

THE CONSOLIDATION OF ALLEGHANY COUNTY AND
CLIFTON FORGE CITY SCHOOLS: A CASE STUDY

by

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ABSTRACT

School division consolidation is a topic which elicits strong emotional responses about which there is considerable opinion but limited research data. The purpose of this study was to furnish data which would offer answers to specific questions concerning the merger of two school divisions. The context of the study was the merger which formed the Alleghany Highlands Public Schools, a rural division in Southwest Virginia. The research questions include the following: Did education improve following the merger? Were costs reduced? What happened to students in the process? How did teachers respond? How did patrons and the community react?

The methodology applied in this study consisted of a variety of research techniques including archival materials, surveys, interviews about the merger--what led to it, how it was achieved, and whether it worked. The following key findings emerged:

- students and teachers felt positive about the merger and their relation to it,

- the community believed that the merger was a success,
- the educational program was enhanced with the addition of numerous courses, the revitalization of standing courses, and the assignment of teachers to maximize the use of their expertise, and
- the rate of increases in the expenditures of local dollars for education has probably been slower than it might have been for each governmental unit to support separate systems.

The study confirmed the problems inherent in evaluating school division consolidation. It also verified that merger can respond to concerns about economy and efficiency and the use of scarce resources which must be exercised as schools attempt to meet student needs in a rapidly changing society. preparation to meet society's needs. Many of the problems, promises, and conditions following school division consolidation were revealed in the summaries of the interviews with the key actors.

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CHAPTER 1

INTRODUCTION

The measure of success generally applied to almost any unit, be it a major corporation or a small rural school system, is growth. For the school system, indicators of growth may be increased numbers of students, the opening of new buildings, the purchase of buses for the fleet, the expansion of course offerings in the program of studies, and other similar additions. Growth signifies vitality and success.

From the opposite perspective, decline is synonymous with stagnation and atrophy. A school system in decline is generally losing students; thus, it may not need all of its buildings. Currently, the public often expects the system to provide an ever expanding array of programs to meet the individual student's needs.

Current views of many professionals support decentralization of operations and decision making in local school divisions. Other professionals support centralized, consolidated school systems. Data from the Digest of Education Statistics illustrate the shrinking number of school districts in the United States. Is bigger better or is local control more important?

A continuing debate in American education over the past seventy-five years has centered on the merits of the small

school system versus the larger consolidated school system. From 1950 through the 1970's, consolidation advocates moved to bring smaller (typically rural) schools into line with prevailing business-industrial values. The consolidation advocates argued that consolidation would result in positive changes (e.g., broader curriculum, increased efficiency, economy of scale) similar to those already in place in larger schools. The reformers believed that the changes were appropriate for small schools and that consolidation was the only means by which the reforms could be implemented. The public, however, continued to appeal for neighborhood schools with relatively little bureaucratization at the school system level. According to Jonathan Sher, locale-specific information must be examined as the professionals and the public resolve the questions generated in discussions centering on reorganization of schools or school systems (Sher, 1977).

James Bryant Conant presented twenty-one recommendations for the major overhaul of public high schools in The American High School Today (1959). The top priority which Conant listed was the elimination of the small high school, one with graduating classes of fewer than 100 students. His research impacted many areas of the United States, and consolidation took a giant step forward. Over the period from 1959-60 to 1970-71, the number of school

districts in America declined from 40,520 to 17,995 (Digest of Education Statistics 1988, 83).

Several elements in the American culture contributed to making the climate ripe for consolidating schools and school districts. The post World War II baby boom had pushed young couples into the suburbs in search of the American dream of a home with a yard. Another factor was the launch of Sputnik by the Russians in 1957. This perceived threat to national security prompted the call for more sophisticated (and more expensive) education. Small districts were forced to choose consolidation as the means for meeting these demands (American School Board Journal, November 1973).

In approximately twelve states with large rural populations, several proposals and some legislation, more drastic than that which produced the wholesale reorganization of school districts in the 1950's, occurred in 1984-85. Joseph Newlin, executive director of the Rural Education Association, stated that financial considerations had led to consolidation. According to Keigh Hubel, head of an association of rural schools in Minnesota, the legislature has been subtle by bringing up proposals, under the guise of standards, that would force school systems to reorganize, without mentioning the word consolidation. The importance of a school to its community was emphasized by Paul Natchigal, consultant with the Mid-Continent Regional

Educational Laboratory (MCREL), when he said, "We know from experience that you close down a rural community by closing down its schools. Rural schools do more than educate students. They are the heart of the academic and social vitality of the community" (Education USA, 1985, 2).

The number of local school systems in the United States has decreased from more than 101,000 at the end of World War II to 15,713 systems in 1986-87 (Digest of Education Statistics, 1988, 83). Despite the rapid reduction in numbers, the National Academy for Education Committee on Educational Policy has proposed a reduction to 5,000 districts nationally (Webb, 1979). Small school advocates have organized to protect small schools and small school districts from forced reorganization. The Organization of Rural Oklahoma Schools was formed in 1984 to protect smaller districts of 500 or fewer students. Small Organized Schools (SOS) lobbied against financial gimmicks which would have forced many small schools in North Dakota to consolidate, according to Paul Pearson, superintendent of the 120-student Sherwood, North Dakota, school district and president of SOS (Education USA, 1985).

According to Larry Cuban (1979), shrinking enrollment is one of the most politically visible and divisive issues which superintendents and school boards have faced since desegregation. Over the past decade, county, state and

federal revenue shortfalls and inflation have devastated school budgets. Hospitalization, social security, and life insurance costs escalate annually as inflation cuts purchasing power. Cuban stated that "[researchers] need to explore the twists and turns of [school consolidation] issues to see if they are, indeed, cul-de-sacs for schooling (school improvement) or whether enrollment decline and consolidation open up promising paths for schools to pursue" (35).

Moreover, because "schools function to strengthen or weaken communities" (Sher, 1977, 43), the decision for consolidating school systems must be examined for efficacy in several areas. The major question is whether bigger results in better. Equity in the provision of education to all students so that they may maximize their potentials is an obvious concern. Yet, as decisions are made to increase the educational opportunities of students, the school must be viewed as a major component of the social structure of the local communities involved.

PURPOSES OF THE STUDY

The purposes of this study were:

1. to describe the process by which the Alleghany County and the Clifton Forge City school systems were consolidated to form the Alleghany Highlands Public Schools on July 1, 1982, and

2. to examine the effects of the merger on the students, the teachers, the patrons and community, the educational program, and finance.

This study traced the history of school consolidation in the Alleghany Highlands from 1980-1983, together with precipitating events prior to 1980. The result of these events was the formation of the Alleghany Highlands Public Schools, effective July 1, 1982. Notable events (results of the consolidation) after 1983 are also reported.

RESEARCH QUESTIONS

The research questions which guided this study were:

1. What happened to students in the merger process?
2. What were teachers' perceptions about the merger?
3. How were finances influenced by merger?
4. How did patrons and the community react to the merger?
5. What changes in the education program were apparent following the merger?

JUSTIFICATION FOR THE STUDY

While school system consolidation is rare in Virginia, it occurs fairly often across the nation. Data are needed to assist school systems addressing problems which suggest

merger as a possible solution. The study provides information which may assist school systems to predict potential impacts of consolidation.

Willard Fox stated in an "Issue Brief" in the November, 1986, The School Administrator that "also forgotten in the melee [of consolidation] are the children. To date, no one has been able to prove that children get a better education in larger districts" (24). This study examined the impacts of consolidation on high school students and their educational programs. The study helps to fill a void in the body of research on school system consolidation.

LIMITATIONS OF THE STUDY

While the researcher attempted to reconstruct a past situation as close to reality as possible, error is associated with reconstructed reality. The focal period was 1980-1983; however, events on each side of that time span have also been included, as appropriate, in an attempt to strengthen the findings and conclusions reported in this study.

ORGANIZATION OF THE STUDY

This study of the consolidation of the Alleghany County and Clifton Forge City school divisions is organized in six subsequent chapters.

The literature is reviewed in Chapter Two. The context within which consolidation occurred is described.

In Chapter Three the methodological design is discussed. A conceptual framework for the study is also outlined.

In Chapter Four the merger process and environment are described. The genesis of the merger is chronicled with much of the information derived from interviews with key actors.

In Chapter Five the research findings are presented and analyzed. Responses to the research questions are detailed.

In Chapter Six the benefits of merger are summarized, conclusions drawn, and recommendations tendered. The chapter concludes with an Epilogue -- reflections of the author based upon her personal participation in the consolidation process.

CHAPTER 2

REVIEW OF LITERATURE AND CONTEXT FOR THE STUDY

PURPOSE

The intent of this review is to provide a context or background for this study through an examination of related literature and a review of the events which led to consolidation of the Alleghany County and Clifton Forge school systems. To begin to understand the potentially emotional effect of the term school consolidation, the nature of school "ownership" and control in America is worth examining.

Tutors in Southern homes and dame schools in New England were the first types of schooling for children in America with the family bearing the primary responsibility for instruction or providing for the instruction of its children. Essential to early Americans was a sense of autonomy; many Americans had immigrated to achieve liberty and to chart their own destinies. Education was a recognized core value, the purpose of which was to maintain political liberty and (particularly in New England) to perpetuate religious values.

To part with the tradition of neighborhood schools has been a sacrifice in many communities, especially in rural areas. The school has been one of the social institutions with which rural people came in contact daily. Thus, the

consolidation of rural high schools became a major source of controversy in the twentieth century (Tyack, 1974, 25).

In the late twentieth century (1970's), school system consolidation became a topic for consideration in Alleghany County, Clifton Forge, and Covington, Virginia. The rural county and its two small cities border the state of West Virginia and lie approximately 50 miles north of Roanoke, Virginia. Years of study and discussion culminated in the consolidation of Alleghany County and Clifton Forge schools into the Alleghany Highlands Public Schools on July 1, 1982. This chapter provides a background for understanding why and how school system consolidation in the Highlands occurred.

The chapter has been divided into three main sections: National Trends, The Virginia Context, and and School Consolidation in the Alleghany Highlands. The information presented in this chapter comes from numerous sources. One primary source was print materials, including legal documents, policy materials, operational plans, school board minutes, governing body minutes, reports and studies, and other pertinent materials. A second primary source was the interviews of key actors. Fifteen interviews with key actors were completed to gain insights into the merger process and its history.

OVERVIEW OF ISSUES
SURROUNDING SCHOOL CONSOLIDATION

In nineteenth century America, the school was a focal point of community life. One-room schools all over the nation provided a center for educational, social, dramatic, political, and religious activities. Thus, the common school both reflected and shaped a sense of community.

The school and community were related in a tightly knit group. When families were amicable, the school reflected cohesiveness; if there was discord, the school was typically in the middle. A common cause for argument was the location of the school. Numerous meetings over an extended period of time might be required to settle the question of where to locate the school. In Iowa one night, a group of farmers secretly moved a school house one mile to their preferred site. In tiny Yoncallo, Oregon, feuds split the people into three factions each with its own school. However, the rural school usually served to integrate the community (Tyack, 1974).

Consolidation of schools and transportation of students were among the remedies for improving rural schools stated by the National Education Association (NEA) Committee of Twelve on Rural Schools in 1895. The reform of the rural school began the transfer of power from the laymen to the professionals. Patrons often resisted consolidation and standardization; one study of rural schools in New York State

in 1921 revealed that 69 percent of the people opposed consolidation of schools. Later studies in Ohio, Wisconsin, and Idaho confirmed those results (Tyack, 1974).

In the late nineteenth century, consolidation policy was first debated. Schooling was a haphazard occurrence in many locations with inadequate facilities and barely educated teachers. Society in general was experiencing the upheaval of change engendered by industrialization. In fact, education was blamed for the disintegration of rural life as society was bombarded by institutionalization, bureaucratization, centralization, and professionalization. Consolidation became the key concept as a movement developed to establish standards where none existed, to raise existing standards, and to improve efficiency in rural schools (Kay, 1980). In current literature, decentralization is recommended. The results of decentralization in the business world may be possible outcomes in the educational setting. Thomas Peters and Robert Waterman addressed the "co-existence of firm central direction and maximum individual autonomy" as means to elicit desired responses in terms of productivity from employees (1982, 318).

NATIONAL TRENDS

School district size has long been a concern when quality issues are discussed. A report titled School District Organization in Illinois circulated by the Illinois State Board of Education states

. . .in hundreds of very small high schools in Illinois, students are suffering a significant loss in opportunity to learn when the courses available to them are compared with those available to students in high schools with enrollments of more than 500 pupils. Opportunities to take advanced mathematics, foreign language, and even remedial courses are significantly lower in such small schools and are widely available in schools enrolling up to 1,000 students. Such lack of opportunity is particularly significant when one realizes that the results of achievement measures indicate significantly lower scores in smaller schools and analysis indicates that a student's achievement is directly related to the size of the high school he or she attends (Rogers, 1985, 36).

However, other researchers have reached diametrically opposite conclusions. According to David, size is not an independent variable affecting the outcomes of schooling (David, 1977). David found no evidence that size was detrimental on the key variable, academic attainment, while Bidwell (1977) concluded that achievement levels were actually lowered in some large schools by increasing pupil-teacher ratios.

The purposes usually offered by the many educators who advocate the consolidation of schools include economic efficiency, a broader offering of courses, and teachers teaching in their special fields. While the number of school

districts has declined dramatically in the past forty years, state politicians are still looking for the ideal school district, the size of which varies from state to state (Fox, 1986).

State legislators have considered legislation to merge school districts in Iowa, Arkansas, South Dakota, Illinois, North Carolina, Ohio, and Nebraska. Illinois, North Carolina, and Colorado have decided not to consolidate because of vehement public reactions and the belief that major economic savings would not result. South Dakota and Iowa introduced financial incentives to school districts which consolidate (Fox, 1986).

John V. Connoley's (1960) view of consolidation contained several important points. His study was designed to determine what changes in educational opportunity were provided secondary students in Pennsylvania when school systems were consolidated. Connoley's conclusions were:

1. a joint operation stimulates the provision of educational opportunities in grades 7 and 8,
2. the school's philosophy concerning the importance of academic subjects did not change,
3. there is no apparent relationship between school size and teacher load except in schools with less than 100 students,
4. library expenditures did not keep pace with increased enrollments, and
5. students from schools with enrollments of less than 300 benefit more than students of larger schools (98).

Carolyn Mullins noted that superintendents are often the catalysts for consolidation, and school boards are proponents in many situations. A superintendent, survivor of four consolidations, summed his beliefs:

What you have to do is get people talking about consolidation, not quarreling about it. Provide accurate information to the community and it, if sound, will be approved because people always do those things they want to do (1973, 24).

David Holland, John Baritelle, and Greg White (1976) noted that consolidation cannot be counted on to yield large economic savings in sparsely populated areas. In fact, consolidation may be ill advised in such a location because of long commutes from home to school.

Carl Eisemann (1956) examined two communities and their schools to draw conclusions which might be used in substantiating or rejecting the values of school district reorganization. He looked at educational opportunity, educational results, educational costs, and community processes. He concluded that reorganization appears to be one factor in producing higher achievement. Walter Kent (1957) found a broader curriculum, more numerous course offerings, and more adequate facilities in nine reorganized high schools in Indiana. William Drier (1982) predicted that certain pressures would continue to effect consolidation. He

listed declining birthrate, inflation, limited curricular and other learning experiences, and parental attitudes.

Proponents of school consolidation often state that efficiency will increase and correspondingly per pupil costs will fall. However, several studies demonstrate other results. Neil Rosenberg (1970) concluded that per pupil costs for schools of 90 to 259 students were very little more than those in schools three to four times bigger. C. M. Clements and G. E. Hickrod (1970) found that the optimum school system size in terms of per pupil operating expenditures was 750 students in a K-8 district, 500 in a 9-12 district, and 5,000 in a K-12 district.

Consolidation should not be forced on the size criterion alone. Reorganization may be necessary because of financial considerations where citizens are unwilling to increase taxes to support schools. A better learning atmosphere and improved school system are the criteria which should produce school consolidation (Rogers, 1987).

According to Mullins (1973) many districts are ready for reorganization because they are mini rather than maxi-districts. Approximately 73,000 small, middling small, and even middle sized school districts

in nearly every state in the United States have engaged in consolidation. In the 1960's, ten school districts disappeared every day. Many states enacted legislation mandating the dissolution of non-operating districts.

Mullins also suggested advantages which could be attributed to consolidation including:

- fuller utilization of facilities and teachers,
- savings from bulk purchases and combined transportation costs
- wider range of program for the same or less money,
- enhanced K-12 articulation, and
- greater equity through sharing the wealth of tax dollars (26).

THE VIRGINIA CONTEXT

In 1943 Francis G. Lankford was employed by the Virginia State Chamber of Commerce (VSCC) to study secondary education in Virginia ("Abstracts, Briefs and Summaries of Important Studies on Virginia Education," Gordon, 1982). The report from his study entitled Opportunities for Improvement of High School Education in Virginia made recommendations in ten areas, one of which was the consolidation of rural high schools.

The "Denny Report" chaired by George H. Denny in 1944 also noted concerns about the quality of smaller schools.

The report extended to such concerns as building new facilities, improving vocational education, and attention to the drop-out problem (The Virginia Public School System: Report of the Virginia Education Commission, (1982).

Virginia Constitutional Issues

The Virginia Constitution explicitly speaks to the Commonwealth's commitment to public education in the Education article, Article VIII (Report of the Constitutional Revision, 1969). In fact, Virginians' commitment to education is long standing as evidenced in a letter written by Thomas Jefferson, a devout believer in the efficacy of education, to George Wythe in 1786. Jefferson wrote

I think by far the most important bill in our whole code is that for the diffusion of knowledge among the people. No other sure foundation can be devised for the preservation of freedom, and happiness (Boyd, 1982, 257).

While Virginia's commitment to education has longevity, many problems remain. Among those problems cited by the Commission on Constitutional Revision (1969) were the retention of ever more costly small school districts established upon county or city lines; increasing sophistication of instructional aids and equipment together with inflation increases per capita educational cost, especially in areas with sparse population; and the shift of political representation from rural to urban which erodes the

ability of poorer rural areas to secure adequate state assistance through the political process.

Several concerns cited by the Commission on Constitutional Revision are addressed in Section 22.1-25 of Virginia School Laws 1988 Edition issued by the Department of Education. Section 22.1-25 states that the Board of Education is charged with the responsibility of dividing the Commonwealth into school divisions of geographical area and school-age population to promote the realization of the standards of quality and subject to certain conditions:

1. The school divisions as they exist on July 1, 1978, shall be and remain the school divisions of the State until further action of the Board of Education taken in accordance with the provisions of this section except that when a town becomes an independent city, the town shall also become a school division.
2. No school division shall be divided or consolidated without the consent of the school board thereof and the governing body of the county or city affected or, if a town comprises the school division, of the town council.
3. No change shall be made in the composition of any school division if such change conflicts with any joint resolution expressing the sense of the General Assembly with respect thereto adopted at the session next following January one of the year in which the composition of such school division is to be changed.
 - B. Notice of any change in the composition of a school division proposed by the Board of Education shall be given by the Superintendent of Public Instruction, on or before January one of the year in which the composition of such school division is to be changed, to the clerks of the school

board and of the governing body involved and to each member of the General Assembly.

- C. Subject to the conditions set forth in subsection A, the Board of Education shall consider the following criteria in determining appropriate school divisions:
1. The school-age population of the school division proposed to be divided or consolidated.
 2. The potential of the proposed school division to facilitate the offering of a comprehensive program for kindergarten through grade twelve at the level of the established standards of quality.
 3. The potential of the proposed school division to promote efficiency in the use of school facilities and school personnel and economy in operation.
 4. Anticipated increase or decrease in the number of children of school age in the proposed school division.
 5. Geographical area and topographical features as they relate to existing or a available transportation facilities designed to render reasonable access by pupils to existing or contemplated school facilities.
 6. The ability of each existing school division to meet the standards of quality with its own resources and facilities or in cooperation with another school division or divisions if arrangements for such cooperation have been made. (Code 1950, 22-30.1; 1978, c. 456; 1980, c. 559).

