the strengths as well as the weaknesses of these schools. In order to provide meaningful guidance to those people who propose bills to the legislature designed to promote consolidation I must have your responses to the questions in the enclosed survey. In order to provide necessary information to state decision makers I need your responses as soon as possible. I must have nearly all of the surveys returned for the study to be accepted by the people to whom the results will be addressed. Please answer the questions and return the survey to me in the enclosed postage paid envelope.

Your answers will be kept confidential. Data from the survey will be presented in summary form and not as answers from individuals. The envelope has a code number so that I can determine which surveys have not been returned so that I can send follow up requests to those who have not returned the surveys.

It is not necessary to give a great deal of thought to your answers. It is best to read the statement and put down the response that first comes to mind.

Thank you for your help.

For each of the following statements circle 1 if you strongly agree with it, 2 if you agree with it, 3 if you disagree with it, and 4 if you strongly disagree with it. The terms "consolidated district", "combined districts", and "larger school" as used all refer to the results of consolidating school districts.

1. School taxes in a consolidated district would be higher than if consolidation did not occur. 1 2 3 4
2. The school board in a combined district will be less responsive to the concerns of the individual taxpayer in the district. 1 2 3 4
3. Better administrators could be hired in a school district if smaller districts were combined into one larger district. 1 2 3 4
4. Better teachers could be hired by a larger district formed by combining smaller districts. 1 2 3 4
5. Schools should be consolidated if tax money can be used more efficiently. 1 2 3 4
6. Students in a larger school would get a program better tailored to their individual needs. 1 2 3 4
7. Students in a larger school would get better counseling and guidance services. 1 2 3 4
8. Students in a larger school would have more opportunities to participate in a variety of extracurricular activities. 1 2 3 4
9. A larger school would provide a better variety of library books and magazines for student use. 1 2 3 4
10. Taxes to support schools would be fairer if districts were combined because tax rates would be equalized over larger areas. 1 2 3 4
11. Students graduating from a larger school would be better prepared for college. 1 2 3 4
12. Students graduating from a larger school would be better prepared for the personal and social needs of adult life. 1 2 3 4
13. Students graduating from a larger school would be better prepared for the job market. 1 2 3 4

14. Students attending a larger school would have a better chance to take advanced level classes than they presently do. 1 2 3 4
15. Taxpayers in a local district should have the option to vote about whether or not to help pay for school buildings that were built by other districts before consolidation that would be used by students from all parts of the district. 1 2 3 4
16. The state should provide higher levels of support to the budget for schools that consolidate to encourage schools to consolidate with other districts. 1 2 3 4
17. If schools are to be consolidated the planning should be done at the county level by a committee of representatives of all school districts in the county. 1 2 3 4
18. School boards should be able to consolidate school districts without having a vote of the people in the districts. 1 2 3 4
19. A majority vote of the people in the area of the proposed consolidated district should be sufficient to consolidate the districts. 1 2 3 4
20. Only school districts that operate a high school should be allowed to exist. 1 2 3 4
21. School districts should only be drawn up along county lines. 1 2 3 4
22. School district boundaries should be drawn up around natural trade areas without regard for county lines. 1 2 3 4
23. School district consolidation should be encouraged to give students a larger variety of classes to take. 1 2 3 4
24. A county wide school board with one superintendent should direct all schools in a county. 1 2 3 4
25. The school board of a combined district would provide less local control of schools. 1 2 3 4

- |   |         |
|---|---------|
| 26. Less populous areas would lose control over the education of their children in a combined district.   | 1 2 3 4 |
| 27. Total transportation costs would be much greater if school districts were combined into one larger district.  | 1 2 3 4 |
| 28. The vitality of the community would suffer if the local school district was consolidated with a neighboring district.                                       | 1 2 3 4 |
| 29. Fewer students could participate in extra-curricular activities if schools were consolidated.   | 1 2 3 4 |
| 30. The people of the community would have fewer events to attend if the school district consolidated into a larger one.  | 1 2 3 4 |
| 31. The community would lose its sense of identity without high school sports teams bearing its name.   | 1 2 3 4 |
| 32. Parents would lose contact with their children's teachers if the schools were consolidated.   | 1 2 3 4 |
| 33. Our local school might be closed if the local district consolidated with a neighboring district.  | 1 2 3 4 |
| 34. Parents would lose access to the district level administrators if schools were consolidated.  | 1 2 3 4 |
| 35. Consolidation of school districts would require new buildings which would be very expensive.  | 1 2 3 4 |
| 36. Consolidating school districts would create a slow acting, unresponsive bureaucracy.  | 1 2 3 4 |
| 37. Students would lose their individual identities in larger schools created by consolidation.   | 1 2 3 4 |
| 38. Our local district has a very good program in a subject area that is important to the community that might not be done as well if schools are consolidated. | 1 2 3 4 |