Article 6 states that the supervision of schools in each school division composed of less than one county or city or part or all of more than one county or city must be vested

in a single school board. The school board must be composed of no fewer than six nor more than nine members; the exact number to be determined by the governing body or bodies affected. The effective date for any school board formed under the provisions of Article 6 is the first day of July of a second year. Former boards will cease to exist as of the effective date (Virginia School Laws 1988 Edition).

Further, the title to all school property in the school division will be vested in the division school board. A written agreement by participating school divisions with the approval of respective governing bodies prior to consolidation may secure the title to property. However if there are questions, a circuit court in the jurisdiction where the property or any part thereof lies may determine the title to the property (Virginia School Laws 1988 Edition).

Governmental Consolidation in Virginia

A recurring problem is the peopling of the land just beyond the boundaries of municipalities. The problems of governmental jurisdiction boundaries in Virginia have consequences not found in other states; Virginia is the only state which follows a state-wide practice of city-county separation, a practice which dates back to 1634 when the General Assembly divided the colony into eight shires or counties, (Bain, 1967). Prior to 1904, changes in city

boundaries resulted from special acts of the Virginia General Assembly (Edwards, 1984). In that year, the General Assembly adopted a statute providing the need for extending a municipality's boundaries (annexation) should be decided by a special court with judges selected from the state's judicial system (Bain, 1965).

Some discussion of Virginia local government may help to explain why consolidation of governmental jurisdictions has been accepted in Virginia. All in all, Virginia local government is rather simple. Overlapping jurisdictions are virtually nonexistent, functions are rarely duplicated, and the responsibility for the conduct of local government business is usually clearly fixed (Temple, 1963).

Built into the Virginia structure of city-county separation are three methods by which the system may be adjusted. They are:

- (1) the creation of small, dependent county sanitary districts under the jurisdiction of the county board of supervisors to provide limited municipal services in urban enclaves of the county;
- (2) the incorporation of the urban area as a town or a city; and
- (3) the annexation by a town or city of adjacent county areas that have become urbanized (Temple, 1963, 5).

In addition, two other methods have developed in importance. There is first the concept of the urban county, and secondly, the merger of a county and a city to form a new city.

Section 15-1-1130 to 15.1-1147 of the Code of Virginia deals with the consolidation of local governments. Consolidation is permitted to all units of local government, with the completion of basic steps (Temple, 1963).

The basic steps in the consolidation process are as follows:

- (1) The local governing bodies negotiate a consolidation agreement.
- (2) After the agreement is reached, the agreement must be filed with the circuit court, neighboring jurisdictions must be notified of the agreement, and the agreement must be published in local newspapers.
- (3) If a consolidated city is proposed, a special three-judge court determines if the city is eligible for city status.
- (4) The referendum on consolidation is held; to pass, it must receive a favorable majority vote in each jurisdiction proposing to consolidate.
- (5) The General Assembly must enact a charter for a consolidated city; in some instances, General Assembly approval must be sought if a consolidated county is proposed.
- (6) In the case of a consolidated county, new county officers are elected prior to consolidation, unless the consolidation agreement otherwise specifies the membership of the governing body.
- (7) On the date specified in the agreement, the consolidated government comes into being (Fields, 1983, 20).

The discretion permitted local officials involved in decision making in consolidation, under state law, has contributed to the high success rate that consolidation

efforts have achieved in Virginia, when the success rates are compared with the success rates in other states. Local officials enjoy wide latitude in designing the form of a consolidated government (Fields, 1983). Political conditions, not legal barriers, have been the real deterrents to merger in Virginia.

In Virginia, local government "consolidation is the merger or combining of two or more governments, usually a result of a precipitating event" (Fields, 1983, 1-2). Consolidation offers efficiency and effectiveness, helps eliminate spillovers which benefit citizens in adjacent sections and who have not contributed financially for the service, fosters better understanding and use of government, and matches area needs with area resources (Fields, 1983).

Virginia has witnessed more consolidations of local governments than any other state in the United States. The first governmental consolidation occurred in 1910 when the cities of Richmond and Manchester merged. The towns of Waynesboro and Basic City consolidated in 1923. In 1952, the first example of city-county consolidation occurred with the merger of the City of Hampton, Elizabeth City County, and the Town of Phoebus (Fields, 1983).

Ten years later, the City of Virginia Beach and Princess Anne County consolidated as the City of Virginia Beach; the City of South Norfolk and Norfolk County merged to become the

City of Chesapeake. Other consolidation efforts involving counties and cities were unsuccessful until the cities of Suffolk and Nansemond merged in 1974. There had been two town mergers during the time period, between Tazewell and North Tazewell in 1963 and between Christiansburg and Cambria in 1964 (Fields, 1983).

In 1971, the General Assembly enacted a moratorium on annexations and city incorporations for certain parts of the state. In 1972, the moratorium applied to all counties adjoining cities in the entire state. Additionally, the General Assembly prohibited the counties from becoming cities through consolidation. This moratorium was lifted in 1979, an event marked by a surge in consolidation efforts (Fields, 1983).

Consolidation has provided a means for some jurisdictions to solve the problems of fixed borders, declining populations, and stagnant economies. How much is achieved by consolidation efforts may well depend upon the precipitating events which cause jurisdictions to examine the possibilities offered by consolidations.

SCHOOL CONSOLIDATION IN THE ALLEGHANY HIGHLANDS:
THE EARLY YEARS (1967-1976)

1967-1972

Alleghany County, Clifton Forge City, and Covington City are located in the northwest section of Virginia adjacent to the West Virginia border. Because all three jurisdictions share a common social, economic, and cultural environment, consolidation of at least some governmental services seemed inevitable.

When Mr. Ray Beasley stepped down (1967) from the superintendency of the Covington City School System the Covington Board believed there was an opportunity to bring the Alleghany County and Covington schools together to some degree. Mr. Leonard Switzer, as the Covington School Board's representative, met with the Alleghany County School Board at Boy's Home. Robert Burrows was chairman of the Alleghany School Board at the time. The Covington School Board, through Mr. Switzer, proposed that one superintendent serve both school divisions. If the arrangement proved successful, the proposal called for consolidating management in total at the board office level. The Alleghany County Board did not accept the proposal (Interview with E).

When Walter Hodnett retired (1970) from the position of superintendent of the Alleghany County Schools, Mr. Switzer approached the Alleghany County Board again on behalf of the

Covington Board with the same proposal. The response from the Alleghany County Board was that they were sure that the Board of Supervisors would not accept the proposal. The Covington City Council had never committed themselves either (Interview with E).

The Peabody Study: 1972-73

In October 1972 the Fifth Planning District Commission engaged the Division of Surveys and Field Services of George Peabody College for Teachers to study the school divisions in the three jurisdictions. The study, started in November 1972 and completed in the spring of 1973, addressed these preordained purposes:

1. to provide an independent professional evaluation of the total school enterprise for each school division;
2. to propose recommendations for a long-range program of school development in each school division, assuming that the divisions continue to operate separately;
3. to propose recommendations for types of cooperative arrangements among the three school divisions if separate operations continue; and
4. to test the feasibility of merging the three school divisions into a single division and propose procedures for merger, if such is deemed desirable. (Peabody, 1973, V).

Following the study, the Peabody Report was issued in the spring of 1973. Merger of schools was recommended

because the three separate systems were too small to justify the staff and services needed to provide a quality educational program. The report stated that merger would:

- equalize educational services for all children,
- provide one organizational plan for all schools,
- equalize salaries and services,
- create a junior high school in each division, and establish one senior high school for grades 10-12,
- provide a single central administration, and
- result in a savings of at least \$2,000,000 in construction costs for needed improvements in school facilities (254-256).

The report also included the admonition that merger should occur only if the local governments were consolidated. Following the release of the Peabody Study (1973), the Covington School Board met with the Alleghany County School Board with the thought of consolidating schools. The Alleghany County School Board wanted to study the proposal. When the Covington School Board did not hear from the Alleghany Board, a contact was made. The County School Board's response was that the Board of Supervisors was not willing to consolidate (Interview with E).

The Sub-Committee for Education: 1975-1976

Following the Peabody Report (1973) the three school boards appointed a nine member lay sub-committee to study the consolidation of the three school divisions. The study group was a lay committee comprised of eight parents and one teacher. The committee relied heavily on the Peabody Report, believing that professional educators knew better how to solve educational problems than did other citizens (Interview with I). In May 1976, a final report was submitted to Betty Carpenter, Chairman of the Consolidation Executive Committee. The recommendations of the Consolidation Sub-Committee for Education were:

1. All Alleghany County, Covington and Clifton Forge elementary school enrollments should remain the same (Grades K-7). One exception is noted [students in the Central attendance zone and whose residences are nearest Covington City should attend school in Covington until the overcrowding is alleviated at Central.]
2. Alleghany County High School should be designated a senior high school for all 10th, 11th, and 12th grade students currently attending the three separate secondary schools.
3. Covington and Clifton Forge High Schools should be converted to modified junior high schools (Grades 8-9).
4. This merged school system, when reorganized, be administered under one superintendent, plus whatever administrative personnel are deemed necessary to efficiently oversee the educational and financial well-being and growth of the merged unit (Final Report, Consolidation Study Sub-Committee for Education, 1976, 19-21).

No action was taken as a result of either the Peabody Study or of the Consolidation Study Sub-Committee (Interview with I).

CHANGING ACTORS STIMULATE RECONSIDERATION
1977-1980

Superintendent Changes

Events in Alleghany County and Clifton Forge over the next several years, 1977-1980, set the stage for reconsideration of school system consolidation. Two specific precipitating events involved vacancies for the positions of school division superintendent in both localities.

In July 1977, E. Mark Pace was employed to fill the position of superintendent of Alleghany County Public Schools. Of significant note is the fact that Pace was not only new to the position but also new to the locality. Thus directions in school system management and relationships with the power structure in Alleghany County and in Clifton Forge were changed dramatically. A somewhat corresponding situation had developed in Clifton Forge when the position of superintendent of schools became vacant in that system because of dissatisfaction with the performance of the superintendent (Interviews with A, B, C).

When James Laughlin announced his retirement as superintendent of schools in Covington in 1978, the Covington Board asked Switzer to try again. Switzer met with Pace, the newly appointed superintendent in Allegheny County and asked whether he would consider serving as the superintendent for both Covington and Allegheny County. Pace replied that he would be willing to give it a try but that he needed to discuss the proposal with the Allegheny School Board and they, in turn, with the Allegheny County Board of Supervisors. No reply was made to the Covington Board (Interviews with A and E), which subsequently employed Mr. Frank Cosby as its superintendent in July 1978.

When the Clifton Forge School Board's problems peaked, Martin J. Loughlin was hired as interim superintendent in July 1980. He was hired for the expressed purpose of engineering either a two-way or three-way merger of school systems. Clifton Forge school officials had concluded they could not continue to support the school system at the level of quality desired (Interview with C, D).

Meanwhile, the Covington School Board employed (1980) the Management Improvement Corporation of America (MICA) to explore alternatives for providing educational services. One recommendation was to explore all

possibilities for cooperative arrangements with nearby school divisions. It was hoped these arrangements might lead to improved enrollment and increased revenue as well as adding to the educational opportunities for students (Interview with E). A different view concerning the contract with MICA was expressed by another interviewee (A). According to A, the Covington City Council initiated the study with the purpose of finding means for reduced cost through the elimination of some administrative positions. However, MICA recommended closing two elementary schools, a move which the city's mayor did not support (Interview with A).

Pace, Loughlin, and Richard Flora, Clifton Forge City Manager, began meeting in July 1980 to discuss merger possibilities following a series of merger meetings which had involved Alleghany County, Clifton Forge, and Covington during August and September, 1980. The meetings were sponsored by the Greater Alleghany Chamber of Commerce and provided opportunities to discuss three-way consolidation of schools: a merger of Alleghany County, Clifton Forge, and Covington. Discussions had been stimulated as a result of an economic depression in the area. A fire at a local industry had resulted in the loss of over 500 jobs. At the same time, the Virginia Electric and Power Company

project at Back Creek experienced a severe curtailment in construction. The combined layoffs left the area with a 13 percent unemployment rate (Interview with A).

At its June 9, 1980, meeting, the Covington Board "expressed its approval of the consolidation concept" and Charles Wingfield, a School Board member, noted that "it would give our children an opportunity to have a great school system" (Minutes Covington School Board, June 9, 1980). However, the Covington City Council passed a resolution on October 1, 1980, stating that they would continue to operate their own educational system and that Covington would be willing to accept students from Alleghany County and Clifton Forge into City Schools on a contractual basis (Covington City Council Resolution).

Merger talks continued with representatives from Alleghany County and Clifton Forge following a meeting on October 2, 1980. Covington remained firm in their decision to remain independent. Pace stated that "'consolidation is a political issue, based on political decisions.'" Loughlin added, 'we have to have numbers to have good quality educational programs.'" Both superintendents supported continuing merger talks (Covington Virginian, October 3, 1980).

Economic woes, unemployment, and talk of annexation encouraged the governing bodies to continue with discussions of cooperation (Roanoke Times, October 5, 1980). Further, the Alleghany County Board of Supervisors voted unanimously to continue the feasibility study of cooperation and possible consolidation on October 21, 1980. The Clifton Forge City Council took similar action on October 20, 1980.

ALLEGHANY-CLIFTON FORGE SCHOOL SYSTEM MERGER
(1981-1982)

Resolution for Consolidation

On April 6, 1981, the Alleghany County Board of Supervisors and the Clifton Forge City Council passed resolutions calling for "consolidation of the communities' school systems and for the full governmental consolidation of the County and the City." In addition the Board of Supervisors and City Council directed the County Administrator and the City Manager, with full consultation with the School Boards, "to bring before the Board and Council by May 30, 1981, recommendations for an independent, professionally prepared plan for the consolidation of the County and City school systems (Alleghany County Resolutions, April 6, 1981, and Clifton Forge Resolutions, April 6, 1981).

On May 5, 1981, Mark Pace, Martin Loughlin, and Mike Scott, Clifton Forge Board member, visited with S. John Davis, State Superintendent of Public Instruction, and J. Wade Gilley, State Secretary of Education, to request consolidation incentive funds to encourage the merger efforts. A formal request was made for financial assistance from the state in the resolution adopted on May 12, 1981, by the governing bodies.

Implementation Plan

Development of the merger plan (Appendix A) was funded through the Office of the Secretary of Education of Virginia upon the request of the school boards and governmental agencies in Alleghany County and Clifton Forge. Two consultants were recommended by John Davis, Superintendent of Public Instruction, to the State Board of Education to develop an implementation plan. The consultants, Wayne Worner, Professor of Education at Virginia Tech, and Kenneth Fulp, retired Superintendent from Chesapeake, met with James Price from the Secretary's staff and William Cochran, Deputy Superintendent of Public Instruction on June 19, 1981. The consultants were given the charge to provide assistance to the two local governing bodies and their school boards in achieving consolidation of educational

responsibilities. Two caveats were given to the consultants:

1. Ensure that the quality of education in either school system not be reduced, recognizing that the plan was not to be used as a opportunity to enhance the quality of the system (the position being that improvements, if desired, should come independent of the consolidation plan) and
2. Operate within existing revenues and perhaps be able to demonstrate some efficiencies, (Merger Plan, November 1981).

The consultants made on-site reviews of facilities and records and attended meetings with various personnel in local government and the school divisions. They also participated in three public meetings. In a joint meeting with the Alleghany County Supervisors, Clifton Forge City Council, and the two School Boards on September 1, 1981, the localities indicated that they would operationalize the plan for "consolidation of school programs and services including the merger of school administration, policies and procedures, and all operations under the direction of one combined or merged School Board." Provisions for the combining of the governmental service of education without combining the governmental units responsible for fiscal control of the service would be a complex component of the plan and of the future planning and operation of the school system. However, local costs were attributed, it had to be done so as not to

cause a windfall to one locality and a burden to the other (Merger Plan, 1981).

Worner transmitted the merger plan to James Price, Assistant to the Secretary of Education, on October 21, 1981. Fulp and Worner met with Price and Cochran on November 5, 1981. The merger plan was transmitted to Richard Flora, City Manager in Clifton Forge, and to Randy Arno, Administrator for Alleghany County on November 6, 1981.

Resolution for Petition to the State Board of Education

On December 1, 1981, a resolution for the consolidation of schools was adopted by the Clifton Forge City School Board. The Alleghany County School Board adopted a similar resolution on December 4, 1981. The Board of Supervisors of Alleghany County, and the City Council of Clifton Forge adopted similar resolutions on December 7, 1981, to request "the Board of Education of Virginia to establish a consolidated school division for Alleghany County and the City of Clifton Forge to begin operation on July 1, 1982 (See Appendices B, C, D). S. John Davis, Superintendent of Public Instruction, informed local officials and the members of the General Assembly that the Board of Education for the Commonwealth had "approved a resolution (December 11, 1981, abolishing the City of Clifton Forge School Division and the Alleghany County School Division and [had created] a single

school division for the county and city, effective July 1, 1982 (S. John Davis, 1981) (Appendix F).

Senator Dudley Emick agreed to sponsor legislation in the upcoming session of the General Assembly to provide financial incentives during the first two years of the consolidated Alleghany Highlands. Senator Emick had received a letter dated November 25, 1981, from S. John Davis, State Superintendent of Public Instruction, encouraging school consolidation efforts. Language was included in the Appropriations Act to provide funding for two years at the level of the most favorable composite index of the two jurisdictions. The Finance Committee and the House Appropriations Committee amended the bill to provide financial incentives to any localities in Virginia which consolidated schools (Interview with A).

On February 16, 1982, J.R.T. (Tate) Bowen, vice-president of the Alleghany Taxpayer's Association, an organization formed in January 1980 to oppose the rather large tax increase proposed by the Alleghany County Board of Supervisors, presented a petition against consolidation with 1,840 signatures to the Supervisors and the Alleghany County School Board (Interview with J).

The Alleghany Taxpayer's Association planned a trip to see Governor Robb to request that a referendum relative to school consolidation be required. When they arrived at the

Capitol, the Governor refused to see them. Instead, Sullivan, Robb's Executive Assistant for Policy met with them. According to an interviewee, the school board and supervisors went to Richmond one day after the Taxpayer's group to meet with Governor Robb. Bowen received a letter dated February 25, 1982, from the Governor stating that it was too late to take a bill to the legislature to call for a referendum on consolidation (Interview with J).

On June 20, 1982, the School Consolidation Agreement (Appendix E) between Alleghany County/Clifton Forge governing bodies and school boards was signed, with July 1, 1982, the date on which the Agreement would go into effect.

Summary

This chapter has attempted to describe the context for this study. The tradition of the neighborhood school and the autonomy of operation were established as values held since the early days of America. The school is portrayed as a social institution, especially in rural settings; a the gathering place in communities for all sorts of social occasions.

School consolidation had become a controversial issue in the late nineteenth century, progressing to a major source of controversy during the twentieth century. School consolidation had been advanced by the Committee of Twelve

on Rural Schools as early as 1985. Consolidation was viewed as the most likely means to correct the faults in rural education.

Perspectives on school system consolidation have been presented from the national, the Virginia, and the Alleghany Highland views. Specific information has been provided about past efforts to achieve consolidation. A summary of the efforts which led to the consolidation of Alleghany County and Clifton Forge schools as of July 1, 1982, is outlined in the calendar of events which follows.

Calendar of Major Events in Connection
with the Merger Creating/Operating the
Alleghany Highlands Public Schools

- | | |
|-----------------|--|
| 1967 | Ray Beasley, superintendent of Covington Public Schools, retires |
| 1970 | Walter Hodnett, superintendent of Alleghany County Public Schools, retires |
| 1973 | <u>The Peabody Report</u> issued |
| 1976 | Consolidation Sub-Committee for Education issues <u>Final Report</u> |
| 1977 (July) | E. Mark Pace employed as superintendent, Alleghany County Public Schools |
| 1978 (February) | James Laughlin, superintendent of Covington Public Schools, announces his intent to retire in June |
| 1978 (April) | Leonard Switzer, Covington School board member approaches Dr. Pace about possible joint services |
| 1978 (July) | Frank Cosby employed as superintendent, |

Covington Public Schools

- 1978-1980 Period of upheaval in superintendency of Clifton Forge Schools
- 1980 (July) Martin J. Loughlin employed as superintendent, Clifton Forge Public Schools
- 1980 (August/
 (September)) Chamber of Commerce provides forum for discussions of merger, including Alleghany County, Clifton Forge, and Covington
- 1980 Unemployment rate reaches 13% in region; fire at Hercules and severe curtailment of activities at Back Creek Project
- 1980 (October) Covington City Council resolves to maintain an independent school system
- 1980 (October) Alleghany County Board of Supervisors and Clifton Forge Council act to continue feasibility study of cooperation and school system consolidation
- 1981 (April) Alleghany County Board of Supervisors and Clifton Forge City Council passes resolutions for school consolidation and full governmental consolidation.
- 1981 (May) Incentive funds requested
- 1981 (June) Worner and Fulp employed to develop a merger plan for the Alleghany County and the Clifton Forge schools
- 1981 (September) Alleghany County Board of Supervisors, Clifton Forge City Council, Alleghany County School Board, and Clifton Forge School Board decide to operationalize the plan for merger
- 1981 (October) Merger Plan transmitted to office of Secretary of Education
- 1981 (December) Resolutions for the consolidation of schools adopted by governing bodies and school boards
- 1981 (December) State Board of Education creates the Alleghany Highlands Public Schools,

effective July 1, 1982

1982 (March) Salary schedules developed

1982 (June) Primary portion of new policy manual completed

1982 (June) School Consolidation Agreement signed

1982 (July 1) First meeting of consolidated Alleghany Highlands School Board

1982 (July) First meeting of consolidated Alleghany Highlands School Division

1982 (August) First consolidated pre-school staff development activities

1982 (Fall) Various committees involving school and community recommend curriculum, school names, colors, mascots

1982 (October) Teachers complete Assignment Reference Forms (for 1983-84)

1982 (December) First Curriculum Directory for Alleghany Highlands Schools (8-12) published

1982-83 Appointments made to fill various positions

1983 (June) Middle school curriculum workshop held

1983 (August) Clifton Middle School opened; Alleghany High School and Clifton Forge High School student bodies merged

1983 (August) Alleghany County High School and Clifton Forge High School student bodies merged

CHAPTER 3

DESIGN OF THE RESEARCH

INTRODUCTION

The purpose of this study was to describe the consolidation of the Alleghany County and the Clifton Forge City school systems. To achieve this purpose, naturalistic inquiry was used to discover what occurred in the consolidation process together with how consolidation affected public education, the people in the educational institution, and the community at-large.

In the process of discovering and verifying what happened, a number of techniques were employed. The various techniques were selected specifically to address the research questions which drove this study. The discussion of methodology is organized around each of the five research questions.

BACKGROUND OF NATURALISTIC RESEARCH

Descriptive research should be the most logical way of identifying problems and trends (Jones, 1973). Denzin (1971) supports the naturalistic approach by pointing out that

. . . the naturalist is committed to sophisticated rigor. Which is to say he is committed to making his data and explanatory schemes as public and replicable as possible. Thus he details in careful fashion the nature of his sampling framework,

triangulates his observations and continually assesses the empirical grounding of his causal propositions. (167)

E. W. Menzel, a primate anthropologist, saw naturalistic inquiry as the broadest form of inquiry:

There is . . . no logical basis for the current attitude . . . that naturalistic and experimental research are in opposition to each other. This can hardly be so, because naturalistic research is the more generic. Naturalistic research is any form of research that aims at discovery and verification through observation, and this includes as specialized cases all techniques, apparatus, and procedures of experimentation. (Willems & Raush, 81)

The methodology used in this study employed the Guba model which is expressed as a wave conceptualization of naturalistic inquiry (See Figure 1). In this model, at the beginning of the inquiry, the investigator is in the discovery mode. After some time passes, the investigator has some hypotheses or perhaps only hunches which prompt him to move into the verification mode. As time passes, he will move back into discovery and then to verification again (Guba, 1978).

Naturalistic inquiry is determined by what the investigator chooses to do; "i.e., the particular methodology which he chooses to apply" (Guba, 1978, 8). Although certain authors (Barker, Menzel, and Gutmann) suggest that the investigator can approach his field with a clear mind, that is without having formed certain theories, the wave concept

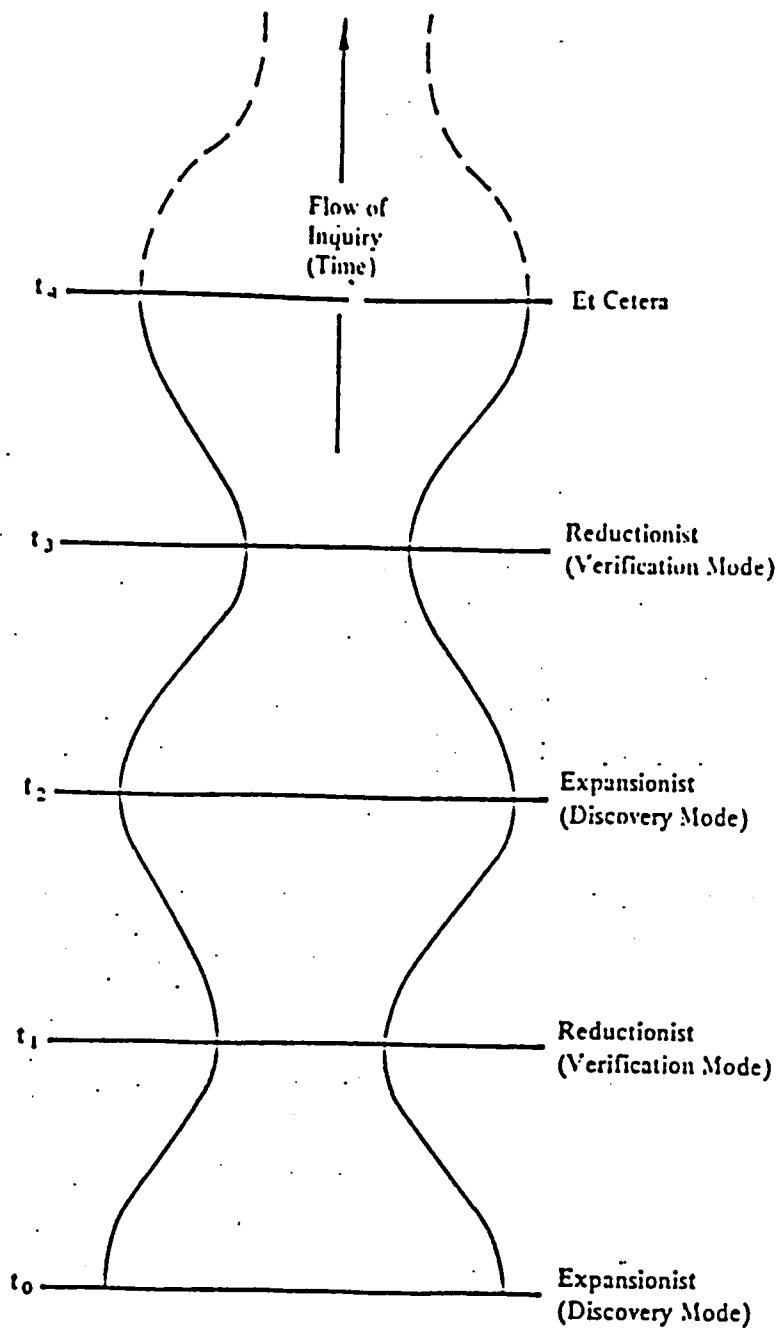


Figure 1. A "Wave" Conceptualization of Naturalistic Inquiry, Guba, Egon, G. Toward a Methodology of Naturalistic Inquiry in Educational Evaluation, Los Angeles, University of California, 1978, 7.

suggests that insistence on a conceptually blank approach may be inappropriate (Guba, 1978).

A listing of several descriptors of naturalistic inquiry served as a guide to this study.

- A. The naturalistic inquirer is concerned with describing and understanding social phenomena.
- B. The naturalistic investigator begins his work with as open a mind as possible, immersing himself in the investigation.
- C. The naturalistic inquirer's purpose is the discovery of phenomena, the expansion and testing of which would be worthwhile.
- D. Emergent, variable designs are a part of naturalistic inquiry. The design can be given in advance only in an incomplete state because the constraints would change the nature of the research mode.
- E. Naturalistic inquirers likely have a flexible view of reality, considering that the view of reality changes from subject to subject. Thus, the naturalistic inquirer seeks a multiple reality.
(Guba, 1978, 12-15).

The preceding descriptors have been employed in the design of the methodology for this study. The following application of the descriptors should provide clarification.

Philosophical Base. The research has been primarily aimed at description and understanding. Qualitative research is interpretive research. (Smith, 1983) No hypotheses have been advanced or tested; rather data have been sought widely with no anticipated outcomes a priori.

Verification. Triangulation has been used; i.e., the checking of one piece of data against another, seeking the most "real" of the multiple realities generated by numerous data sources. Also, concurrent validity, comparing interview responses with official records, has been employed. (Gorden, 1980)

Mode. Data have been collected in an eclectic manner. Personal interviews with key actors, minutes of meetings, budget documents, newspaper articles, teacher, and student surveys are among the sources of data.

PROCEDURES

In this case study of the consolidation of the Alleghany County and the Clifton Forge City school systems, interviewing was one of the most frequently used data gathering techniques. Much of the data analyzed in answering research question #4, "How did patrons and the community respond to the merger?" and research question #5, "What changes in education were apparent following the merger?" came from interviews of key actors, a sociometric technique

popularized by Floyd Hunter (1953). Hunter developed the reputational approach to the study of power. In his Regional City Study, Hunter had a panel of judges select the top ten civic, governmental, business, and status leaders from a list which had been generated by a group of people knowledgeable about the community. This method has been validated as a means for designating individuals as key actors in decision-making positions (Kimbrough, 1964).

Ralph Kimbrough, perhaps the best known researcher of power in education, used the reputational method in his Beach County Study. The method of nominating key influentials resembled the sociometric method used by Helen H. Jennings and J. L. Morener (Lutz and Iannacone, 1969). Kimbrough found that power or influence often has been exerted informally by those who do not occupy positions of power and that often a sub-power group with significance surfaced (Kimbrough, 1964).

INTERVIEWS

Interviewing is a valuable method of obtaining data when people's beliefs, attitudes, values, knowledge, or any other subjective orientation or mental content are the data desired. The exploratory value of the unstructured interview is seen in the opportunity to formulate new questions and to probe for clarifications (Gorden, 1980). "Word descriptions

reveal a wealth of enlightening information that a quantitative study might not be able to produce" (Van Dalen, 1973, 84). The researcher is alert to detect the inter-dependency of relationships, nonverbal actions, unspoken understandings, and covert or informal networks.

By combining the open-ended interview and the informal conversational interview types, the researcher was able to collect much data and to gain considerable insight into the consolidation process and the key actors involved. The research combined creative thought and working with people to obtain their help. The researcher had to be flexible as many situations had to be "played by ear" (Douglas, 1976).

Tests for concurrent validity were performed by comparing interview response with official records. Weiss, in a study of response error among mothers receiving welfare assistance in New York, checked the mothers' statements against the official records (Weiss, 1969). In a similar situation, Steinkamp compared the statements of his respondents regarding the size of their bank accounts with the banks' records (Steinkamp, 1966).

INTERVIEWS WITH KEY ACTORS

Two sets of interviews provided valuable sources of data for this study. The first set of interviews took place in December 1984, three years following the formal consolidation

of the two school systems and two years following the actual merging of students at Clifton Middle School and at Alleghany High School.

Wayne Worner, a consultant from Virginia Tech, and a team of four others conducted interviews with 24 key actors (See Appendix G). The key actors were people who had had important roles in the early stages of the process. The list was generated by Pace, Superintendent of Schools, at the request of Worner.

The purposes of the interviews were to

1. review the effects of the merger and to gather comments as to whether the merger had been a success or a failure, and
2. solicit evaluative input data from knowledgeable community representatives in relation to quality of education, cost/quality comparisons with other similar school divisions, and suggested changes in resource allocations (Worner, 1984).

A set of procedures was established to assure consistency in the interview process (See Appendix H). A debriefing session followed the interviews, at which time the team members synthesized and summarized the interviews (Worner, 1985). Summarizing statements appear in Chapter 5.

The reputational method of nominating key actors, promoted by Hunter and Kimbrough, was used to determine the

key actors in the consolidation process for interviews conducted by the researcher for this study during the period from 1985 through 1987. The superintendents and the school board chairmen from Alleghany County and from Clifton Forge generated lists of ten people they believed to be most important in the consolidation process. From the four lists anyone whose name appeared on at least two lists (17) was contacted for an interview.

The 17 key actors (Appendix I) fell into five distinct groups: the school superintendents, school board members, governing body members, governing body administrators, and citizens. Two key actors declined requests for interviews: Russell Smith, Clifton Forge councilman who had abstained when the consolidation vote was taken, and Randy Arno, former County Administrator who had left the area.

A set of 14 interview questions (See Appendix J) was used to assure consistency across interviews. With the interviewees' permission, the interviews were taped. The summary statements, synthesized from field notes and transcriptions, appear in Chapter 5. An individual's remarks have not been attributed to protect anonymity.

The interviews took place from 1985 through 1987. Most of the interviews took place in Covington; in addition, several interviews were completed in Clifton Forge, one interview was taped and mailed from Charleston, South

Carolina, and one interviewee preferred to submit written answers to the interview questions because of his erratic schedule.

The interviews have been summarized under the following headings: the environment leading to consolidation; the goals of consolidation; the roles and relationships of superintendents, school boards, governing bodies, and the Virginia Department of Education; surprises in the process; results of consolidation; future governmental consolidation; and school consolidation with Covington.

STUDENT AND STAFF SURVEYS

Survey instruments were the vehicles which provided much of the data used to address research question #1, "What happened to students in the merger process?", research question #2, "What were teachers' perceptions about the merger?" and research question #5, "What changes in education were apparent following the merger?"

The High School Survey

The High School Survey (Appendix K) was developed to provide a means for measuring students' views of their high school experiences and their high school in general. Professor Wayne Worner of Virginia Tech developed the original instrument in 1980. It was subsequently modified

by Worner and Dennis Hinkle, also a professor at Virginia Tech, in 1981.

The forty item instrument offered students the opportunity to choose one of six responses which best described his/her agreement with each item. The items dealt with curriculum issues, climate issues, participation issues, instruction, and teachers. Students responded to the High School Survey in May of three consecutive years 1983, 1984, and 1985. Students in grades 8-11 responded the first year, students in grades 9-12 the second year, and students in grades 10-12 the third year. Thus, only students who had been in both systems (separate and consolidated) participated in the survey. Responses of students from the two high schools were kept separate throughout.

The High School Survey was administered in English 8-English 11 classes at Clifton Forge High School and at Alleghany County High School in May 1983. In the subsequent two administrations (May 1984 and May 1985), English classes again provided the locus operandi, providing access to all of the students involved in the study.

Copies of the High School Survey were color-coded to assure that student responses from each school would be attributed correctly and to separate the responses by year of administration. The responses were analyzed using the

facilities of the Virginia Tech Computing Center with the SPSSX program.

Cross tabulations were run for each of the forty items by school (Clifton Forge High School and Alleghany County High School) and by years (1983-1985). The number and percentages of responses for each completer, strongly agree, agree, tend to agree, tend to disagree, disagree, and strongly disagree, were reported.

Annual Teacher Survey

During each of the three years of this study, 1982-1985, all teachers had the opportunity to indicate their attitudes on an instrument designed to measure morale. The 25 item instrument was designed by Wayne Worner, external evaluator for the staff development pilot study which ran concurrently with the period of time covered in this study.

With each of the 25 items on the Teacher Survey, the individual had the opportunity to mark one of six responses which described his/her school and the school division. In the first year of administration of this instrument, any mean score below "3" for a school or the division was defined as an area of concern. In the two succeeding years, any score which varied by .5 from the previous year's score was examined. (See Appendix B for a copy of the instrument.) Summary statements appear in Chapter 5.

ARCHIVAL MATERIALS

A vast range of material was examined to corroborate perceptions of the interviewees. Minutes of school board meetings, newspaper articles, policy statements, the Peabody Study, Facing Up, and summary and evaluation materials from the staff development pilot study yielded important data which was used to verify information gathered through the interview process. The print material helped resolve differences in remembrances of precise information such as the date on which a given activity occurred.

TRIANGULATION

The use of multiple methods, each to cross-check and supplement the others, is called triangulation (Gorden, 1980). Denzin defined triangulation as "the combination of methodologies in the study of the same phenomenon" (1978, 35). Various methods give totally different kinds of information that can supplement each other, as how to interpret some of the information is not known unless it can be coupled with other information or because a cross-check is needed to verify the validity of observations (Gorden, 1980). Denzin (1971) observed

Triangulation forces the observer to combine multiple data sources, research methods, and theoretical schemes in the inspection and analysis of behavioral specimens. It forces him to situationally check the validity of his causal propositions . . . It forces him to temporarily

specify the character of his hypothesis . . . It directs the observer to compare his subject's theories of behavior with his emerging theoretical scheme . . . The naturalist must have an intimate familiarity with all his data sources so he can judge which ones to discount, which ones to treat as negative cases, which ones to build into his representative cases. (177)

Webb et al, (1966) concluded that triangulation makes data and findings believable:

Once a proposition has been confirmed by two or more measurement processes, the uncertainty of its interpretation is greatly reduced. The most persuasive evidence comes through a triangulation of measurement processes. (3)

When a series of bits of evidence tend in some direction, there is far greater credibility ascribed to the direction. As statistical means are more stable than single scores, triangulated conclusions are more stable than are any of the vantage points from which they were triangulated (Guba, 1978).

Summary

In this chapter the research methodology employed in the conduct of the study was discussed. The techniques were chosen for their facility in deriving answers to the five research questions.

Three primary sources of data were described: personal interviews of key actors, surveys of students and staff

members over a three year period (1982-1985), and archival materials.

Methods of naturalistic inquiry were discussed: the attempt to reconstruct a given case as accurately as possible by investigating and discovering, by advancing hypotheses, and by verifying. Triangulation was defined as a means to check one piece of data against another; triangulation brings credence to data and findings. The reputational method of selecting key actors was addressed.

CHAPTER 4

THE EARLY DAYS OF THE CONSOLIDATED SYSTEM

INTRODUCTION

A description of the early days of the consolidated Alleghany Highlands Public Schools is found in Chapter 4. The description begins with the first meeting of all merged instructional personnel in one body.

During the first year of formal consolidation, no students or teachers were affected. Preparation for merging pupil and staff personnel was the focus. Preparatory activities carried out during 1982-83 are described under the headings of governance, administration, finance, educational programs, transportation, and personnel.

On August 25, 1982, S. John Davis, Virginia's Superintendent of Public Instruction, was the speaker for a celebration of consolidation when the staff met as a body for the first time in the auditorium of Alleghany High School. "It was more like a party than the opening of a school system, . . . and everyone smiled" (Roanoke Times, August 26, 1982). Pin-on badges bearing the inscription, "One + One = 'A' No. 1," were handed to everyone at the front doors of the school. Helen Kostel, Board Chairman, and Mark Pace, Superintendent, greeted the gathering of personnel. Pace remarked that there was "something special about this day and time." He

continued, "I hope you share my special excitement" (Roanoke Times, August 26, 1982).

Davis reminded the assembly that they "were going to be living in a fish bowl because the eyes of the rest of the state would be upon the Alleghany Highlands to see whether consolidation works." Davis observed that "those involved in the merger will long be remembered for [their] courage and determination" (Roanoke Times, August 26, 1982). Following Davis' remarks, wedding cake and punch were served in the cafeteria. The media had often compared the merger to a marriage, hence the wedding cake.