39. If our local district were to consolidate with a neighboring district our local people would not have adequate input because the neighboring district would take control of the new district. 1 2 3 4
40. Consolidation of school districts is not needed. 1 2 3 4
41. Consolidating schools will cause students to have to spend too much time riding a bus. 1 2 3 4
42. Students in a larger school would not be as happy as they are in the local schools. 1 2 3 4
43. The local school is the community center for the town and the buildings would not be as accessible for community use if the schools were consolidated. 1 2 3 4
44. Only expensive programs such as vocational agriculture or home economics should be consolidated rather than whole schools. 1 2 3 4
45. The state should provide more help designed to improve small schools rather than encourage consolidation. 1 2 3 4
46. School consolidation would provide for better public use of local school facilities. 1 2 3 4
47. Student discipline would be better in a larger school. 1 2 3 4
48. Students would be treated more fairly in a larger school. 1 2 3 4
49. I am aware that students have recommended major consolidation of Montana school districts including the one in which I live. 1 2 3 4
50. The reduction of the number of school districts in Montana by consolidation is desirable. 1 2 3 4
51. The district in which I live should be consolidated with a neighboring district. 1 2 3 4
52. If school districts are going to be forced to consolidate it should be coordinated at the state level. 1 2 3 4

53. Each county except for very populous counties should have only one or two high schools in it unless there are some extreme transportation problems. 1 2 3 4
54. Some students would spend an unreasonable amount of time riding a school bus to reach school if school districts were consolidated. 1 2 3 4
55. Students get better discipline in local schools than they would in a larger school. 1 2 3 4
56. The state legislature should exercise its power to force school districts to consolidate. 1 2 3 4
57. Students would not be treated as fairly in a larger school as they are in the local school. 1 2 3 4
58. Any school district consolidation that occurs should be voluntary and not mandated by the state. 1 2 3 4
59. The state should provide substantial bonus payments to districts to encourage more districts to consolidate. 1 2 3 4
60. School district administrators should take the lead in suggesting that districts consolidate with neighboring districts. 1 2 3 4
61. To encourage districts to consolidate the state should penalize small schools by providing less state support to them than it currently does. 1 2 3 4
62. The current method of state financial support for schools encourages small schools to stay open and not consider consolidation with a neighboring school. 1 2 3 4
63. A majority vote of the people in each of the districts proposed for consolidation should be required before consolidation can occur. 1 2 3 4
64. the people of a community would have more events to attend if the school districts consolidated into a larger one. 1 2 3 4
65. Students could be transported to school more efficiently if schools were consolidated into a larger district. 1 2 3 4

66. Montana does not need to reduce the number of school districts in the state. 1 2 3 4
67. School district consolidation would prevent the need for new buildings by using existing buildings more efficiently. 1 2 3 4
68. Students would be happier in large schools created by consolidation. 1 2 3 4
69. If school districts are consolidated a school building in each community should be kept in use as a school. 1 2 3 4
70. Small local schools should be kept even if they use money less efficiently than a larger one. 1 2 3 4

APPENDIX D

TABULATIONS OF SURVEY RESPONSES

Table 7

Responses from Parents and Patrons to Survey Questions.  
(N = 247)

Q./R.	1	2	3	4	Q./R.	1	2	3	4
1	41	60	96	50	36	23	50	147	27
2	55	64	78	50	37	33	79	121	14
3	64	64	78	41	38	27	78	128	14
4	45	69	96	37	39	23	64	119	41
5	69	96	64	18	40	41	37	82	87
6	41	101	96	9	41	60	73	82	32
7	41	64	101	41	42	37	70	103	37
8	37	87	73	50	43	46	73	110	18
9	64	133	37	13	44	8	32	92	115
10	37	119	82	9	45	55	78	82	32
11	22	46	133	46	46	13	60	133	41
12	22	46	133	46	47	4	32	151	60
13	18	61	121	47	48	27	27	147	46
14	92	128	23	4	49	60	92	64	31
15	69	92	64	22	50	37	87	92	31
16	37	45	115	50	51	36	60	82	69
17	105	110	32	0	52	40	60	46	101
18	10	14	47	176	53	22	119	60	46
19	60	105	46	36	54	64	87	69	27
20	0	27	119	101	55	50	78	87	32
21	9	55	128	55	56	32	50	78	87

Table 7 (Continued)

Q./R.	1	2	3	4	Q./R.	1	2	3	4
22	23	69	128	27	57	23	50	147	27
23	45	90	67	45	58	73	124	46	4
24	23	50	87	87	59	18	115	87	27
25	32	105	101	9	60	27	96	78	46
26	38	107	83	19	61	13	37	69	128
27	73	73	87	14	62	36	124	78	9
28	78	115	50	4	63	92	105	41	9
29	60	70	103	14	64	37	64	119	27
30	32	60	137	18	65	9	82	101	55
31	46	110	73	18	66	46	41	110	50
32	17	60	124	46	67	14	98	103	32
33	64	119	46	18	68	9	41	147	50
34	18	46	156	27	69	23	87	105	32
35	41	106	73	27	70	36	64	110	37

Table 8

Weighted Responses from Table 7.