Significant effort on the part of many people was necessary to begin operation of the Alleghany Highlands School Division. Questions regarding school colors, mascot, school names, assignment of personnel, curriculum, organizational pattern, and transportation required the time and talents of many people. The political arena was potentially volatile as each side protected its turf in the deliberations. Citizens of both communities served on each committee until the issues were resolved (Appendices M, N).

Communication was especially important during those early days. Great care was taken to assure that all citizens, personnel, and students knew what was happening. All seventh grade students visited Clifton Middle School for a day. Groups of upper grade students from Clifton Forge

High School visited Alleghany High School. Some clubs and other extra curricular activities began to involve the current officers and leaders from both schools in planning for the 1982-83 year (Appendix D). The adage that "communication is the beginning of understanding" was practiced. Trust evolved as relationships developed.

In the first year, central administration was consolidated while the individual schools operated much as they had previously; however, they were preparing for the following year when the system would truly be one.

A pilot study, funded by the Virginia Department of Education from 1982 to 1985, provided staff development for administrators and teachers. The first retreat for administrators and supervisors was held on August 19, 1982, at a nearby lake, to begin the real melding of this staff. Monthly staff development programs continued for the administrative and supervisory group over the three-year period.

Teachers were concerned because pending changes were beyond their control. They had questions such as whether they would remain in their current schools or be moved to the "Big House," as Alleghany High School became known. The downward communication process worked well though; teachers were kept informed and became a part of the melding, too. A survey instrument, administered as part of the pilot study,

is still used to monitor teacher morale and teacher perceptions across the school division (Appendix L).

GOVERNANCE

Prior to merger, both the Alleghany County and the Clifton Forge school divisions were governed by five member boards appointed by the governing bodies. The board members served four year terms with staggered termination dates. Clifton Forge members were appointed at large while Alleghany County School Board members were appointed from each of the five magisterial districts of the county.

The Alleghany Highlands Board began operation with nine members; over two years the number of Clifton Forge representatives was reduced to three while the county representation continued at five, reflecting the proportion of population in the jurisdictions (Appendix P). Mrs. Helen Kostel was chosen to serve as the first chairman of the Alleghany Highlands School Board after having served as chairman of the Alleghany County School Board and of the Joint Board to plan for consolidation.

ADMINISTRATION

Two major policy directions were established in meetings of the consultants and combined school boards. They were:

1. The merger plan should provide for continuing employment of all personnel currently employed

by the two school divisions at least through the first year of the merger with any economies due to personnel savings to be realized through attrition rather than reduction in force as a result of merger. This policy position does not prohibit reduction in force as a result of continued enrollment decline or economic constraints.

2. That legal merger would be proposed for July 1, 1982, but that merging of the student population would be delayed until the 1983-84 school year (Merger Plan, November 1981).

Both systems operated under a K-7 and 8-12 organizational pattern. Central office administration was handled by a small number of people in each system. Alleghany County had one administrator and one supervisor assigned to instruction with a broad range of responsibilities (see Figure 2). There was a supervisor of special education in each system. Both systems had a clerk who worked with personnel and financial matters. Alleghany County had a building level food service system, operated a large transportation service and a maintenance department. Clifton Forge had a centralized food service operation, offered minimal transportation services, and employed no maintenance personnel (see Figure 3). Nearly all maintenance services in Clifton Forge were provided on a contract basis (Merger Plan, November 1981).

In the merged system, an Administrative Assistant was assigned to handle transportation, vocational education, and maintenance (see Figure 4). The Director of Instruction was

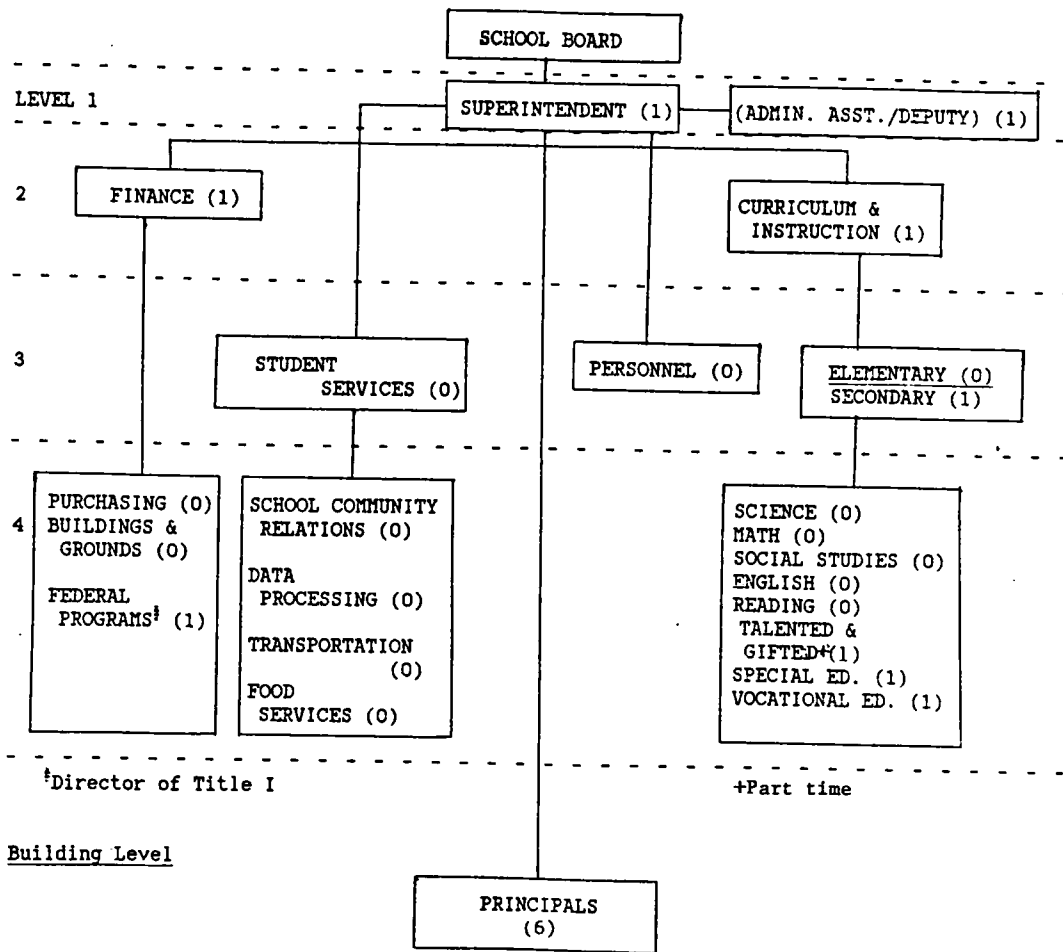


Figure 2. Illustration of Administrative Positions in the Alleghany County School System

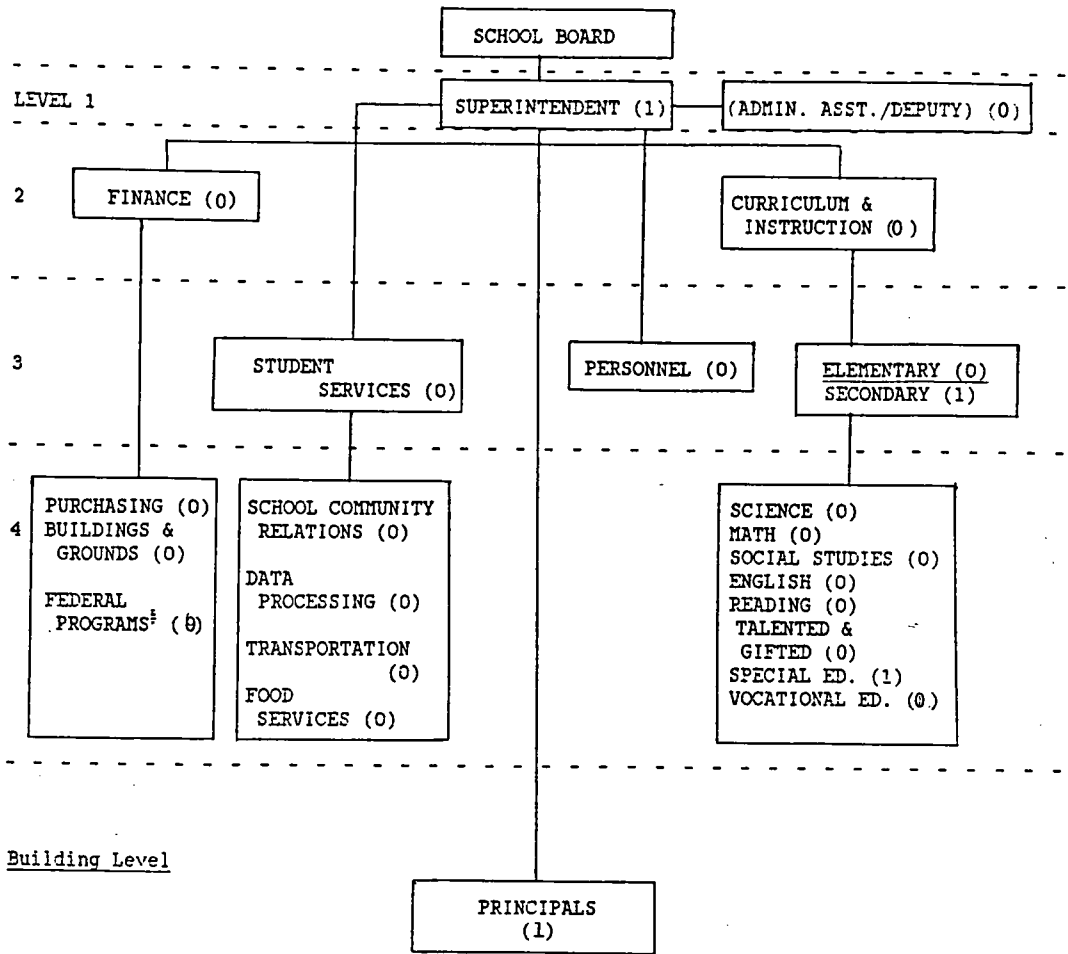


Figure 3. Illustration of Administrative Positions in the Clifton Forge City Schools

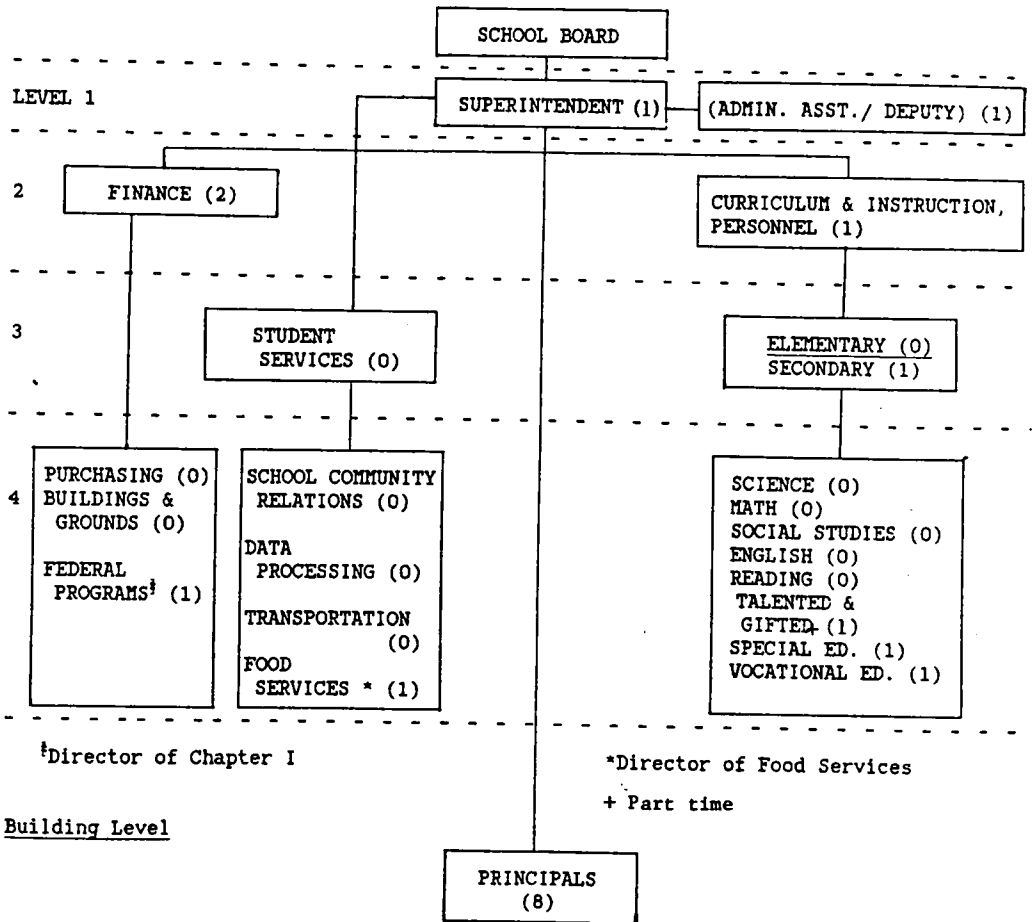


Figure 4. Illustration of Administrative Position Development in the Allegheny Highlands School System

to become Director of Personnel. The Supervisor of Special Education in Clifton Forge took a job in another state. The Superintendent of Clifton Forge Schools, who was hired to engineer school division consolidation, left the division as planned. No one among the instructional staff or support personnel was unemployed as a result of consolidation.

The administration of schools came under one Board during 1982-83. The schools, however, operated much the same as they had prior to the merger. The exception was a flurry of activity at the central office. Topics which were addressed included the adoption of a policy manual and the relationship of the new Board and superintendent. Further, the transportation system, the instructional program, staffing, support services, food services, common bookkeeping procedures, and a teacher evaluation system were areas which received attention.

A teacher evaluation system for the Alleghany Highlands Public Schools was planned during the first year of merger and adopted in October 1983. A committee of teachers, administrators, and central office personnel was carefully chosen to represent all schools and both of the former school systems. The committee spent many hours to complete a task which was a sensitive one. The evaluation plan was implemented in November 1983. Minor revisions were completed in August 1984.

FINANCE

Prior to merger school budgets in both Alleghany County and Clifton Forge had been prepared in basically the same manner. The Superintendent and staff prepared the budget; the School Board approved it; and it was submitted to the Board of Supervisors or the City Council respectively for inclusion in the jurisdiction's budget.

The governing bodies set tax rates to finance the local portion of the approved budget. State and federal funds provided the remainder of the budget. State aid was based on the cost to provide a basic program as defined through the Standards of Quality (SOQ).

In 1982 a governmental unit's ability to pay was represented by its composite index. The composite index was computed by applying a weight of 50% to the local true value of real property, a weight of 40% to the local personal income, and a weight of 10% to the local taxable retail sales. By summing the weighted ratios of local true value of real property, the local personal income, and the local taxable retail sales, the school division's composite index was determined. The composite index indicated the amount of the funding for the Standards of Quality which the governmental unit would bear. For the 1980-82 biennium, the composite index for Alleghany County was .2894 which meant that the State's share of SOQ funding was approximately 71%

(1.000-.2894), and Alleghany County's share was approximately 29%. Clifton Forge's composite index was .4302 with the State's share approximately 57% of the SOQ funding (1.000-.4302) and Clifton Forge's share being 43% (Department of Education, Office of Planning and Evaluation, March 1981).

The State Code included no provision for averaging the composite indices for two school systems. The consultants recommended that steps be taken to petition the General Assembly for incentive funding for newly consolidated school divisions (Merger Plan, 1981). Senator Dudley Emick did, indeed, sponsor legislation which resulted in the receipt of financial incentives based upon computation of the merged district's composite index at the Alleghany County rate (Interview with A)

The consultants also recommended that the debt service of each school board be transferred to the respective governing bodies for retirement. Therefore, the new school division would have no debt service at the initiation of consolidation (Merger Plan, 1981).

Further, the consultants recommended that the cost to each governmental unit be apportioned on a per pupil cost basis to be based upon the number of students served by the two jurisdictions. The consultants stated "that fiscal merger should be as complete and equitable as possible with

as few special exceptions and conditions as possible" (Merger Plan, 1981).

In spite of that recommendation, a different funding formula was developed. The formula was based on five factors for each locality: the value of real estate, personal income, the number of pupils, the local retail sales tax collected, and the ratio from the year before. Figures for each factor were tallied and a determination made of the percent of the total each locality would be required to pay. (For additional information, see Table 13.)

FACILITIES

Alleghany County operated five elementary schools prior to merger. Central Elementary and Falling Spring Elementary had undergone recent remodeling; Callaghan Elementary and Shason Elementary opened in 1964, and Boiling Spring Elementary, an open space building, opened in 1975. Alleghany High School opened in 1963 and has undergone extensive remodeling of the first floor on two occasions.

The buildings in Clifton Forge were much older, but some renovations were underway at Elementary West. Elementary East was adequate with the continued use of the eight modular units. Clifton Forge High School opened in 1928 and could house all of the eighth graders in the merged system. The exchange of Clifton Forge students in grades 9-12 for all of

the merged eighth graders was about an even number. Thus, housing for all students in the system was adequate.

The consultants' recommendations regarding facilities were followed. All elementary schools operated as they had; Clifton Forge High School was renamed Clifton Middle School and housed all eighth graders; Alleghany County High School became Alleghany High School for all students in grades 9-12.

EDUCATIONAL PROGRAMS

Enhancement of the instructional program, especially for students from Clifton Forge High School, was one of the primary selling points of the pro-consolidation coalition. Dwindling enrollments would soon have affected the richness of the curriculum at Alleghany High School as well (Appendix Q).

A second improvement in the educational program was the inclusion of the middle school. Commitment to the middle school concept influenced the reorganization of schools into grades K-7 in six schools, grade 8 in one school, and grades 9-12 in one school. The instructional program at Clifton Forge Middle School (CMS) evolved from discussions of what is best for students. Given the constraints of space and transportation, Clifton Middle School was able to house only one grade of students. Internalization of the middle school concept for those who would teach at CMS was accomplished,

in part, with pilot study funds for staff development. Thomas Gatewood, a national consultant on middle schools, worked with the teachers and administrators in this effort. The staff spent five days in June of 1983 preparing curriculum, becoming familiar with texts and materials, and fine-tuning their approaches to the instruction of the middle school student.

Two curriculum committees, composed of teachers, patrons, and other citizens from both committees, worked during the fall of 1982 to determine the course offerings for 1983-84 at Alleghany High School and at Clifton Middle School (Appendices R, S). After careful consideration of the two existing courses of study and some heated discussions, the curriculum for 1983-84 was announced to the public on December 30, 1982, in an insert in The Alleghany Highlander, a weekly which is mailed to every address in the school system service area. It has continued to serve as an announcement to the public of the courses the schools offer and as a reference for students in the course selection process.

Clifton Middle School began operation on a seven period day. A "wheel program" was compulsory for all students except those enrolled in band and a full-year course in a foreign language. The 1983-84 "wheel" was comprised of computer literacy, study skills, home economics, shop, French

or Spanish, and art. A total of 25 courses was offered at the middle school.

The following courses were added to the curriculum for students at Clifton Middle School: Algebra I super challenge, Science 8 super challenge, English 8 super challenge, Latin I, semester courses in mythology, drama, creative writing, art, Virginia history, electricity, metals, drafting, typing, business exploration, and the wheel.

A student was to complete eighth grade course work at the middle school; only courses for grades 9-12 were to be offered at AHS. Ninety-two courses were offered at Alleghany High School compared with 85 courses during the previous year (See Chapter 6 for further discussion and Appendix N for a breakdown of course enrollments).

The following courses were added to the curriculum at Alleghany High School as a result of the merger: Latin I, Latin II, industrial drafting, great books, economics, professional art development, record keeping, Biology II, Chemistry II, modern foreign languages (Russian/German), Advanced English 10, Advanced English 11, business math, consumer math, computer science, and wood technology ("Curriculum Directory," Daily Review, December 1982).