Q./R.	1	2	3	4	Q./R.	1	2	3	4
1	-42	-60	96	100	36	-46	-100	147	54
2	-110	-64	78	100	37	-66	-79	121	28
3	128	64	-78	-82	38	54	78	-128	-28
4	90	69	-96	-74	39	46	64	-119	-82
5	138	96	-64	-36	40	82	37	-82	-174
6	82	101	-96	-18	41	120	73	-82	-64
7	82	64	-101	-82	42	74	70	-103	-74
8	128	133	-37	-26	43	92	73	-110	-36
9	44	46	-133	-92	44	16	32	-92	-230
10	74	119	-82	-18	45	-110	-78	82	64
11	74	87	-73	-100	46	26	60	-133	-82
12	44	45	-133	-92	47	-8	-32	151	120
13	36	61	-121	-94	48	-54	-27	147	92
14	184	128	-23	-8	49	120	92	-64	-62
15	138	92	-64	-44	50	-74	-87	92	62
16	74	45	-115	-100	51	-72	-60	82	138
17	210	110	-32	-20	52	80	60	-46	-202
18	0	-14	47	252	53	44	119	-60	-92
19	120	105	-46	-72	54	128	87	-69	-54
20	0	27	-119	-202	55	100	78	-87	-64
21	18	55	-128	-110	56	64	50	-78	-174
22	46	69	-128	-54	57	46	50	-147	-54

Table 8 (Continued)

Q./R.	1	2	3	4	Q./R.	1	2	3	4
23	90	70	-67	-90	58	146	124	-46	-8
24	46	50	-87	-174	59	36	115	-87	-54
25	64	105	-101	-18	60	54	96	-78	-92
26	76	107	-83	-38	61	26	37	-69	-256
27	-146	-73	87	28	62	72	124	-78	-18
28	156	115	-50	-8	63	184	105	-41	-18
29	120	70	-103	-28	64	-74	-64	119	54
30	64	60	-137	-36	65	18	82	-101	-110
31	92	110	-73	-36	66	-92	-41	110	100
32	34	60	-121	-92	67	28	98	-103	-64
33	128	119	-46	-36	68	-18	-41	147	100
34	36	46	-156	-54	69	46	87	-105	-64
35	-82	-106	73	54	70	-72	-64	110	74

Table 9

Responses of Students to Questions on Survey. (N=55)

Q./R.	1	2	3	4	Q./R.	1	2	3	4
1	0	28	23	4	36	6	28	21	0
2	13	26	12	4	37	23	19	10	3
3	8	19	18	10	38	15	26	12	2
4	9	19	17	10	39	9	24	18	4
5	9	23	19	4	40	25	14	12	4
6	7	11	23	14	41	19	24	10	2
7	3	10	23	19	42	15	19	18	3
8	7	23	11	14	43	13	26	15	1
9	18	29	8	0	44	3	13	21	18
10	2	31	20	2	45	22	23	9	1
11	5	23	18	9	46	2	14	31	8
12	1	10	31	13	47	0	5	25	25
13	1	18	27	9	48	4	8	24	19
14	13	29	10	3	49	11	29	11	4
15	6	34	13	2	50	3	18	21	13
16	6	20	23	6	51	4	9	16	26
17	16	30	8	1	52	7	22	19	7
18	2	0	14	39	53	2	18	18	17
19	1	30	19	5	54	19	25	9	2
20	2	16	21	16	55	22	23	10	0
21	2	14	25	14	56	5	6	25	19
22	4	23	23	5	57	16	17	21	1

Table 9 (Continued)

Q./R.	1	2	3	4	Q./R.	1	2	3	4
23	13	28	11	3	58	24	18	11	2
24	0	6	30	19	59	4	19	21	11
25	7	34	14	0	60	4	23	26	2
26	8	26	19	2	61	0	4	18	33
27	21	24	9	1	62	6	25	23	1
28	13	23	19	0	63	25	25	5	0
29	21	23	10	1	64	3	25	22	5
30	5	20	22	8	65	2	13	25	15
31	18	24	9	4	66	14	22	14	5
32	13	23	16	3	67	3	16	22	14
33	14	31	6	4	68	3	6	20	26
34	12	28	15	0	69	6	28	18	3
35	21	28	5	1	70	12	22	18	3

Table 10

Weighted Responses from Table 9.

Q./R.	1	2	3	4	Q./R.	1	2	3	4
1	0	-28	23	8	36	12	28	-21	0
2	-26	-26	12	8	37	-46	-19	10	6
3	16	19	-18	-20	38	30	26	-12	-4
4	18	19	-17	-20	39	18	24	-18	-8
5	18	23	-19	-8	40	50	14	-12	-8
6	14	11	-23	-28	41	38	24	-10	-4
7	6	10	-23	-38	42	30	19	-18	-6
8	14	23	-11	-28	43	26	26	-15	-2
9	36	29	-8	0	44	6	13	-21	-36
10	4	31	-20	-4	45	-44	-23	9	1
11	10	23	-18	-18	46	4	14	-31	-16
12	2	10	-31	-26	47	0	-5	25	50
13	2	18	-27	-18	48	-8	-8	24	38
14	26	29	-10	-6	49	22	29	-11	-8
15	12	34	-13	-4	50	-6	-18	21	26
16	12	20	-23	-12	51	-8	-9	16	52
17	32	30	-8	-2	52	14	22	-19	-14
18	-4	0	14	78	53	4	18	-18	-34
19	2	30	-19	-10	54	38	25	-9	-4
20	4	16	-21	-32	55	44	23	-10	0
21	4	14	-25	-28	56	10	6	-25	-38
22	8	23	-23	-10	57	32	17	-21	-2

Table 10 (Continued)