Healthy rivalries in the extracurricular program in athletics had always existed between students from Alleghany and Clifton Forge high schools. Much speculation was voiced

about how many fights would occur on the first day of classes at the consolidated high school. There was not a single fight, to the disbelief of many people.

The smooth opening of school in the fall of 1983 did not happen by chance. Again, much time and effort had been spent in helping students make transitions. Randolph Scott, principal of Alleghany High School and of the former county high school, developed an elaborate plan for assisting students and teachers to accept change (Appendix 0). Helen Kostel (Interview, 1985) praised Scott for his leadership role. In turn, Scott (Interview, 1985) praised the faculty for their warmth and reaching out to all of the students.

TRANSPORTATION

Alleghany County transported approximately 80%-85% of its students prior to merger. Clifton Forge provided transportation for certain special education students and for students traveling from the high school for instruction at Jackson River Vocational Center.

The merged system had the choice of busing as the two separate systems had previously with the addition of busing county eighth graders to the middle school and city students in grades 9-12 to the high school or of providing bus transportation to all students (K-12). The latter was chosen to provide equity in the minds of all people in the

communities. This task was accomplished without adding additional buses to the fleet (Interview, Sam Cook, 1985).

PERSONNEL

Aside from the people who made the decision to consolidate, those best positioned to support or undermine consolidation were the personnel in each school division. Many people were suffering from the insecurity of wondering what would happen to them and their jobs. Teachers from Clifton Forge felt that they would not have a job or that they would be "swallowed" by the larger system, or assigned with no regard for their preferences. Groups of whispering people were often visible before school began for the day.

Discussions about personnel needs began early in the fall of 1982. Forms to ascertain preferences of teaching assignment and location were distributed in October 1982 (See Appendix J.) Communication flowed from the Superintendent and Director of Personnel to allay the fears which were quite obvious. The staff was told that no one would lose a job because of consolidation; natural attrition would take care of any excess personnel. School employees seemed genuinely pleased that their employment was secure even if a specific position was not.

No longer was there a need for two high school principals, two clerks of the Board, two head football

coaches, two English department heads, etc. (Appendix N.) All such jobs were advertised. People interested in a particular assignment applied and preceded through an interview process administered by the Director of Personnel. The Board made appointments based on recommendations from the superintendent. The determination of the number of personnel assigned to administer the system was an educational decision (Interview with A).

Contracts were issued for the 1982-83 term by each school division to its on-staff personnel. On July 1, 1982, the new school division ratified the contracts which the former school divisions had issued. Adjustments to equalize salary and benefit provisions of the two school systems amounted to less than five percent of the total expenditures for personnel. The greatest problems in this area were in the structure of salary and benefits programs for administrators and classified personnel and in the differences created by a variety of special conditions attached to certain positions of classified personnel (Merger Plan, 1981).

Summary

Chapter 4 describes the early days (1982-1983) of the consolidated Alleghany Highlands Public Schools. The consolidated system began operation as of July 1, 1982. For

the first year, changes were hardly visible in the schools; no students or staff changed locations until the 1983-84 term. At that time all students in grade 8 were assigned to Clifton Middle School, formerly Clifton Forge High School; and all students in grades 9-12 attended Alleghany High School, formerly Alleghany County High School. Some changes in the location of staff members within the two schools occurred as well.

During the 1982-83 term, planning for the actual merger of students and teachers took place. Among the issues faced that year were organizational pattern, staffing, policy statements, and curriculum. Concerns discussed in this chapter were governance, administration, finance, educational programs, facilities, and transportation.

CHAPTER 5

FINDINGS

Organization

This chapter begins with a description of the pre-merger environment and continues with a discussion of several issues following merger. Specific data addressing the five research questions are provided. Interviews are summarized under the following headings: the environment leading to consolidation; reasons for consolidation; the goals of consolidation; the roles and relationships of superintendents, school boards, governing bodies, and the Virginia Department of Education; surprises in the process; and results of consolidation.

Two survey instruments have provided a large amount of information which has been used to address the research questions. One survey instrument was the High School Survey (Appendix K); the other was the Annual Staff Survey (Appendix L). Each instrument was designed to elicit opinions about school and/or school system issues.

Budget files provided important data about the financial considerations of the merger. Newspaper articles offered additional collaborating data.

Consolidation of area school divisions has been a topic of conversation since World War II. Economics and declining

enrollments stimulated new discussions on the topic in the late 1970's. In Mark Pace's initial interview with the Alleghany County Board in 1977, he was questioned about his background in negotiating with multiple school divisions and governing bodies. In the adjacent Clifton Forge School Division, Martin Loughlin was hired as superintendent (1980) for the express purpose of engineering consolidation with Covington or Alleghany County or both (Interview with E).

In mid-winter 1978, Leonard Switzer came to Pace to state that Jim Laughlin, Covington's superintendent planned to step down from the superintendency and that the Covington School Board wanted to discuss consolidation. The Alleghany School Board believed at that time, that total consolidation (governmental) was necessary in order for school consolidation to be successful (Interview with E).

During the period of 1978-1980, the Clifton Forge School Board experienced a great deal of upheaval concerning the performance of their superintendent. A lengthy court case consumed much of the board's energy over a twenty-six month period. Some Clifton Forge School Board members had begun to think about the possibility of consolidating with either the Alleghany County or Covington schools, if they were left without a superintendent as a result of the legal proceedings. It could be a golden opportunity, they thought, because they believed that having to dismiss a satisfactory

superintendent or having to demote one would be an obstacle which would diminish the possibilities for consolidation early in the process (Interview with C).

The Clifton Forge superintendency did become vacant. The Clifton Forge School Board met with Frank Cosby (1980), Superintendent of the Covington System, to discuss contracted services. He suggested that the Board contact Kenneth Underwood of Virginia Tech. Underwood recommended that the Board employ Martin Loughlin as interim superintendent. Loughlin was hired on a per diem basis until October when he was named interim superintendent (Interview with C).

During this same summer (1980), economic disaster struck the Alleghany Highlands. Hercules had a fire which resulted in the loss of jobs for 700 people. Back Creek, the Virginia Power pump storage project, laid off 2300 employees, an event which greatly contributed to the 13% unemployment rate in the Highlands. In part, because of dire financial conditions in the area, the Chamber of Commerce provided a forum for discussion of consolidation of schools in Clifton Forge, Covington, and Alleghany County. By the first of October, Covington bowed out of the discussions and rumors of annexation surfaced again (Interview with A).

Reasons for Consolidation

In the fall (1980) the Alleghany County Supervisors and the Clifton Forge City Council, with two members absent, met at Smith Mountain Lake for a retreat funded by the Commission on Local Government (COLG). The group spent Friday through Sunday discussing the possibilities of consolidation (Interview with G).

The idea of school consolidation seemed feasible. Pace and Loughlin continued meetings throughout the winter and into the next fall. During this time, the school boards began holding regular joint sessions with Helen Kostel as chairman (Interviews with A, B, and D).

The declining tax base and a large number of senior citizens in Clifton Forge, the declining enrollments in all schools, the desire to maintain quality educational programs, and the threat of annexation by Covington, contributed to the progress toward consolidation. Other contributing factors were the county's need to show good faith cooperation to win an annexation case should an annexation suit be brought by Covington before the Commission On Local Government; Clifton Forge's need for a permanent superintendent and a way to operate schools more efficiently; and the county's need for a renewed contract with Clifton Forge for water (Interviews with A, B, C, D, and G).

THE GOALS OF CONSOLIDATION

The goals of school consolidation were expressed in nearly the same words by each interviewee. Providing quality education more efficiently was the goal most often cited. Additionally, goals included better use of personnel, slowing the rate of tax increase in local tax dollars spent for education, and meeting the requirements of the Standards of Quality.

One councilman told of a high school teacher of specialty subjects, at the top of the scale and with a master's degree, who taught thirty-six students all day. "Now, that's not the way to get your money's worth," he said (Interview with F).

There were other political goals, also. Covington had threatened to pursue annexation off and on for some time. The County needed to be able to prove that it was making efforts to work cooperatively with other area jurisdictions in order to protect itself in the event Covington did pursue the matter. In fact, Covington later did pursue annexation and the Commission on Local Government ruled in favor of the County (October 1984) (Interviews with A and G).

The amount of water sold by Clifton Forge to the County and the rate per gallon were considerations which two interviewees discussed. The County needed city water; thus water was an asset which Clifton Forge held. According to

one interviewee, the water deal was made by one individual from the Council and one from the Supervisors, without the knowledge of the total group (Interviews with F and G).

The Roles and Relationships of Governmental Officials

Both Mark Pace, Superintendent of Alleghany County Schools and Martin Loughlin, Superintendent of Clifton Forge Schools, worked closely with their respective boards as consolidation talks progressed. They also maintained close connections with their governing bodies (Interview with B).

S. John Davis, State Superintendent of Public Instruction, supported the concept of consolidation. He wrote to Senator Dudley Emick to express his support of Emick's efforts to gain financial incentives for consolidation through the legislature (Interview with A). Davis was the keynote speaker during the first consolidated pre-school staff development activities in August 1982 (Roanoke Times, August 26, 1982).

Trade-offs in the Consolidation Process

There were various opinions expressed concerning trade-offs connected with the consolidation process. One trade-off cited dealt with city water. Alleghany County buys water from Clifton Forge, and the water contract was coming up for renewal. A Board of Supervisors member stated, "We

were supposed to get water, and it did not come about" (Interview with G). Richard Flora, Clifton Forge City Manager, used the water contract as a lever or catalyst to speed the process by stating that ". . . if we have cooperation with water, we must have cooperation with schools" (Interview with G).

Other types of trade-offs are represented by the retention of the mascot from Clifton Forge, the Mountaineer, and a change in garb from hillbilly clothing to buckskins. The Alleghany colors were maintained, a decision which likely saved \$50,000 (Interview with A).

What Happened to Students in the Merger Process?

"What happened to students in the merger process" is the research question listed first in Chapter 1. Key determiners of how the Alleghany County - Clifton Forge merger worked were the students. To ascertain student opinion, the High School Survey (Appendix K) was administered each year from 1982-83 when students were enrolled in their original schools through 1984-85 when students had been merged at Alleghany High School for two years. The instrument was color-coded to designate the original residency of the students throughout the research period. In the spring of 1983 students in grades 8-11 completed the instrument; in 1984 students in grades 9-12 completed the instrument, and in 1985

students in grades 10-12 completed the instrument.

Therefore, only the opinions of students who had been in the pre-consolidated school divisions completed the survey.

The High School Survey is a forty item instrument designed to determine how students view their high school. Students marked one of six possible responses; strongly agree, agree, tend to agree, tend to disagree, disagree, or strongly disagree. The items are grouped under the headings of program and curriculum issues, teachers and instruction, school climate, auxiliary services, and administration. In Tables 1-6, items from the survey are arrayed, representing the opinions of students from the first year of consolidation when students attended the two unmerged high schools through two years which they attended together at Alleghany High School. The mean response for the answer categories of strongly agree, agree, and tend to agree have been reported. Differences of ten percent or more in opinions expressed in 1983 as compared with those expressed in 1985 have been deemed of importance and are discussed. Also, a ten percent difference between the two groups in 1985 is discussed in the narrative which follows.

Responses by students from Clifton Forge High School (CFHS) in 1983 and in 1985 to item 1, "There are enough courses and programs offered at this school to meet the needs of students who plan to go to a college or university," show

Table 1

Student Responses to Program and Curriculum Issues in
Allegheny Highlands High Schools, 1983-1985

ITEM	YEAR	AHS (N)	PERCENT AGREE CFHS (N)
1. There are enough courses and programs offered at this school to meet the needs of students who plan to go to a college or university.	1983	83.7 (388)	75.8 (223)
	1984	72.4 (751)	89.4 (150)
	1985	83.5 (375)	93.5 (92)
6. There are enough vocational programs available to students of this school to meet the needs of those who want to prepare for work right after school.	1983	75.7 (384)	80.1 (221)
	1984	74.9 (741)	85.3 (149)
	1985	77.3 (375)	78.9 (90)
11. There are enough special education programs and services at this school to provide for the students here who need those services.	1983	78.3 (372)	86.8 (220)
	1984	68.1 (688)	86.1 (143)
	1985	78.5 (371)	80.0 (91)
21. What is learned at this school will be useful to the students later in life.	1983	77.5 (382)	94.5 (223)
	1984	79.4 (708)	89.4 (150)
	1985	81.1 (370)	84.7 (91)

a difference of 17.7% (see Table 1). One of the basic tenets upon which the merger was based was that of increasing course offerings for all students, but especially for students from the smaller CFHS. Of interest is the 10% difference shown between the opinions of students from Alleghany High School (AHS) as compared with those of students from CFHS in 1985, with the CFHS opinions being the higher percent. Students from AHS had been accustomed to a wider array of courses and were probably not impressed with the addition of new offerings.

Another notable difference is seen in Table 1, item 21, "What is learned at this school will be useful to the students later in life." There is a 9.8% decline in the opinions of students from CFHS in 1985 compared with their responses in 1983.

Important differences in opinion for each item are displayed in Table 2. The "halo" effect very likely is detectable in the 1983 CFHS expression of feelings or beliefs about an alma mater which would soon cease to exist.

A 22.4% decline is shown in the opinions of students from CFHS from 1983 to 1985 for item 3, "Punishment is the same regardless of who breaks the rules." For item 4, "Teachers here care more about good students and have less time for those who are less able," a 20% difference is shown from 1983 to 1985 in the opinions of CFHS students while an

Table 2

Student Responses to Climate Issues in
Allegheny Highlands High Schools, 1983-1985

ITEM	YEAR	PERCENT AGREE	
		AHS (N)	CFHS (N)
3. Punishment is the same regardless of who breaks the rules.	1983	38.0 (390)	55.4 (222)
	1984	32.6 (749)	41.1 (151)
	1985	36.6 (377)	33.0 (91)
4. Teachers here care more about good students and have less time for those who are less able.	1983	52.7 (389)	80.2 (223)
	1984	55.6 (748)	64.3 (151)
	1985	60.7 (377)	60.2 (93)
5. This school is a friendly place.	1983	78.3 (382)	92.7 (222)
	1984	73.9 (749)	78.8 (151)
	1985	78.1 (374)	71.0 (93)
10. Most students treat other students with respect at this school.	1983	59.4 (382)	74.8 (222)
	1984	49.7 (719)	63.6 (151)
	1985	61.2 (373)	57.6 (92)
15. Students really feel like they are a part of this school.	1983	65.4 (381)	89.6 (222)
	1984	66.6 (721)	63.6 (151)
	1985	68.1 (373)	58.7 (92)
24. Students are proud of this high school.	1983	76.8 (379)	96.4 (223)
	1984	82.9 (711)	77.1 (149)
	1985	79.4 (373)	71.7 (92)

Table 2 (Continued)

ITEM	YEAR	PERCENT AGREE	
		AHS (N)	CFHS (N)
28. Students enjoy attending this school most of the time.	1983	65.8 (383)	91.0 (222)
	1984	69.3 (717)	67.3 (150)
	1985	67.8 (373)	68.4 (92)
30. Students show little respect for school property in this school.	1983	41.4 (380)	67.1 (222)
	1984	33.9 (737)	42.5 (148)
	1985	39.0 (372)	37.7 (93)
32. The people at this school care about students.	1983	64.0 (378)	89.2 (222)
	1984	65.3 (741)	66.8 (148)
	1985	68.6 (370)	66.7 (93)

8% difference in the opposite direction is shown in the opinions of students from AHS during the same time span. In 1985 the students from both schools expressed nearly the same opinion with only a .5% difference.

CFHS students strongly agreed (92.7%) in 1983 with item 5, "This school is a friendly place," while 71% (21.7% fewer) agreed with the statement in 1985. A decline of 17.2% in positive opinions of CFHS students was shown in response to item 10, "Most students treat other students with respect at this school."

The largest difference (9.4 points) in responses of original AHS students and new (CFHS) students was in item 15, "Students really feel like they are a part of this school." The positive opinions of CFHS students fell from a high of 89.6% in 1983 to 58.7% (30.9 points) in 1985. A decline of 24.7 points is shown in the opinions of students from CFHS from 1983 to 1985 for item 24, "Students are proud of this high school."

Students from CFHS expressed less positive opinions (22.6%) from 1983 to 1985 in relation to item 28, "Students enjoy attending this school most of the time." For item 30, "Students show little respect for school property in this school," these same students' opinions declined 29.4% between 1983 and 1985. CFHS student opinion declined 22.5% from 1983

to 1985 in relation to item 32, "The people at this school care about students."

In Table 3 CFHS student responses to item 2, "Students are not encouraged to participate in activities at this school," increased in a negative direction from 22.4% in 1983 to 43% in 1985.

In response to item 7, "There have been times when students would have liked to participate in a club or activity but didn't because (a.) of transportation problems," CFHS students' opinions moved from 39.6% in 1983 to 63.7% in 1985. A peculiarity is seen in comparing the answers of AHS students in 1985 with those of CFHS students to the stem statement and the "b." completer, "of not feeling welcome." The students from AHS expressed 56.8% (8% more than from CFHS students) agreement with the statement while the students from CFHS expressed only 49.4% agreement with the statement.

Responses to item 19, "Teachers at this school try to make sure students understand the courses they teach" from Table 4 showed that the opinions of CFHS students declined 21% from 1983 to 1985. However, both AHS students and CFHS students appear to agree with item 37, "Teachers in this school are interested in the courses they teach." AHS students expressed a decline of 9.8% from 1983 to 1985 for item 23, "Teachers at this school let students know what is

Table 3

Student Responses to Participatory Issues
in Allegheny Highlands High Schools, 1983-1985

ITEM	YEAR	Percent Agree	
		AHS(N)	CFHS(N)
2. Students are not encouraged to participate in activities at this school.	1982-83	36.8(386)	20.6(223)
	1983-84	34.8(753)	34.4(151)
	1984-85	38.6(376)	43.0(93)
7. There has been times when students would have liked to participate in a club or activity but didn't because	1982-83	70.0(370)	39.6(217)
	1983-84	73.7(725)	64.9(148)
	1984-85	73.2(358)	63.7(91)
a. of transportation problems	1982-83	56.0(375)	42.8(215)
	1983-84	59.3(715)	45.1(142)
	1984-85	56.8(359)	49.4(89)
b. of not feeling welcome	1982-83	51.2(371)	48.8(213)
	1983-84	59.4(711)	47.9(142)
	1984-85	55.3(356)	50.0(90)
c. of financial constraints	1982-83	73.7(377)	72.2(216)
	1983-84	73.3(715)	72.7(143)
	1984-85	81.1(366)	81.3(91)
d. of time constraints	1982-83		
	1983-84		
	1984-85		

Table 4

Student Responses to Instruction and Teachers Issues
in Alleghany Highlands Schools, 1983-1985

ITEM	YEAR	Percent Agree	
		AHS(N)	CFHS(N)
19. Teachers at this school try to make sure students understand the courses they teach.	1983	66.2 (379)	86.6 (223)
	1984	68.5 (719)	64.1 (149)
	1985	66.6 (371)	65.6 (93)
23. Teachers at this school let students know what is expected of them.	1983	81.9 (381)	94.5 (223)
	1984	80.4 (712)	81.4 (150)
	1985	82.5 (374)	84.7 (91)
35. Teachers at this school try to vary their instruction to meet individual needs of students.	1983	55.6 (372)	81.3 (220)
	1984	57.7 (725)	58.6 (145)
	1985	58.5 (371)	67.5 (92)
37. Teachers in this school are interested in the courses they teach.	1983	76.2 (374)	90.6 (222)
	1984	78.0 (731)	84.1 (145)
	1985	80.6 (372)	84.7 (91)
38. Teachers at this school are deserving of respect from students.	1983	74.9 (375)	91.5 (221)
	1984	77.1 (730)	79.1 (148)
	1985	77.6 (370)	80.4 (92)
40. Much of what we read in the newspapers and hear on television suggests that the public schools are not doing a very good job. That students are			

Table 4 (Continued)

ITEM	YEAR	AHS(N)	Percent Agree CFHS(N)
not being asked to work hard enough, that the quality of work and expectations have declined, that discipline is a problem and that generally public schools are failing in their mission.	1983	34.6 (375)	19.9 (222)
	1984	37.2 (733)	33.9 (147)
	1985	33.3 (349)	38.9 (90)
This statement is an accurate description of this school.	1983	34.6 (375)	19.9 (222)
	1984	37.2 (733)	33.9 (147)
	1985	33.3 (349)	38.9 (90)

expected of them." Opinions in response to item 35, "Teachers at this school try to vary their instruction to meet individual needs of students," declined from 81.3% in 1983 to 67.5% for a difference of 13.8% as expressed by students from CFHS. In response to item 38, "Teachers at this school are deserving of respect from students," CFHS students' opinions declined 11.1% from 1983 to 1985; however, their opinions declined only 1.3% from 1984 to 1985.

Students from CFHS disagreed with item 40, "Much of what we read in the newspapers and hear on television suggests that public schools are not doing a very good job, that students are not being asked to work enough, that the quality of work and expectations have declined, that discipline is a problem and that generally public schools are failing in their mission. This statement is an accurate description of this school." In 1983, 19.9% agreed with the statement compared with 38.9% in 1985, a difference of 19%.

In Table 5 the tabulation of responses were addressed from item 39, "Students are often given the grades A, B, C, D, and Fail to denote the quality of their work. Suppose the services provided by the school were rated in the same way, what grades would you give them?" The tabulations were done by combining A and B grades, reporting responses of C singly, and combining grades of D and F.

Table 5

Student Responses to Rating
Services Provided by the School

ITEM	YEAR	AHS (N)			CFHS (N)		
		A-B	C	D-F	A-B	C	D-F
39. Students are often given the grades A, B, C, D, and Fail to denote the quality of their work. Suppose the services provided by the school were rated in the same way, what grades would you give them?	1983	13.6(52)	33.6(128)	52.8(201)	38.7(86)	33.8(75)	27.5(61)
	1984	17.4(129)	26.3(194)	56.2(416)	12.8(19)	33.8(50)	53.4(79)
	1985	13.4(50)	38.8(145)	47.9(179)	15.1(14)	36.6(34)	48.3(45)
	1983	52.0(196)	25.7(97)	22.3(84)	42.8(95)	19.8(44)	11.3(25)
	1984	49.0(361)	32.2(237)	18.8(138)	56.5(83)	27.9(41)	15.6(23)
	1985	52.7(197)	32.9(123)	14.4(54)	58.1(54)	36.6(34)	5.4(5)
	1983	49.1(185)	28.4(107)	22.5(85)	72.5(161)	18.0(40)	9.5(21)
	1984	54.2(398)	25.6(188)	20.2(148)	43.9(65)	41.2(61)	14.9(22)
	1985	49.9(187)	33.1(124)	17.1(64)	55.4(51)	30.4(28)	14.0(13)
d. How would you rate the counselors at this school?	1983	79.5(302)	10.0(38)	10.5(40)	83.3(185)	12.2(27)	4.5(10)
	1984	81.4(601)	11.5(85)	7.0(52)	81.5(119)	15.1(22)	3.4(5)
	1985	79.1(295)	13.1(49)	7.8(29)	87.0(81)	5.4(5)	7.5(7)
e. How would you rate the administrators at this school?	1983	38.0(144)	24.3(92)	37.7(143)	81.9(181)	10.9(24)	6.8(15)
	1984	33.2(245)	26.2(193)	40.6(299)	45.2(66)	27.4(40)	27.4(40)
	1985	41.8(156)	22.5(84)	35.7(133)	44.1(41)	29.0(27)	26.9(25)
f. How would you rate this school overall?	1983	56.5(216)	23.6(90)	19.9(76)	87.4(194)	6.3(14)	6.3(14)
	1984	57.0(421)	27.8(205)	15.2(112)	44.5(65)	28.1(41)	27.4(40)
	1985	49.6(186)	34.7(130)	15.7(59)	54.8(61)	32.3(30)	12.9(12)

The responses of students from CFHS for "a. How would you rate the food services at this school?" show a decline of 23.6% from 1983 to 1985 for A-B grades and an increase of 20.8% for grades D and F in the same time frame. In 1985 the responses of students from both schools were virtually alike.

For question "b. How would you rate the library and media services at this school?" students from CFHS responded 15.3% more positively in the A-B category in 1985 than they had in 1983; they believed that a grade of C was more deserved (16.8%) in 1985 than in 1983. More AHS students than CFHS students (9%) believed that a grade of D or F was appropriate in 1985; thus, AHS students were more critical of library and media services than CFHS students.

For question "c. How would you rate the teachers at this school?" 72.5% of the students from CFHS felt in 1983 that their teachers deserved grades of A or B in 1985; only 55.4% of the students supported the grade of A or B for their teachers. In 1985, the students from both schools expressed nearly the same opinions.

For question "d. How would you rate the counselors at this school?" the AHS and CFHS students awarded high marks to counselors. Approximately 81% of the students responded with grades of A or B in 1983 and approximately 83% gave the same response in 1985.

For question "e. How would you rate the administrators at this school?" the responses of CFHS students declined 37.8% from 1983 to 1985 for the grade of A or B; the responses for the grade of C increased 18.1% from 1983 to 1985; and the responses for the grade of D or F increased 20.1% from 1985 to 1985.

For question "f. How would you rate this school overall?", the responses from students from CFHS declined 32.6% from 1983 to 1985 for the grade of A or B; their responses for the grade of C increased 26% during the same time span. Meanwhile, students from AHS responded with an increase of 11.1% for the grade C from 1983 to 1985. Students from both schools were in close agreement in response to this question in 1985.

What Were Teachers' Perceptions About the Merger?

The second research question was "What were teachers' perceptions about the merger?" To derive teachers' opinions about the merger and their school division, the Annual Staff Survey (Appendix L) was developed. The Annual Staff Survey is a twenty-five item instrument whose items cluster under the headings of communication, administration, curriculum, and instruction, community relations, school/system climate, and teachers and their roles. The instrument was developed by Wayne Worner as a component of the evaluation design for

a pilot studies project in the Alleghany Highlands Public Schools.

Teachers completed the Annual Staff Survey each May from 1983-1985. Respondents selected one of the six possible choices (strongly agree, agree, tend to agree, tend to disagree, disagree or strongly disagree), to indicate their feelings about each of the twenty-five statements. The responses were tallied and a scale was applied to provide meaning. A score of 3.5 indicated a neutral response, a score of >3.5 indicated a positive response, and a score of <3.5 indicated a negative response. Any change of .5% from one year to the next was considered notable.

In 1983, teachers were neutral regarding their feeling of involvement in program planning and curriculum decisions. In 1985, they felt slightly more involved (see Table 6). In the 1982-83 school year, no students or teachers changed locations. During the summer of 1983, curriculum development was emphasized with the entire middle school staff involved. In 1983-84, students and some staff members changed locations with the opening of Clifton Middle School and Alleghany High School. Elementary schools continued to operate as they had previous to merger and did not begin fusing and developing curriculum until 1985 when an elementary supervisor was employed.

Table 6

Degree of Teacher Involvement in
Decision Making and With Student
Pre-Consolidation Compared With Post-Consolidation
Responses From Annual Staff Survey, 1983-1985

ITEM SURVEY	1982- 1983(N)	1983- 1984(N)	1984- 1985(N)
1. Teachers are committed and dedicated to students.	4.8 (187)	4.7 (152)	4.8 (216)
12. Teachers are not very much involved in program planning or curriculum decisions.	3.4 (187)	3.2 (152)	3.1 (216)
22. Teachers are willing to participate in curriculum planning and evaluation.	4.3 (187)	4.5 (152)	4.5 (216)

In response to item 22, "Teachers are willing to participate in curriculum planning and evaluation," teachers gave positive answers in 1983 (4.3) and even more positive opinions in 1985 (4.5).

Teachers appeared to believe (4.8) in 1983 and again in 1985 (4.8) that they are committed and dedicated to students. It appears from other sources that this opinion is accurate.

In Table 7 teachers stated in 1983 that they got along well with each other, that parents supported teachers in matters of instruction, and that they felt good about their association with education in this county; they reiterated these responses in the subsequent two years of the study. Teachers did not feel as positive about morale being higher in the Alleghany Highlands than in most comparable school systems, with a response of 3.4 in 1983 and in 1985.

In responses revealed in Table 8 teachers gave the school board high marks for its commitment to high quality education with 4.4 in 1983 compared with 4.6 in 1985. Teachers agreed with the statement that "The quality of education has improved over the last three years." A score of 3.9 in 1983 moved in a more positive direction to 4.3 in 1985. Teachers were neutral about how well the school board was well informed about what goes on in schools (3.4) in 1983, but they thought the school board was slightly better informed (3.8) in 1985.

Table 7

Degree of Positive Feelings Pre-Consolidation
 Compared with Post Consolidation
 Responses From Annual Staff Survey, 1983-1985.

SURVEY ITEM	1982- 1983(N)	1983- 1984(N)	1984- 1985(N)
3. Teachers get along well with each other.	4.6 (187)	4.6 (152)	4.5 (216)
4. Parents support the teachers in matters of instruction.	3.8 (187)	4.1 (152)	4.1 (216)
20. Teachers' morale is higher than that in most comparable school systems.	3.4 (187)	3.5 (152)	3.4 (216)
25. I feel good about my association with education in this school/county.	4.4 (187)	4.6 (152)	4.6 (216)

Table 8

The Degree of Commitment by
The School Board to Quality Education,
Responses From Annual Staff Survey, 1983-1985

SURVEY ITEM	1982- 1983(N)	1983- 1984(N)	1984- 1985(N)
16. The school board is committed to high quality education.	4.4 (187)	4.5 (152)	4.6 (216)
18. The school board is well informed about what goes on in the schools.	3.4 (187)	3.4 (152)	3.8 (216)
19. The quality of education has improved over the last three years.	3.9 (187)	4.2 (152)	4.3 (216)

Table 9
Degree of Impact of Consolidation
Responses from Annual Staff Survey, 1983-1985

SURVEY ITEM	1982-83(N)	1983-84(N)	1984-85(N)
11. Consolidation will not make much difference in the operation of the school(s) over the next five (5) years.	2.7 (187)	3.2 (152)	3.4 (216)

In response to item 11, Table 9, "Consolidation will not make much difference in the operation of the school(s) over the next five (5) years," teachers' opinions were 2.7 in 1983 compared with 3.4 in 1985. It appears that the longer teachers were associated with the new system, the more trusting they became.

All three items in Table 10 indicate that teachers felt that administrative support and communication had improved from 1983-1985. Item 6, "The administration provides support and encourages high quality education," moved .6 in a positive direction from 1983-1985. A positive change of .5 for item 8, "Information about school policies and plans is effectively communicated to teacher" occurred from 1983-1985. The responses to item 13, "Administrators communicate effectively with teachers" indicate a positive change of .6 from 1985-1985.

Thus, the Annual Staff Survey revealed a majority of positive responses, with responses showing tendencies toward even more positive opinions as the merger and the study progressed from 1982-83 to 1984-85. Generally, teachers indicated satisfaction with consolidation and with what happened in regard to them as individuals and to their positions in the school system. Personnel moves and changes in assignments were well accepted. Middle School teachers

Table 10

The Degree of Administrative
Communication/Performance
Responses From Annual Staff Survey, 1983-1985

SURVEY ITEM	1982- 1983(N)	1983- 1984(N)	1984- 1985(N)
6. The administration provides support and encourages high quality education.	3.9 (187)	4.5 (152)	4.5 (216)
8. Information about school policies and plans is effectively communicated to teachers.	3.5 (187)	3.8 (152)	4.0 (216)
13. Administrators communicate effectively with teachers.	3.3 (187)	3.4 (152)	3.9 (216)

accepted the challenges of many changes in curriculum and organization (Interviews with F, G, H).

How Were Finances Affected by Merger?

"How were finances affected by merger?" is the third research question. On June 30, 1982, an agreement for consolidation (Appendix E) was signed by the School Board of Alleghany County, the School Board of the City of Clifton Forge, the Board of Supervisors of the County of Alleghany, and the City Council of the City of Clifton Forge. The first two sections of the agreement addressed revenues, expenditures, and the local contribution formula for operational expenses.

Five factors were included in the determination of each governmental unit's share of the combined operating budget: real estate, sales tax collected, number of pupils, local dollars contributed the previous year, and personal income. The amount of money comprising each factor, i.e., the value of real estate, the amount of sales tax collected the past year, the number of pupils as of December 1, the local dollars spent for education the previous year, and personal income was computed. Then the percent of contribution for each governmental unit was determined by averaging the averages for a composite average for each locality (Table 11). The composite average represented the percent of local

funds each governmental unit was required to contribute to the local portion of the education budget.

Senator Dudley Emick had sponsored legislation (1981) to provide incentive or seed money to local school divisions to encourage consolidation. The incentive allowed the use of the lower composite index for figuring state aid to each locality involved in a merger for the biennium, 1982-1984. A total of \$249,239 was realized from consolidation incentive funds.

The use of the more favorable composite index, .2894, for Alleghany County as compared with .4302 for Clifton Forge for the biennium resulted in additional state funds. No public financial statement was issued on how much money consolidation garnered because there was some concern that the governing bodies would want to spend the excess money (Interview with A). The total amount of consolidation incentive money was \$249,239, with \$119,239 received during the first year of consolidation (1982-83) and \$130,000 during the second year of consolidation (1983-84).

For the first year of consolidation, the consolidation incentive funds were apportioned to each governmental unit's credit based on the percentage each was paying toward the operating budget; then the governmental unit's contribution was reduced by that amount. For the first year of the merger, Clifton Forge was credited with \$45,402 while Alleghany

Table 12

Allegheny Highlands Public Schools
Incentive Funds 1982-1984

	ALLEGHANY 1982-83	CLIFTON FORGE 1982-83	ALLEGHANY 1983-84	CLIFTON FORGE 1983-84
Percent of Budget	62.0	38.0	62.79	37.21
Incentive Funds	\$ 73,837	\$ 45,402	\$ 65,000	\$ 65,000
Net Appropriations	\$1,760,624	\$1,041,763	\$1,805,254	\$1,043,331
State Basic Aid Incentive Grant:				
	<u>1982-83</u>	<u>1983-84</u>	<u>Total</u>	
	\$119,239	\$130,000	\$249,239	

County was credited with \$73,837 (Table 12). In the second year, each governmental unit received 50% credit toward local funds for the operating budget. Thus, the \$130,000 in consolidation incentive funds was divided equally with \$65,000 credited to each locality.

While the costs for education in the Alleghany Highlands continued to rise, the rate of increase has probably been slower than it might have been for each governmental unit to support separate systems. In the 1983-84 school year, employees received eight to ten percent pay increases. Improvements which were long overdue at school sites were completed; e.g., replacing the roof on the cafeteria at Clifton Middle School, installing a safety fence at Callaghan Elementary School, and replacing an outdoor lighting system which was ready to collapse at Alleghany High School (Interview with A). At the same time local contributions increased only 1.48% (see Table 13).

One key actor contended that Clifton Forge councilmen had lowered the tax rate on business property because consolidation would take care of the schools by placing a greater burden on Alleghany County. Two tax receipts on buildings in the business district of Clifton Forge were produced by the interviewee. The tax in 1985 was \$242.82 lower than the tax in 1977 (Interview with J).

Table 13

Local Share of Total Budget
Excluding Debt Service and Literary Fund Receipts

Year	Locality	Local Funds	% of Local	% Increase of Combined Local	Total Budget	% of Ind. Local Budget	% Inc. of Combined Total Budget	% of Total Budget
1977-78	A.C.	\$1,484,154.98	67.40		\$3,823,807.58	38.81		27.32
	C.F.	717,859.00	32.60		1,608,555.55	44.63		13.21
		<u>\$2,202,013.98</u>	<u>100.00</u>		<u>\$5,432,363.13</u>			<u>40.53</u>
1978-79	A.C.	\$1,744,687.72	68.02		\$4,398,702.15	39.66		28.79
	C.F.	820,137.00	31.98		1,662,186.44	49.34	11.57%	13.53
		<u>\$2,564,824.72</u>	<u>100.00</u>	16.48%	<u>\$6,060,888.59</u>			<u>42.32</u>
1979-80	A.C.	\$1,876,867.99	67.30		\$4,744,347.10	39.56		28.65
	C.F.	911,974.32	32.70		1,805,582.24	50.51	8.07%	13.93
		<u>\$2,788,842.31</u>	<u>100.00</u>	8.73%	<u>\$6,549,929.34</u>			<u>42.58</u>
1980-81	A.C.	\$1,556,819.38	56.81		\$5,865,032.80	26.54		19.08
	C.F.	1,183,797.48	43.19		2,296,866.61	51.54		14.50
		<u>\$2,740,616.86</u>	<u>100.00</u>	- 1.73%	<u>\$8,161,899.41</u>		24.61%	<u>33.58</u>
1981-82	A.C.	\$1,673,741.80	61.82		\$5,915,515.23	28.29		20.89
	C.F.	1,033,814.00	38.18		2,097,094.00	49.30	- 1.83%	12.90
		<u>\$2,707,555.80</u>	<u>100.00</u>	- 1.22%	<u>\$8,012,609.23</u>		H = 10.61%	<u>33.72</u>
* 1982-83	A.C.	\$1,765,280.06	62.89%	H = 5.57%				
	C.F.	1,041,667.56	37.11%					
		<u>\$2,806,947.62</u>	<u>100.00</u>	3.67%	<u>\$8,864,637.98</u>		10.63%	31.66
1983-84	A.C.	\$1,805,254.00	63.38					
	C.F.	1,043,137.00	36.62					
		<u>\$2,848,391.00</u>	<u>100.00</u>	1.48%	<u>\$9,193,605.82</u>		3.71%	30.99
1984-85	A.C.	\$2,032,722.00	65.42					
	C.F.	1,074,466.00	34.58					
		<u>\$3,107,188.00</u>	<u>100.00</u>	9.09%	<u>\$10,005,351.82</u>		8.83%	31.06
1985-86	A.C.	\$2,211,624.00	66.22					
	C.F.	1,128,189.00	33.78					
		<u>\$3,339,813.00</u>	<u>100.00</u>	7.49%	<u>\$11,304,244.90</u>		12.98%	29.54
1986-87	A.C.	\$2,408,737.00	66.86					
	C.F.	1,194,017.00	33.14					
		<u>\$3,602,754.00</u>	<u>100.00</u>	7.87%	<u>\$12,199,933.31</u>		7.92%	29.53
1987-88	A.C.	\$2,879,471.00	75.45					
	C.F.	936,825.00	24.55					
		<u>\$3,816,296.00</u>	<u>100.00</u>	5.91%	<u>\$12,439,576.43</u>		1.96%	30.68
				H = 5.92			H = 7.67%	

*First Year of Consolidation

A meeting with the Commissioner of Revenue in Clifton Forge (Downey, 1988) disclosed a tax rate of \$4.30 per foot in 1978, a tax rate of \$1.15 in 1981-82, and a tax rate of \$1.20 in 1984-86. Thus, the tax rose \$.05 following the consolidation of schools. The interviewee's summarizing statement which had been first voiced on April 16, 1984, at the COLG's hearings was that there had been intoxication on consolidation, high taxes, unemployment, economic doldrums, and big spending policies (Interview with J).

Financial issues were among the most sensitive issues in the merger process. Immediate savings were attributable to the merger. Additional monies were realized from the State consolidation incentive grant and from economies resulting from employing one superintendent, one director of special education, and from reducing the number of personnel through attrition. While local tax contributions and percentages of budget increases remained consistent with previous increases over the five year post consolidation period, the increased services, economies of scale, reduction in overhead all served to provide the appearance of a more efficient system (Interview with A).

How Did Patrons and The Community React to the Merger?

"How did patrons and the community respond to the merger?" was the fourth research question. Data from interviews of 24 key actors were examined to answer this question. These interviews were completed by Wayne Worner, Professor of Education, Virginia Tech, and a team of four other interviewers (1980).