Q./R.	1	2	3	4	Q./R.	1	2	3	4
23	26	28	-11	-6	58	48	18	-11	-4
24	0	6	-30	-38	59	8	38	-21	-22
25	14	34	-14	0	60	8	23	-26	-4
26	16	26	-19	-4	61	0	4	-18	-66
27	-42	-24	9	2	62	12	25	-23	-2
28	26	23	-19	0	63	50	25	-5	0
29	42	23	-10	-2	64	-6	-25	22	10
30	10	20	-22	-16	65	4	13	-25	-30
31	36	24	-9	-8	66	-28	-22	14	10
32	26	23	-16	-6	67	6	16	-22	-28
33	28	31	-6	-8	68	-6	-6	20	52
34	24	28	-15	0	69	12	28	-18	-6
35	-42	-28	5	2	70	-24	-22	18	6

Table 11

Responses of Educators to Questions on Survey. (N=7)

Q./R.	1	2	3	4	Q./R.	1	2	3	4
1	0	2	3	2	36	0	2	3	2
2	1	2	1	3	37	1	2	3	1
3	2	1	3	1	38	3	1	3	0
4	1	2	2	2	39	2	1	2	2
5	3	2	2	0	40	1	1	4	1
6	2	2	2	1	41	2	1	3	1
7	0	4	1	2	42	1	2	3	1
8	1	3	1	2	43	0	4	3	0
9	1	3	3	0	44	0	0	5	2
10	3	3	1	0	45	2	3	2	0
11	0	1	4	2	46	0	2	4	1
12	0	1	3	3	47	0	0	6	1
13	0	0	5	2	48	0	0	6	1
14	3	3	1	0	49	2	4	1	0
15	2	4	1	0	50	1	4	1	1
16	1	4	1	1	51	1	1	3	2
17	2	3	2	0	52	1	3	1	2
18	0	0	1	6	53	0	2	4	1
19	1	3	3	0	54	2	2	3	0
20	0	0	2	5	55	2	1	3	1
21	0	0	4	3	56	0	1	5	1
22	2	2	2	1	57	1	2	2	2

Table 11 (Continued)

Q./R.	1	2	3	4	Q./R.	1	2	3	4
23	1	4	1	1	58	2	3	2	0
24	1	2	1	3	59	1	3	3	0
25	0	3	4	0	60	1	1	5	0
26	0	5	2	0	61	0	2	3	2
27	2	2	3	0	62	0	3	3	1
28	2	1	4	0	63	2	5	0	0
29	1	3	2	1	64	1	3	3	0
30	0	3	3	1	65	0	2	5	0
31	2	1	2	2	66	1	1	4	1
32	1	2	1	3	67	0	3	4	0
33	0	5	2	0	68	0	2	4	1
34	0	3	3	1	69	1	3	2	1
35	1	4	2	0	70	1	3	2	1

Table 12

Total Responses from Table 11.

Q./R.	1	2	3	4	Q./R.	1	2	3	4
1	0	-2	3	6	36	0	2	-3	-4
2	-2	-2	1	6	37	-2	-2	3	2
3	6	1	-3	-2	38	6	1	-3	0
4	2	2	-2	-4	39	4	1	-2	-4
5	6	2	-2	0	40	2	1	-4	-2
6	4	2	-2	-2	41	4	1	-3	-2
7	0	4	-1	-4	42	2	2	-3	-2
8	2	3	-1	-4	43	0	4	-3	0
9	2	3	-3	0	44	0	0	-5	-4
10	6	3	-1	0	45	-4	-3	2	0
11	0	1	-4	-4	46	0	2	-4	-2
12	0	1	-3	-6	47	0	0	6	2
13	0	1	-5	-4	48	0	0	6	2
14	6	3	-1	0	49	4	2	-1	0
15	4	4	-1	0	50	-2	-4	1	2
16	2	4	-1	-2	51	-2	-1	3	4
17	4	4	-2	0	52	2	3	-1	-4
18	0	0	1	12	53	0	2	-4	-2
19	2	3	-3	0	54	4	2	-3	0
20	0	0	-2	-10	55	4	1	-3	-2
21	0	0	-4	-6	56	0	1	-5	-2
22	4	2	-2	-2	57	2	2	-2	-4

Table 12 (Continued)

Q./R.	1	2	3	4	Q./R.	1	2	3	4
23	2	4	-1	-2	58	4	3	-2	0
24	2	2	-1	-6	59	2	3	-3	0
25	0	3	-4	0	60	2	1	-5	0
26	0	5	-2	0	61	0	2	-3	-4
27	-4	-2	3	0	62	0	3	-3	-2
28	4	1	-4	0	63	4	5	0	0
29	2	3	-2	-2	64	-2	-3	3	0
30	0	3	-3	-2	65	0	2	-5	0
31	4	1	-2	-4	66	-2	-1	4	2
32	2	2	-1	-6	67	0	3	-4	0
33	0	5	-2	0	68	0	-2	4	2
34	0	3	-3	-2	69	2	3	-2	-2
35	-2	-4	2	0	70	-2	-3	2	2

Table 13

Responses of Elected Officials to Questions on Survey. (N=4)

Q./R.	1	2	3	4	Q./R.	1	2	3	4
1	0	1	3	0	36	0	2	0	2
2	1	1	2	0	37	1	1	1	1
3	0	2	2	0	38	0	1	3	0
4	0	1	2	1	39	0	1	1	2
5	1	1	2	0	40	0	0	2	2
6	0	3	1	0	41	1	0	2	1
7	0	1	2	1	42	1	0	1	2
8	0	2	1	1	43	0	0	3	1
9	0	4	0	0	44	0	0	1	3
10	0	3	1	0	45	1	1	1	1
11	0	1	2	1	46	0	2	2	0
12	0	1	3	0	47	0	0	3	1
13	0	0	4	0	48	0	0	3	1
14	2	2	0	0	49	0	2	2	0
15	2	1	1	0	50	0	3	1	0
16	1	0	3	0	51	1	2	1	0
17	4	0	0	0	52	0	1	3	0
18	0	0	0	4	53	0	3	0	1
19	1	1	1	1	54	2	0	1	1
20	0	0	0	4	55	2	0	1	1
21	0	0	1	3	56	0	1	1	2
22	0	1	1	2	57	0	1	3	0

Table 13 (Continued)

Q./R.	1	2	3	4	Q./R.	1	2	3	4
23	0	3	0	1	58	1	2	1	0
24	2	0	2	0	59	1	2	1	0
25	1	1	2	0	60	0	1	3	0
26	1	1	2	0	61	1	0	1	2
27	1	1	1	1	62	1	2	1	0
28	2	1	0	1	63	1	3	0	0
29	2	0	1	1	64	1	1	1	1
30	1	0	2	1	65	0	2	1	1
31	1	0	2	1	66	0	0	3	1
32	0	2	0	2	67	0	1	2	1
33	1	3	0	0	68	0	1	2	1
34	0	1	1	2	69	1	1	2	0
35	0	1	1	2	70	1	1	1	1

Table 14

Weighted Responses from Table 13.

Q./R.	1	2	3	4	Q./R.	1	2	3	4
1	0	-1	3	0	36	0	2	0	-4
2	-2	-1	2	0	37	-2	-1	1	2
3	0	2	-2	0	38	0	1	-3	0
4	0	1	-2	-2	39	0	1	-1	-4
5	2	1	-2	0	40	0	0	-2	-4
6	0	3	-1	0	41	2	0	-2	-2
7	0	1	-2	-2	42	2	0	-1	-4
8	0	2	-1	-2	43	0	0	-3	-2
9	0	4	0	0	44	0	0	-1	-6
10	0	3	-1	0	45	-2	-1	1	2
11	0	1	-2	-2	46	0	2	-2	0
12	0	1	-3	0	47	0	0	3	2
13	0	0	-4	0	48	0	0	3	2
14	4	2	0	0	49	0	2	-2	0
15	4	1	-1	0	50	0	-3	1	0
16	2	0	-3	0	51	-2	-2	1	0
17	8	0	0	0	52	0	1	-3	0
18	0	0	0	8	53	0	3	0	-2
19	2	1	-1	-2	54	4	0	-1	-2
20	0	0	0	-8	55	4	0	-1	-2
21	0	0	-1	-6	56	0	1	-1	-4
22	0	1	-1	-4	57	0	1	-3	0

Table 14 (Continued)

Q./R.	1	2	3	4	Q./R.	1	2	3	4
23	0	3	0	-2	58	2	2	-1	0
24	4	0	-2	0	59	2	2	-1	0
25	2	1	-2	0	60	0	1	-3	0
26	2	1	-2	0	61	2	0	-1	-4
27	-2	-1	1	2	62	2	2	-1	0
28	4	1	0	-2	63	2	3	0	0
29	4	0	-1	-2	64	-2	-1	1	2
30	2	0	-2	-2	65	0	2	-1	-2
31	2	0	-2	-2	66	0	0	3	2
32	0	2	0	-4	67	0	1	-2	-2
33	2	3	0	0	68	0	-1	2	2
34	0	1	-1	-4	69	2	1	-2	0
35	0	-1	1	4	70	-2	-1	1	2

Table 15

Total Responses from All Surveys (N=313).

Q./R.	1	2	3	4	Q./R.	1	2	3	4
1	41	91	125	56	36	29	82	171	31
2	70	93	93	57	37	58	101	135	19
3	74	86	101	52	38	45	106	146	16
4	55	91	117	50	39	34	90	140	49
5	82	122	87	22	40	67	52	100	94
6	50	117	122	24	41	82	98	97	36
7	44	79	127	63	42	54	91	125	43
8	45	115	86	67	43	59	103	131	20
9	83	169	48	13	44	11	45	119	138
10	42	156	104	11	45	80	105	94	34
11	27	71	157	58	46	15	78	170	50
12	23	58	170	62	47	4	37	185	87
13	19	79	157	58	48	31	35	180	67
14	110	162	34	7	49	73	127	78	35
15	79	131	79	24	50	41	112	115	45
16	45	69	142	57	51	42	72	102	97
17	127	143	42	1	52	48	86	69	110
18	12	14	62	225	53	24	142	82	65
19	63	139	69	42	54	87	114	82	30
20	2	43	142	126	55	76	102	101	34
21	11	69	158	75	56	37	58	109	109
22	29	95	152	35	57	40	70	173	30

Table 15 (Continued)

Q./R.	1	2	3	4	Q./R.	1	2	3	4
23	59	125	79	50	58	100	147	60	6
24	26	58	120	109	59	24	139	112	38
25	40	143	121	9	60	32	121	112	48
26	47	139	106	21	61	14	43	91	165
27	97	100	100	16	62	43	154	105	11
28	95	140	73	5	63	120	138	46	9
29	84	96	116	17	64	42	93	145	33
30	38	83	164	28	65	11	99	132	71
31	67	135	86	25	66	61	64	131	57
32	31	87	141	54	67	17	118	131	47
33	79	158	54	22	68	12	50	173	78
34	30	78	175	30	69	31	119	127	36
35	63	139	81	30	70	50	90	131	42

Table 16

Weighted Totals from Table 15.