Findings

The key actors stated that the merger had worked well (Appendix U). Major benefits which they cited were program quality and cost effectiveness. Respondents recognized that efficiency and cost effectiveness would result from consolidation. They had not expected real dollar savings. However, a number of the respondents believed that significant dollar savings had already been achieved because of consolidation.

Deficiencies of Merger

Approximately half of the interviewees did not name any deficiencies or weaknesses they associated with consolidation when they were questioned. They mentioned some "start-up" problems: integrating policies and procedures, selection of honor students, and issues of dollar equity. Several respondents noted that the budget making process was

cumbersome and a potentially major problem for continued success. Four or five observers stated that the greatest weakness was that consolidation did not include Covington and/or did not include other governmental services. Other deficiencies included insufficient number of minority role models, loosened ties between local government and the schools, less individual attention, fewer opportunities to participate for some, and identity problems.

Adequacy of Funding

While respondents stated that the community does make a substantial effort, that schools could use additional money and the school system, on balance, spent its money wisely. Also, the State was blamed for mandating services without appropriate funding. Approximately 80 percent of the respondents believed that improved teachers' salaries should be a top priority. Another high ranking concern was the improvement of facilities.

All interviewees believed that consolidation was a success. They believed that schools were better and cost less as a result of consolidation. Among the general comments were positive statements about the use of community resources and governmental cooperation. There were expressions of concern regarding the future of the merger.

Key actors from the group of fifteen interviewed by the researcher from 1985-1987 mentioned many of the same thoughts. Efficiency was the word most often mentioned along with expanded educational opportunities at Alleghany High School. (For additional information see Appendix G.)

What Changes in Education Were Apparent Following the Merger?

The fifth research question was "What changes in education were apparent following the merger?" Again, responses to interviews have been used to provide some answers to this question.

Benefits of Merger

Program quality improvements such as expanded curriculum, continuation of specialized classes, more effective use of special staff competencies, and increased student competition were specified. Broader course offerings (especially for students from Clifton Forge) increased opportunities for preparation for college-bound students, and continuation of specialized courses were made possible by greater numbers of students.

Other positive changes named were the middle school organization, improved foreign language offerings, expanded social interaction, additional courses, community cohesion, and expanded transportation services.

Appendix Q lists the courses provided at Clifton Forge High School (CFHS) during the 1982-83 term as well as those provided at Alleghany High School from 1978-79 through 1984-85. A count of courses showed that students at CFHS could have enrolled in 59 different courses or levels of courses in 1982-83. At Alleghany High School students could have enrolled in 102 different courses or levels of courses during 1982-83. A wider variety of courses and additional levels of courses were available both at the high school and at Clifton Middle School. Dr. Mark Pace, Superintendent, was quoted in the Roanoke Times, (June 5, 1984) as saying that "the new high school has many courses neither Alleghany County High nor Clifton Forge High had, such as Latin, calculus, Russian, German, and new offerings in fine arts and vocational education."

Deficiencies of Merger

One problem which several key actors mentioned was that of budget development. Having to work through the process with two governing bodies was viewed as a potential handicap.

General Comments

Among the general comments from respondents were pleasure with the attempts to establish an educational foundation, high marks for the school board and

administration, compliments for principals and teachers, and pride in local schools. Although some problems were recognized, the overwhelming majority of respondents found the schools good and getting better. The local schools were rated as high average of 6-7 on a ten point scale.

Suggested Changes

Suggested changes included more emphasis on academics rather than on sports, more competitive salaries, maintenance of the vocational program, and balancing the arts with science/math emphasis. An area of concern was the recruitment and retainment of quality personnel, especially minority teachers. No one suggested solutions to the problems of recruiting for a small rural area.

Summary

In Chapter 5 the five research questions were answered following an opening description of the merger environment and some events pre and post merger. The key actors provided most of the information detailed in the description. Supporting data came from newspaper articles, budget files, and general personnel files.

The results from two survey instruments were reported. Student responses to the High School Survey (1982-1985) were discussed when they showed a 10% difference between scores

derived in 1982 compared with scores tabulated for 1985 and when scores for the two groups of students (original AHS and CFHS students) differed by 10%.

The second survey instrument, the Annual Staff Survey, was administered annually (1982-1985) to elicit teachers' perceptions of the new school division. Any variation in scores of .5% or greater from one year to another was deemed notable and was discussed.

Budget files yielded valuable information used in determining how merger impacted finances. Personal interviews of key actors also provided insights into financial considerations. An elaborate system of arriving at a composite average for each governing unit and to be applied to the total of required local funds to determine each governing unit's share was discussed. Even though the costs of education have continued to rise, the community perception is that the merged system is more efficient than the operation of two independent systems.

Many changes in education were apparent following the merger. Two of the most visible changes were reorganization to provide an eighth grade middle school and the wide array of courses available at Alleghany High School. These two changes were mentioned by every key actor except two. The perceptions of the Alleghany Highlands Public Schools indicated that consolidation was successful, that students

were receiving quality education, and that fiscal responsibility was paying dividends in more money for more programs.

In the interview for the Roanoke Times (June 5, 1984), Mark Pace, Superintendent, Alleghany Highlands Public Schools, stated, "We made two promises. We told people we'd offer a better educational program and we'd do so much more efficiently. I think we have more than met the educational promises and the financial promises."

Chapter 6

SUMMARY, CONCLUSION, AND RECOMMENDATIONS FOR FURTHER STUDY

SUMMARY

The intent of this study was to describe accurately the creation of the Alleghany Highlands Public School System and the early years of its operation and to examine specific impacts of the merger. Justification for the study was based on a void in the body of research on school system consolidation, especially the impacts on students in the process. The focal period for the study was 1980-1983; however, important events on each side of the focal dates have been included as appropriate.

A review of the literature and contextual background for the study were provided. The desire for autonomy, made possible through localized control, in competition with potential economic savings and program improvement through school system consolidation, and the accompanying bureaucratization of the system, were explored in the literature review. A closer look at the Virginia context was made possible by reviewing appropriate aspects of the Virginia experience in governmental consolidation, the Constitution of Virginia, and the Code of Virginia as it applies to school system consolidation. Further, the events

leading to the merger which formed the Alleghany Highlands Public Schools on July 1, 1982, were presented.

The methodology employed in the study included various approaches including naturalistic inquiry (Guba), surveys, and interviews. The reputational method (Hunter, Kimbrough) of naming key actors was used to generate the lists of interviewees.

Triangulation was applied as data from one source were compared with comparable data derived from other sources. Archival material, newspaper articles, minutes of school board meetings and of governing body meetings, letters, policy statements, and legal agreements provided rich sources of data for triangulation of data garnered from personal interviews with focal actors.

Chapter Four details the early days of the consolidated system, beginning with an address by S. John Davis, State Superintendent of Public Instruction, part of the preschool conference agenda for August 25, 1982, the first meeting of the consolidated instructional personnel. Davis reminded the group that they would be living in a fish bowl for some time as the rest of the state followed the results of consolidation in the Alleghany Highlands.

During the first year of merger (1982-1983), schools followed their original organizational patterns. At the central office level where administration was consolidated,

many activities were undertaken in preparation for implementation during the 1983-84 school year. Personnel adjustments between the middle school and high school were made in the instructional staff as well as in the coaching staff. A process was initiated to provide the opportunity for the people best qualified for specific positions to apply for them. Staff development programs prepared teachers and administrators for the opening of the middle school. Curriculum alignment and development were important endeavors. School board policy manuals were merged and modified as necessary to govern the consolidated system.

The community was a vital part of the activity of 1982-83. Committees, composed of lay people and educators, were appointed to recommend curriculum for the middle school and high school, names for the two schools, school colors, and school mascots, mandated activities in some respects but emotionally-charged activities.

Communication was a concern during 1982-83. Teachers' morale was in question because teachers at both high schools knew that some of them would be assigned to different schools for 1983-84.

The new school system was governed by a nine member board, with five members from Allegheny County and four from Clifton Forge. Helen Kostel was chosen to serve as the first

chairman of the board of the Alleghany Highlands Public Schools.

One of the major reasons for consolidating school systems was the potential for financial savings through a decrease in the rate of increase in spending. In the fall of 1981, contacts were made with the Department of Education, the Office of the Secretary of Education, and Senator Dudley Emick to request that incentive funds be made available to encourage consolidation. Indeed, Senator Emick did sponsor legislation which permitted the school system to apply the lower composite index to both the county's and the city's enrollment figures for the biennium, 1982-1984. Local cost shares were determined by applying a formula based on the percent in each locality of the total for five factors: the value of real estate, personal income, local retail sales tax collected, the number of pupils, and the ratio of dollars contributed to education the previous year. A composite percentage was obtained and applied to the total required local dollars.

Clifton Middle School opened in 1983-84 on a seven period day with each student enrolled in seven courses. Students selected from twenty-five courses available; the "Wheel," a required course for most students, consisted of six weeks of computer literacy, study skills, home economics,

shop, French or Spanish, and art. Ninety-two courses were offered to students at Alleghany High School.

The school buildings in Clifton Forge were much older than those operated in Alleghany County. Some renovations had been made by both systems previous to merger. Following the recommendations of the consultants, the board decided to operate all six elementary schools (K-7) as they had been prior to merger, to initiate Clifton Middle School for grade 8, and to designate Alleghany High School for grades 9-12 for the 1983-84 term.

The decision was made to provide transportation for all students, even those who could easily walk to school. Clifton Forge had provided only limited transportation services before merger; consequently, Clifton Forge had no fleet of buses. However, with careful planning, all students were provided access to public transportation without adding additional buses.

Each school board (Clifton Forge and Alleghany County) had issued contracts to its respective personnel prior to July 1, 1982. On that date (effective date of merger), the new Alleghany Highlands School Board ratified the contracts. Some adjustments were made to equalize benefits as the systems merged.

FINDINGS AND CONCLUSIONS

The data presented in Chapters Four and Five provide answers to the research questions posed in Chapter One. The following findings and conclusions are presented in response to the research questions.

1. What happened to students in the merger process?

According to the student responses from the High School Survey, students at Alleghany High School are satisfied with their school. Of course, individual items on the High School Survey reveal varying degrees of satisfaction or dissatisfaction by former Clifton High School (CFHS) students and Alleghany students. In 1985 for example, 78.1% of the AHS students stated that the school is friendly and 71% of CFHS students agreed. Students from CFHS (58.7%) did not feel like they were a part of the school while 68.1% of the AHS students did. Both groups of students indicated pride in the school (AHS, 79.4% and CFHS, 71.7%). A majority of the students responded that they enjoyed attending AHS most of the time, AHS - 67.8% and CFHS - 68.4%.

Generally, students from Clifton Forge High School indicated strong, positive regard for Clifton Forge High School (CFHS), the staff, the program, and services in 1983. Perhaps a halo effect is evident as students expressed a satisfaction for a school which would soon cease to exist. Shakespeare's "Sonnet LXXIII" probably contains a clue to

some of the spread in responses to the High School Survey from students from AHS as compared with those from students from CFHS for the 1982-83 term. Shakespeare wrote, "This thou perceiv'st, which makes thy love more strong, to love that well which thou must leave ere long." In other words, feelings of pride and loyalty for Clifton Forge High School were likely intensified because an era was coming to a close for the students who were "going out in a blaze of glory," the slogan for 1982-83. A senior from CFHS had dreaded joining the county students. "We thought they were all stuck up, that they weren't down to earth. We found out that wasn't true the first couple of weeks," said Bobbie Jean Williams. "I had a great time. I'm really glad we consolidated." Benny Todd Nicely stated, "It [consolidation] went a lot smoother than anybody thought it would." He was pleased with the merger and his new friends. He couldn't name any students who were still grumbling about consolidation (Roanoke Times, June 5, 1984).

Responses from the High School Survey indicate that while the opinions of students from CFHS and those of students from Alleghany High School (AHS) generally showed a wide difference in 1983, the students tended to express much closer agreement in opinion in 1985. Hopefully this melding of opinion is an indicator of a melding student body. It could, however, represent a real difference in attitude (in

a negative direction) about the programs, services, and climate in the new environment compared to the old.

In summary, a substantial majority of the students were positive about their associations with Alleghany High School. The greater differences in opinion expressed on the High School Survey were from former CFHS students, a difference which had been predicted.

2. What were teachers' perceptions about the merger?

Teachers believed that the merger was effective. They were more apprehensive about the merger in 1983 than they were in 1985. In May 1983, teachers knew that some of them would be changing schools, evaluators, and teaching assignments in the fall. By May 1985, teachers knew that consolidation had disrupted or changed their daily work lives very little, giving rise to trust and comfort levels. In fact, elementary schools and elementary teachers had maintained pre-consolidation status in most regards.

No doubt the high marks which teachers gave the communication process are one indicator of why they felt satisfaction with their school system. They showed high regard for both Mark Pace, the superintendent, and for the school board. Teachers also stated that the quality of education had improved from 1983 to 1985.

3. How were finances influenced by the merger?

In the opinions expressed by numerous members of the community, improved fiscal management of the education budget was often cited. Indeed, economies were realized from merging staffs and responsibilities; e.g., one superintendent, one supervisor of special education, one transportation system, and one maintenance crew. Also, class size changed from very sparsely populated classrooms to ones of more conventional (usually 25 pupils) size. An eight to ten percent pay increase in 1983-84 for all employees together with the completion of expensive, long overdue maintenance projects were tangible evidence to many people that fiscal constraints had lessened following the merger.

Two factors did bring immediate financial gains to the new school division. One factor, addressed earlier, was a reduction in central administrative positions; e.g., one superintendent and one special education supervisor. The second factor was the legislation granting the use of the lower composite index for the entire school division for the biennium, 1982-1984, resulting in \$249,239 in consolidation incentive funds from the state over the two year period.

Financing the new school division through two governing bodies was often voiced as a potential problem. A formula based on five factors was used to determine each locality's share of local funding. The factors were value of real estate, local sales tax collections, number of pupils,

personal income, and local dollars contributed to education the previous year.

The concerns about potential budgetary problems proved to be accurate. There were problems with the budget process in the spring of 1988 when Clifton Forge Council stated that the City would fund only \$936,000 of the requested funds of \$1,174,017. A series of meetings followed and a new formula was devised. The new process and formula appear to be working because both localities approved the school budget for 1989-1990 in March 1989, earlier than in any previous year since consolidation.

4. How did patrons and the community respond to the merger?

Clearly, the patrons and community perceived the merger as positive. They believed that students were better prepared through a broader curriculum, and some people were perceptive enough to recognize the value of competition in a positive sense to cause individuals to strive harder and attain greater heights.

Generally, those interviewed did not complain about the cost of education. They expressed the belief that the public was getting its money's worth. In fact, a number of interviewees believed that salaries should be more attractive in order to secure and maintain quality personnel in a rural area.

The overwhelming majority of interviewees believed that the schools were good and getting better. Local schools were rated at 6-7 on a 10 point scale.

5. What changes in education were apparent following the merger?

The educational program for secondary students in the Alleghany Highlands is better than the programs were in the former separate systems. Two major improvements were guaranteed in pre-merger discussions. One change was in the organizational pattern to provide an eighth grade middle school. Clifton Middle School (CMS) could house only one grade level; former CFHS students in grades 8-12 numbered virtually the same as the initial class at CMS (364).

CMS operated on a seven period day. An almost entirely new array of courses was provided for students' selection. The following courses were added to the curriculum at Clifton Middle School: Algebra I super challenge, Science 8 super challenge, Latin I, and semester courses in: mythology, drama, creative writing, art, Virginia history, electricity, metals, drafting, typing, and business exploration. All students who did not enroll in band or a full year of a foreign language were required to enroll in the "wheel." The "wheel" offered opportunities in exploration by providing six weeks of instruction in computer literacy, study skills, shop, home economics, Spanish or French, and art.

Staff development activities and a curriculum workshop had prepared the faculty for the challenge of opening the middle school. While a number of people, educators and patrons, had expressed concerns about a middle school comprised of only one grade level, by the end of the first year (1983-84), many people cited its strong points, e.g, separation from high school pressures, opportunities to excel in extra-curricular activities, and making friends across the county (Interview with A, C, F, and G).

A second apparent change was in the curriculum at Alleghany High School (AHS). While there were only seven more courses offered in 1983 than had been offered in 1982, the entire curriculum had been "fine tuned." Curriculum guides had been rewritten to reflect revisions and alignment of course content from both of the former high schools. Students from CFHS definitely witnessed an expanded curriculum. New courses included: Latin I, Latin II, industrial drafting, great books, economics, professional art, development, recordkeeping, Biology II, Chemistry II, German/Russian, Advanced English 10, Advanced English II, business math, consumer math, computer science, and wood technology.

When any interviewee was asked the benefits to education from the merger, the reply was expanded curriculum at the high school and the provision of a middle school. The

promises of the merger in its relation to the educational program were fulfilled in these two changes.

Merged staffs resulted in expanded educational services to more students at increased efficiency. The services of an on-site school psychologist, physical therapist, and visiting teacher were made possible. In addition to the direct benefits to students were the indirect benefits obtained through the pooling of ideas and staff from the individual school systems. Through staff development and teacher exchanges, the "best of both worlds" has been provided for all students in the merged system.

RECOMMENDATIONS FOR FURTHER STUDY

Additional information regarding student participation in co-curricular and extra-curricular activities in the merged school system would contribute to the body of knowledge. How students fare as a result of consolidation must be the overriding consideration in decision making.

Another component which would provide interesting data is the use of power (politics) in the consolidation process. Power groups emerge in unexpected ways and from unexpected quarters.

A study of the relationship of merger and finance would provide extremely important data. Financial considerations influence decision making in most school systems and

governmental units; therefore, the data derived from a cost/benefit study could be highly informative to school systems contemplating merger.

When a school system and its locality face declining enrollment, an eroding tax base, an elderly population, deteriorating buildings, and ever increasing state mandates, how will the system not only survive, but prevail? Wise educators should learn more about school system consolidation as a possible answer to their dilemma.

EPILOGUE

Annexation

In April 1984, a hearing, on behalf of Covington City, calling for annexation of current county property was heard by the Commission on Local Government (COLG). The primary reason for the denial of the request for annexation was that Alleghany County was able to substantiate its defense that school system merger was working well and that annexation would be damaging to the merger (Interview with A).

Cooperation

Increased cooperation has been evident within the community as well as within the school system. Community groups such as the Mountaineer Athletic Club and the Band Boosters continue to support the merged school system's

activities. The Education Foundation, supported by local business and industry, continues to support special projects and innovations proposed by teachers.

A good working relationship exists among the Alleghany County Board of Supervisors, the Clifton Forge City Council, and the Alleghany Highlands School Board. There have been some "rough" spots, with the budget season in the spring of 1988 being the roughest. Yet, the governing bodies and the school board have worked to develop a more satisfactory policy governing the budget process. Their work paid dividends as the governing bodies contacted Mark Pace, superintendent, on March 20, 1989, to inform him that the 1989-90 budget has been approved. This marks the earliest approval date for the budget since the Alleghany Highlands School System opened.

School Consolidation With Covington

Declining enrollments and maintenance problems in the Covington School System were cited by all of the key actors. Each also noted the extreme pride exhibited by the citizens of Covington in their schools. According to the interviewees, only dire circumstances would be the impetus for consolidation of the Covington Public Schools with the Alleghany Highlands Public Schools.

Future Governmental Consolidation

Most of the people who contributed to this study believe that total governmental consolidation of Alleghany County, Clifton Forge, and Covington depends on how great Covington's financial burdens become. Several people stated that new membership on the Covington City Council might make a difference. Mutual need seems to be a key to total consolidation.

REFLECTIONS

This section of the paper provides the researcher with an opportunity to express some personal impressions as a participant observer in the merger process. Maintaining objectivity and withholding the use of words which denote valuing and feeling for a person who is intuitive and perceptive about her environment and other people have been difficult throughout this project. I was directly involved in the merger, from planning to implementing to evaluating it. I am proud of our community's commitment to the merger and of the school system which merger enabled us to create.