Q./R.	1	2	3	4	Q./R.	1	2	3	4
1	-82	-91	125	112	36	58	82	-171	-62
2	140	93	-93	-114	37	-116	-101	135	38
3	148	86	-101	-104	38	90	106	-146	-32
4	110	91	-117	-100	39	68	90	-140	-98
5	164	122	-87	-44	40	134	52	-100	-188
6	100	117	-122	-48	41	164	98	-97	-72
7	88	79	-127	-126	42	108	91	-125	-86
8	90	115	-86	-134	43	118	103	-131	-40
9	166	169	-48	-26	44	22	45	-119	-276
10	84	156	-104	-22	45	-160	-105	94	68
11	54	71	-157	-116	46	30	78	-170	-100
12	46	58	-170	-124	47	-8	-37	185	174
13	38	79	-157	-116	48	-62	-35	180	134
14	220	162	-34	-14	49	146	127	-78	-70
15	158	131	-79	-48	50	-82	-112	115	90
16	90	69	-142	-104	51	-84	-72	102	194
17	-254	-143	42	2	52	96	86	-69	-220
18	-24	-14	62	450	53	48	142	-82	-130
19	126	139	-69	-84	54	174	114	-82	-60
20	4	43	-142	-252	55	-152	-102	101	68
21	22	69	-158	-150	56	74	58	-109	-218
22	58	95	-152	-70	57	80	70	-173	-60

Table 16 (Continued)

Q./R.	1	2	3	4	Q./R.	1	2	3	4
23	118	125	-79	-100	58	-200	-147	60	12
24	52	58	-120	-218	59	48	139	-112	-76
25	80	143	-121	-18	60	64	121	-112	-96
26	94	139	-106	-42	61	28	43	-91	-330
27	-194	-100	100	32	62	86	154	-105	-22
28	190	40	-73	-10	63	240	138	-46	-18
29	168	96	-116	-34	64	-84	-93	145	66
30	76	83	-164	-56	65	22	99	-132	-142
31	134	135	-86	-50	66	-122	-64	131	114
32	62	87	-141	-108	67	34	118	-131	-94
33	158	158	-54	-44	68	-24	-50	173	156
34	60	78	-175	-60	69	62	119	-127	-72
35	-126	-139	81	60	70	-100	-90	131	84

APPENDIX E

QUESTION TO STATEMENT MATCH-UP

Table 17

## General Statements to Questionnaire Match-up

General Statement	Questions
1. Consolidation would decrease taxes.	1,27,35
2. Consolidation would decrease local control.	2,25,26,38,39
3. Consolidation would improve the school staff.	3,4
4. Consolidation would provide broader curriculum.	8,9,11,14,23
5. Consolidation would provide better service to individuals.	6,7,12,13,37
6. Consolidation would make taxes more equitable.	10
7. Voters should control redistricting.	15,17,18,19,58 63
8. The State should encourage consolidation.	16,45,52,56,59
9. District structure should be set by the state.	20,21,22,24,53
10. Consolidation would adversely impact the town.	28,30,31,33,43 64
11. Consolidation would lessen parent contact with the schools.	32,34,36
12. Consolidation is unnecessary change.	40,50,51
13. Consolidation would adversely affect the students.	29,41,42,47 54,55,57,68
14. I am aware of a need for consolidation.	49,66
15. Change is needed in the way the state finances small schools.	61,62

Table 17 (Continued)

General Statement	Questions
16. Consolidation would provide for more efficient expenditures.	5,46,65,67,70
17. Consolidation should be limited in scope.	44,69
18. School district administrators should promote consolidation.	60

Table 18

## Retarding Factor to General Statement Match-up

Retarding Factor	General Statement
1. Taxes would be adversely affected and financial efficiency lost.	1,6,16
2. Local control would be lost.	2,8,9
3. Negative impact upon students	5,13
4. Negative impact upon town	10
5. Loss of desirable programs and staff	3,4
6. Loss of parent contact with teachers	11

Table 19

## Attitude Factor to General Statement Match-up

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General Attitude Factors	General Statement
1. Unnecessary change	12
2. Awareness of stated need for consolidation	14
3. School administrators should advocate consolidation.	18
4. Change is needed in finance system	15
5. Voters should control consolidation	7
6. Consolidation scope should be limited	17

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APPENDIX F

HANDBOOK

SCHOOL DISTRICT REORGANIZATION

A handbook of school district reorganization produced as part of a doctoral dissertation at Montana State University.

by

Gary L. Webber

### INTRODUCTION

This handbook was produced as a part of my dissertation titled Factors Inhibiting Montana School District Reorganization. It was produced to provide information to those people and organizations interested in the structure of Montana school districts and to provide them with information needed to obtain the most desirable district structure within the state.

This handbook will identify some of the factors which have inhibited school district reorganization within the state. It will further attempt to identify how these factors were addressed in the reorganization of school districts in neighboring states. It will also provide suggestions relative to school district reorganization procedures for the State of Montana.

### HISTORICAL NOTE

By 1932 the United States had 127,649 school districts (Burrup, 1977:89). States found that the large numbers of school districts created problems in coordinating the functions of education and made the equalization of financial support for schools from local taxpayers difficult to achieve (Fitzwater, 1958:3). By 1980 the number had been reduced to 15,987 (Education Commission of the States,

1981:3). State legislatures have moved to alleviate the problem of too many school districts by passing either permissive or mandatory legislation. Some reorganization legislation has provided for the existing state department of education to direct the reorganization processes while other states have passed legislation in which a new state level agency was created to oversee and direct the reorganization of school districts (Fitzwater,1958). Montana, with its permissive legislation, has shown a very gradual reduction in the number of operating districts (Skarr,1970).

Accelerated reorganization of school districts within Montana has been recommended in two statewide studies, in doctoral dissertations at Montana State University and the University of Montana, and in several master's thesis (Public Schools of Montana,1958; Montana Report,1960; Barnett,1974; Anderson,1970; Hilton, 1966; Skarr,1970).

Two reasons given for statewide reorganization were:

1. A need to eliminate areas under the control of a high school board and a separate elementary board.
2. A need to eliminate excessively small districts (Public Schools of Montana, 1958:62).

Anderson (1970:34), in his master's thesis, suggested that the consolidation of certain districts would lead to more efficient use of available resources.

Mattocks (1972: 57-8) found per pupil costs to be excessive in some of the smaller districts that he studied. Each of these districts was adjacent to a larger district. Barnett (1974:149) concluded that improved educational programs and increased opportunities for students could be accomplished by reorganizing the districts in his study area. In 1958 and 1960 the results of two major statewide studies of Montana schools were released. Each study contained recommendations for restructuring the school districts of Montana (Public Schools of Montana, 1958; Montana Report, 1960). A doctoral dissertation, which Skarr did at the University of Montana in 1970, resulted in recommendations for restructuring the high school districts within the state. No major changes were made in Montana school district organization as a result of these studies. Recognition by legislators that school problems are reaching an acute state led to the appointment of an interim legislative committee of the Montana state legislature during the 1981 session. The charge to this committee was to consider the problems of educational finance and other school related problems and to seek possible solutions (Montana State Legislature, 1981). Since efficiently organized school districts are among the best safeguards against unwise expenditures and inefficient management Montana's school district structure needs to be carefully examined to see what improvements in operational management

and/or educational opportunity could be created by reorganization of those districts.

### Reorganization Legislation

There are three basic types of school district reorganization legislation - permissive, semi-mandatory, and mandatory. Permissive legislation allows districts to consolidate if the residents of the districts desire to do so within the confines of the statute. Mandatory legislation requires that districts reorganize to meet the requirements established by the statute. The legislation normally specifies what agencies are to coordinate the process or creates a new agency to do so.

Most states have or have had some form of permissive legislation but large scale reorganization has occurred where it has been forced by semi-mandatory or mandatory legislation.

Montana has had permissive legislation since 1895. Montana's current permissive legislation has allowed for some redistricting but not nearly as much as has been recommended by various reports and studies. The current statute provides for \$500 per ANB of the smaller district for a period of three years in incentive payments.

### The Study

The problem addressed by this study was twofold. The

first was to determine the primary factors that have inhibited school district reorganization in Montana. The second was to examine the reorganization processes used by neighboring states to determine how those inhibiting factors were dealt with in the reorganization plans in those states.

This study attempted to answer the questions:

1. What factors have inhibited school district organization in Montana?
2. How have neighboring states addressed those factors in their school district reorganization plans?

The first problem was addressed by the use of a survey of randomly selected students, administrators, and patrons of school districts. The districts selected were those districts that were recommended for closure in Dr. Skaar's dissertation (Skaar, 1970).

The second problem was addressed by a survey of the literature from and about the neighboring states that have reorganized their school districts.

The study was limited in scope and examined the reorganization legislation and procedures for the states of Washington, Idaho, Wyoming, Colorado, North Dakota, and South Dakota. The attitudes of people within Montana relative to reorganization of school districts was assessed only for the districts selected to be surveyed.

### Results

The four identified areas of concern which produced

adverse effects on consolidation were:

1. Consolidation would adversely impact the town.
2. Consolidation would adversely impact the students.
3. Consolidation would result in less efficient expenditures and increased costs.
4. Consolidation would decrease local control.

The concern that consolidation would adversely affect the town by providing fewer opportunities to participate in and enjoy school events and to limit the use of the facilities by people of the community was by far the strongest held opinion as expressed in the answers to the survey. The questions relating to this concern in the survey dealt with items related to the loss of "our school" and "our team". These indicate the perception that if schools are consolidated the vitality of the community would suffer.

Concern for the adverse impact upon students was expressed as a feeling that students would lose their identities as individuals and would not receive the individual attention and guidance that they receive in their smaller schools and that they would be subject to longer, tedious bus rides. The respondents to the survey did not feel that the students in a consolidated school would receive fairer discipline or a better preparation for; college or for work although they did indicate that a wider variety of courses and supplementary materials would be

available in the larger school.

An impression that consolidation would increase costs was indicated in the fear that increased transportation costs and costs for additional buildings that might be needed would exceed any other savings and result in an overall increase in costs. It was also expressed that existing buildings might not be used efficiently after reorganization.

The feeling that local control would be lost showed as a negative indicator for consolidation although it was not perceived as strongly as the others presented.

Other topics in the survey showed a general awareness of the reported need for reorganization of school districts and that the reorganization of school districts would provide the students with a greater variety of course offering, a wider variety of library and counseling services, and a wider variety of extracurricular activities. This awareness provides a basis for establishing successful reorganization programs within the counties of the state.

#### Recommendations

The Office of Public Instruction and the Montana State Legislature need to draft mandatory or semi-mandatory reorganization legislation for the school districts of Montana. The legislation should establish a state level committee to oversee the process and county level committees

to do the actual county wide planning. The legislation will also need to establish guidelines for the structure of reorganized districts and establish certain financial incentive for the reorganization. It should also repeal all current laws dealing with the reorganization of school districts and replace them with one comprehensive law.

The state level committee should be chaired by the State Superintendent of Public Instruction with representation from the State Board of Education, the office of the Governor, and a representative designated by the Legislature as well as other organizations in the state that currently exist that represent various types of educators and concerned parents. The duties of this committee should include providing leadership to the county committees by providing necessary forms, sample reorganization plans, and other statistics and information that will be helpful to the committees in planning reorganization of districts and in convincing voters that the plan is viable and desirable. The committee will also be responsible for approving or disapproving the plan developed by each county committee. If a plan is disapproved the committee will be responsible for providing suggestions for improvement of the plan when it is returned to the county committee.

The legislation to establish the county committees must be carefully crafted to insure that the representation on the committees reflects all areas of the counties. Many

states have successfully formed these committees by requiring a representative be appointed from each school district in the county. These representatives should be appointed by the school board of the districts involved. There must be a mechanism included for the county; superintendent of schools to appoint a representative from any district that does not appoint someone by a specified time just as there must be the authority for the State Superintendent to appoint a committee in any county that has not formed one by a specified date. The legislation should also establish a time frame for the county committees to complete their work and present a plan to the state committee.

The legislation will need to establish guidelines for the structuring of the new districts in terms of desirable minimum size, curriculum offerings, tax base, and maximum time for pupils to be on a school bus traveling to and from school. In a state as diversely populated as Montana the time that pupils would be on a bus or the unacceptable road hazards that pupils might face if certain plans were implemented may be the key factors to be considered in determining when schools must be consolidated or kept open. A one hour riding time one way to school seems to be the suggested upper limit for older pupils to ride a bus. However, schools that need to be kept open because of these factors can still be governed as part of a larger

reorganized school district.

The county committees need to have the authority to cooperate with the committees of adjoining counties to establish school districts that cross county lines when it is prudent and more efficient to do so. The committees need to be charged with holding public hearings in each district within the county to present the requirements of the law, to get input from the citizens and the students, and to explain the plans that are developed. It was clearly demonstrated in other states that in counties where plans were successfully taken before the voters careful attention was given to involving the general public. Hearings, presentations at club and civic group meetings, and providing information through the press were successfully used.

The legislation should provide that after a plan has been developed and approved by the county committee it is sent to the state committee for approval. After approval by the state committee the plan will be subject to a vote by the people in the county. The legislation should provide that a majority of votes within the area covered by the proposed district is sufficient to approve the creation of that district. This prevents a group of voters in a very small district from blocking the reorganization plan by defeating it in that district alone.

The bonded indebtedness should stay with the old

districts unless the voters in the new district choose at a later election to assume those debts as district wide debts. Similarly if any buildings are sold the proceeds should first be credited to the indebtedness of the old districts in which the buildings were located.

The legislation should provide financial incentives to help offset some of the financial concerns that occur with reorganization of school districts. One would be to guarantee the reorganized districts at least the same total amount of state funds for the district's foundation program schedules that the individual districts would have received had they not reorganized. This could be set for a given period such as three or five years. Another would be to establish state subsidies for the construction of new buildings that needed to be constructed as a result of the reorganization. These would help to ameliorate some of the financial concerns that people have about reorganization.

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FACTORS INHIBITING MONTANA SCHOOL  
DISTRICT REORGANIZATION

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Abstract

The problem addressed by this study was to determine the primary factors that inhibited school district reorganization in the State of Montana. The second problem was to determine what neighboring states had done to alleviate those problems in their reorganization programs.

The first problem was studied by use of a survey of a stratified random sampling of districts that had been suggested for closing in an earlier study. The second was addressed by a review of literature.

The four factors selected as the major retarding factors were: 1. Consolidation would adversely affect the town. 2. Consolidation would adversely affect the students. 3. Consolidation would result in less efficient expenditures and increase total costs. 4. Consolidation would decrease local control.

These factors were addressed in the surrounding states primarily by carefully involving all segments of the population in all stages of the process of district

reorganization and by providing financial incentives with state funds to offset any increased costs in transportation or in necessary new construction.

A handbook was produced which provides recommendations to the Montana State Legislature for appropriate reorganization legislation.

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