One doctoral committee member stated that he would have advised me not to do a study about an activity in which I was personally involved. That would have been sound advice in my case. I have not consciously attempted to present only the "good" side of the merger, although now I recognize that

I could have more aggressively sought people who might have expressed negative comments about the merger. There was only one key actor who expressed negative ideas about the merger; and I believe that I accurately represented his views in this dissertation. Another identified key actor, known for his negative response to the merger, declined to be interviewed although I called him three times with the intent of enticing him to talk with me.

Although there are many drawbacks to doing a study about an event in which one is involved, there is at least one positive reason for becoming involved in such a study. When a person is known within his/her community and is trusted, interviewees will share information which they might otherwise not reveal. I felt this was the case in several interviews. A facial expression--something between guilt and acceptance of the interviewer into the circle of those who "really know the truth"--came over the interviewees' faces as they told me a "secret" especially when interviewees discussed the use of the charge for water as a lever in the merger process.

All things considered, I am pleased that I chose this topic even though doing this study has presented me with the problems I have mentioned. The merger was an accomplishment which is benefitting our students and our community. It is a case study deserving of documentation. Clearly, our

students have benefitted from the merger. For example, they are performing well on tests. In 1986 the mean SAT combined score for AHS student was 918 compared 908 for the state and with 906 for the tation. Also, 19 students from AHS have earned exempt status from some portion of certain freshman college courses by virtue of their performance on Advanced Placement exams. Concurrently, the community benefits from greater cohesion, perhaps due to cooperative efforts to provide education and a sense of "oneness" which often permeates a community served by only one high school.

Pre-Conditions for a Successful Merger

An interesting question posed to me by the committee was "What pre-conditions will assure a successful merger?" To achieve a successful merger, there are some conditions which serve as facilitators. Included in the list of conditions are the following:

- a crisis situation which demands action;
- local leadership from people who have the vision, courage, and fortitude to perservere with long-term investments of time and energy;
- an external consultant who brings credibility, authority, and accountability to the project; and
- a publicity campaign which will garner support from the media, civic leaders, and other citizens.

Criteria for Measuring Success in School System Merger

A second question from a committee member quickly followed the first question. It was "What criteria would you use in measuring success in a merger?" Success means something slightly different to each of the various groups of people affected by school system merger. I will try to answer the question by addressing success through the eyes of students, teachers, parents, and taxpayers.

Criteria which students might use to assess the success of a merger are as follows:

- a school climate which is friendly and enables them to to belong and feel accepted;
- the provision of a better educational program than the former separate systems had provided;
- teachers who care about students and about helping them to learn;
- administrators who care about students, teachers, and learning and who strive to provide an environment conducive to learning;
- opportunities to participate in co-curricular and extra-curricular activities; and
- the provision of services (e.g., guidance, library, media, and cafeteria) better than those available in the former separate systems.

Criteria which teachers might use to assess the success of a merger include the following:

- security; e.g., I will be treated fairly and there will be a job for "me,"
- autonomy; e.g., the central office will not dictate,
- quality (better schools, better educational programs), and
- the climate in the system and in the school will be a positive force.

Criteria which parents would use to assess the success of a merger include the following:

- the climate in their child's school must be conducive to learning; helping our child to like to attend the new school,
- the provision of a better educational program than the former separate systems had provided,
- teachers who care enough to motivate our child to learn;
- administrators who are fair and who provide a safe, friendly environment conducive to learning;
- opportunities for our child to gain balance in his activities and to gain values through participating in sports, music, dramatics, journalism, forensics, or other activities which meet his/her interests;

- the provision of services which meet the student's needs; and
- the provision of an environment which welcomes the involvement of the parents in the child's education.

Criteria which taxpayers would use to assess the success of a merger includes the following:

- fiscal accountability -- have we saved money?
- the provision of an orderly learning environment; and
- maintenance of schools of which the community can feel proud; e.g., high test scores, low dropout rate, and a high percentage of students gaining entrance into higher education.

Centralization vs. Decentralization

When the views of the proponents of decentralization are juxtaposed with the results of the merger of the Alleghany County and the Clifton Forge schools, one is left with inconclusive evidence that either decentralization or centralization is the one best way to organize a school system. This researcher believes that Tom Peters and Nancy Austin (A Passion for Excellence) are correct when they state that two basics for success in an organization are "pride in one's organization and enthusiasm for its works" (1985, XIX). I believe that most of the employees of the Alleghany Highlands Public Schools possess these attributes and that

the commitment, collegiality, shared values, and effort which result are one of the basics upon which the success of the merger rests.

In A Place Called School, John Goodlad stated that school systems should communicate state goals, develop balanced curricula in each school, employ qualified teachers, provide adequate time and resources, and assure equity in distributing resources (1984, 274-275). On balance, in the Alleghany Highlands Public Schools, there is a mixture of centralized and decentralized activities. For example, in the area of finance, each principal receives an allotment for his school with some guidelines for expending the monies but with a great deal of flexibility. The central office hires personnel in conjunction with the principal, while assignment of personnel within a school is left to the principal's discretion and the need to adhere to state prescribed certification endorsements. Thus, some activities are centralized while others are decentralized in the Alleghany Highlands Public Schools.

Thomas Peters and Robert Waterman addressed the "simultaneous loose-tight properties" (1982, 318) of excellent management practice. "It is in essence the co-existence of firm central direction and maximum individual autonomy" (318). Organizations which practice the loose-tight managerial style are rigidly controlled on one

hand, yet on the other hand, expect autonomy and innovation from every employee. They succeed by employing faith that the objectives will be met. Arthur Wise (1979) related these ideas to the loosely-coupled school system. Again, the Alleghany Highlands School System encourages the staff to try new ideas. In summary, I believe that although the Alleghany Highlands Public Schools, by virtue of its merger, centralized the operation of two school systems, the principals, teachers, and central staff are encouraged to experiment and that a sizable degree of autonomy is available for individuals to exercise. The benefits of merger have continued to manifest the foresightedness of those who led the way to the merger of schools. This researcher believes that consolidation or decentralization is not the primary consideration. Of prime importance are the people in leadership roles in either the consolidated or the decentralized situation. Foremost, it is the vision of the superintendent which determines whether a school system is vital or atrophied. Together with the superintendent's vision, there must be a body of policy makers, the school board, who help to shape a school system with organizational cohesion and purpose. Further, I believe that the quality differences in schools and school systems stem from the use of a range of technical skills, conceptual skills, and human relations skills. And more essential to success in any

school system than the use of the aforementioned skills is how they are used. Whether a school system is consolidated or decentralized, it is basically a system of people. Addressing people's basic needs through the adroit application of human relations skills; i.e., caring and demonstrating that caring, will build a strong school system of individuals committed to the system and to the achievement of the system's goals and objectives.

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Appendix A
Merger Plan

MERGER PLAN FOR THE
ALLEGHANY COUNTY - CLIFTON FORGE
SCHOOL DIVISIONS

November 1, 1981

Funding for this report was provided through the Office of the Secretary of Education, Commonwealth of Virginia, at the request of the School Boards and local governmental units in Clifton Forge and Alleghany County. The information and recommendations found in this report do not necessarily represent the opinions or position of the Office of the Secretary or any other official state agency or department.

Dr. Kenneth Fulp
Dr. Wayne Worner

SECTION I
INTRODUCTION

In June, 1981, the consultant team of Dr. Kenneth Fulp and Dr. Wayne Worner was contacted by the Office of the Virginia Secretary of Education and requested to provide assistance in developing a plan to consolidate the school services and programs of Alleghany County and the city of Clifton Forge.

In a meeting held in Richmond on June 19, 1981, the consultants met with Dr. James Price of the Secretary's staff and Dr. William E. Cochran, Deputy Superintendent of Public Instruction, to discuss the role of the consultants in providing assistance to the two local governments and their School Boards.

The directions received by the consultant team were limited and clear. The consultants were not asked to conduct a feasibility study as to whether consolidation should be undertaken. Nor were they asked to make recommendations as to the advisability of such action. They were requested to outline a plan for consolidation of the two school divisions based upon the Resolutions of Intent to Consolidate which had been passed by the Clifton Forge City Council, the Alleghany County Board of Supervisors and their respective School Boards. Only two caveats were included in the assignment; namely, that any plan should:

1. Ensure that the quality of education in either school system not be reduced, recognizing that the plan was not to be used as an opportunity to enhance the quality of the system (the position being that improvements, if desired, should come

independent of the consolidation plan).

2. Operate within existing revenues and perhaps be able to demonstrate some efficiencies.

Following that meeting, the consultants traveled to Clifton Forge-Alleghany County for on-site review of facilities and records and meetings with various personnel in local government and the school divisions. The consultants also attended three public meetings. The first was held in Clifton Forge on August 12 and was attended by 20 people; the second was held at the Alleghany County High School on August 31 and was attended by 14 citizens. On September 1, 1981, the consultants met with the combined Alleghany County Board of Supervisors and Clifton Forge City Council and their respective School Boards at the Jackson River Vocational Center to discuss the public officials' expectations for the plan.

After a review of the materials provided, extensive discussion with various governmental and school personnel, and the input of citizens and officials at the three public meetings, the consultants began development of the plan to consolidate school programs and services of the Clifton Forge and Alleghany County School Divisions.

Developing the Plan

In preparing to develop the plan the consultants were faced with three major challenges. The first was recognition that the governing bodies had already considered and rejected several options related to cooperation or consolidation of services. Those options included at least the following:

- a. Clifton Forge could give up its city status leaving the operation of all schools in the city and county to the Alleghany County School Board.

- b. Clifton Forge could seek to annex part or all of Alleghany County and assume responsibility for operation of most or all of the schools.
- c. Clifton Forge could remain a city and contract for educational services from the county.
- d. Clifton Forge and Alleghany County could make no effort to change their governance and administrative structure related to education and seek to extend cooperative programming and shared services beyond current levels.

Since these options had been considered and discarded (at least for the time being), the problem was to sort through the political dimensions of each option in order to remove from the proposed plan as many inhibitors to future success of the plan as possible. The option selected by the two localities, which calls for consolidation of school programs and services including the merger of school administration, policies and procedures, and all operations under the direction of one combined or merged School Board, is the plan the consultants were asked to operationalize. It is, in many ways, the most complex of the options available. The proposal calls for combining the largest single governmental service without combining the governmental units responsible for fiscal control of that service - a condition which surely complicates the orderly planning and operation of a school system.

A second major concern at the outset was to determine the scope of the plan and the form that the recommendations should take. Discussion with school personnel, citizens and governing bodies was helpful in this regard. An outline for the report was produced which contained the following major units which were subsequently developed and appear as separate sections of this report:

- I. Introduction
- II. Governance
- III. Administration - Organization
- IV. Finance
- V. Programs/Services
- VI. Personnel
- VII. Facilities
- VIII. Transportation
- IX. Summary - Action Required

Arriving at a preferred form for the recommendations was somewhat more difficult. The consultants were extremely sensitive to the thin line between procedure and policy. In many cases it became obvious that operational differences existed between the two school systems. Some of these differences were based in tradition, some in philosophy and some in economics. Based upon the meeting with the combined governing boards and school boards and the consensus of those present, the consultants have sought to identify differences and options, where they exist, and recommend preferred choices with a rationale for the choice selected.

Two major policy directions were provided in meetings with the combined school boards as follows:

1. The merger plan should provide for continuing employment of all personnel currently employed by the two school divisions at least through the first year of the merger with any economics due to personnel savings to be realized through attrition rather than reduction in force as a result of merger. This policy position does not prohibit reduction in force as a result of continued enrollment decline or economic constraints.

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2. That legal merger would be proposed for July 1, 1982, but that merging of the student population would be delayed until the 1983-84 school year.

SECTION II

GOVERNANCE

At the present time the Clifton Forge School Division has five School Board members appointed at large by the Clifton Forge City Council for terms of four years serving on a staggered term basis. The school system operates under policies and procedures approved by the School Board and is fiscally dependent. The annual school budget is submitted to the Clifton Forge City Council for approval.

The Alleghany County School Division also has five School Board members, one appointed from each of the five magisterial districts of the county by the Board of Supervisors which likewise has five members. School Board members are appointed for four year terms on a staggered basis. The School Division is operated under policies and procedures approved by the School Board. The School Division is fiscally dependent with budgets submitted annually to the Board of Supervisors for approval.

Under consolidation, several options are available for determining School Board membership. Among the most logical (and established precedent) are representation based upon local fund contribution (see James City County-Williamsburg) in which representation is determined by the relative percentage of the budget provided by local funds from the two jurisdictions; representation based upon student enrollment; and representation based upon population. Equal representation could also be considered, which, although illogical on the face of it, acknowledges that in the final analysis each jurisdiction has equal voice in the critical area of budget approval.

Regardless of the approach selected for determining school board representation, it is recommended that the consolidated school system operate with ten Board members initially - gradually reducing the number of members (if the equal representation option is not selected) as terms expire until the appropriate balance of membership is achieved. Assuming the final representation favors the county, it is recommended that the county memberships be retained at five with city membership reduced to an appropriate ratio balance. This will permit the retention of geographical representation by magisterial district and city, consistent with current geo-political considerations.

Although no in-depth review of policy and procedure manuals has been carried out, discussions with school administrators indicate that no major variations exist between the two school division's policies and procedures. It is appropriate, however, that the two policy and procedures manuals be cross-referenced and differences removed with one policy and procedures manual approved for use in the consolidated school system.

While both interim and long range merging of school boards and operating policy and procedures will be relatively easy to achieve, the consultants acknowledge concern regarding the enduring effects of sustained dependence upon a system which requires approval of fiscal matters by two separate boards. While one might hope that governing boards would respond positively to the recommendation of those assigned the responsibility for operating the school system, experience suggests that fiscal recommendations of any kind will be subject to serious scrutiny and review. Without some mechanism for negotiating differences between the boards (City Council and Board of Supervisors) which hold fiscal responsibility, the possibility exists that the consolidated system will forever be subject to funding at the lowest level determined by either board -

a condition which has led to efforts in numerous school systems to separate systems rather than merge them. The possibility also exists when two governmental units are depended upon for funding that the school system and funding of the school program might "fall hostage" to some other function totally unrelated to education (e.g. sewer, water, police protection, etc.).

While these concerns are clearly outside the scope of the consultants assignment, they do represent the single greatest possible deterrent to successful and productive merger of the school systems. Whether the concern is sufficient to cause either or both governmental units to abandon plans for merger or develop mechanisms which assure continued cooperation between fiscally responsible government units is a matter which must be settled locally.

SECTION III

ORGANIZATION - ADMINISTRATION

At the present time the two school systems are organized in a similar fashion. Both operate on a K-7, 8-12 graded structure. Both have streamlined administrative structures with a minimum number of central administrative personnel. Primary responsibility for instructional leadership (especially at the elementary level) is assigned to building administrators.

Neither school system has personnel assigned specifically to financial or personnel functions. Alleghany County does have two administrators assigned to instruction with broad planning, coordinating and evaluation responsibilities. Both systems have Directors of Special Education, neither have vocational directors although that service is coordinated through the Jackson River facility. Both systems have clerks who provide expanded administrative support services especially in the personnel and finance areas. Clifton Forge has a centralized food service operation and very minimal transportation services. No maintenance personnel are employed by that system with nearly all required services provided on a contracted service basis. Alleghany County on the other hand provides food services management at the building level; operates a large transportation service (40 drivers and three mechanics) and employs a number of maintenance personnel. Both systems have a person designated as the textbook agent.

In considering the organizational structure and administrative staffing for the merged school system, a number of issues must be studied

and resolved. For example:

1. How can School Boards currently serving separate school divisions work cooperatively during the first six months of 1982 to assure a smooth transition to a single Board on July 1, 1982? While each School Board will retain the legal responsibility for planning the operation of schools in their respective jurisdictions for the 1982-83 school year, neither Board will have responsibility (as a Board) for operating those programs.
2. What elements of planning must be coordinated to facilitate merged operations in 1982-83 and integrated student bodies in 1983-84? A number of activities which must be undertaken include:
 - a. Committees of the Board must review (or contract for services) the development of School Board policies for the merged district. Revised Board policies should be adopted as a first order of business at the July, 1982 Board meeting.
 - b. The Superintendent for the merged system must be selected and provisions made for assigning the other incumbent Superintendent.
 - c. Administrative structure (position authorization) for central office and buildings must be reviewed and approved. Appropriate adjustments must be made in salary schedule and benefits package for all employees.

The major ingredients of the merger in 1982-83 will relate to policy formulation and administration. From an operating point of view, one Board will be operating the two systems as one in much the same way as they currently operate. Changes in building level procedures, staffing,

programs and services will not be affected until the 1983-84 school year. Nevertheless, the impact at the central office will be dramatic. One set of policies, one Board, one superintendent, one staff, one set of bookkeeping procedures, one set of evaluation procedures will be in place. In addition, considerable time will be required to study and establish policies and procedures relative to staffing, administrative support services, food services, transportation, maintenance and student programs and services which will be implemented the following year.

Prior to the physical merger of facilities and student populations, the following decisions must be made.

- a. School organization and utilization plan for facilities must be reviewed. The preferred plan appears to be assignment of 8th grade students to the Clifton Forge facility and assignment of 9-12 students to the existing county facility.
- b. Consideration should be given to mundane but highly sensitive issues such as naming of facilities, schools, school colors, etc. A community contest is suggested as one way to deal with these concerns.
- c. Decisions must be made as to the relative centralization or decentralization of various services. Will cafeterias be controlled centrally? Will textbooks be inventoried and managed by one person? If all personnel are retained, how should duties and responsibilities be distributed? What temporary positions may be useful to the merged school system initially, which later, if reduction in staffing is required, will not disrupt system operation?

SECTION IV

FINANCE

The school budget for Clifton Forge is prepared by the Superintendent and his staff, approved by the School Board, and submitted to the City Manager for inclusion in the city budget. It is then approved as a part of the overall city budget, incorporating adjustments made by City Council. Once approved and the money appropriated, the administration of the school budget is entirely a School Board matter.

The school budget for Alleghany County is handled in a similar fashion with the County Manager and Board of Supervisors substituted for the City Manager and City Council, respectively.

In each case, the governing body sets a tax rate each year that will generate enough revenue to finance the local portion of the approved budget. The funding provided by the city and county budgets represents only a portion of the total cost of education. Other funds, primarily state and federal, make up the remainder of the budget.

The basis for determining state aid is the Standards of Quality. Every two years the State Legislature designates a dollar amount per child which (theoretically) represents the cost of a "quality education." This figure is arbitrary and, in the past, has not represented the true cost of the Standards of Quality.

To compute state aid, the designated amount per child is multiplied by the enrollment in the school division. The product of these two numbers represents the cost of a minimum education program. The sales tax returned by the state to be used for schools is subtracted from this

amount and the remainder is provided by the State and the locality. The question then arises: What part of the remaining cost should be paid by the State and what part by the locality? The answer is based upon the composite index which reflects the relative ability of the locality to pay.

The ability of the localities to pay is based upon three factors: (1) the true value of real property, (2) the income of the local population, and (3) the sales tax receipts, with each weighted as to importance. Property value is weighted 50%, personal income is weighted 40%, and sales tax is weighted 10%. By adding the weighted ratios between the State and local property values, incomes, and sales tax, a composite index (.01 - 1.00) is established. The composite index represents the percentage of the specified cost of the Standards of Quality which the locality is obliged to fund.

In the case of Clifton Forge, the composite index is .4302, which means that the State will provide 57% of the set SOQ costs. The composite index for Alleghany County is .2894 which means that the State pays 71% of the established SOQ costs.

At the present time, two school systems cannot simply combine their composite index. Unless or until the legislature changes the law, or until the two governments merge, each political subdivision will have to use its own composite index. It is the recommendation of the consultants that the necessary steps be taken to introduce legislation which would deal satisfactorily with the composite index of systems that plan to consolidate. Such legislation, if properly worded, could be an incentive for small school systems to consolidate all over the State. At the very least, the legislation which authorized the merged school system should be accompanied by legislation including language which permits an "averaged

composite index." Even more desirable, however, would be legislation which would provide an incentive for merger. For example, such legislation might permit systems in the process of merger to be funded on the basis of the most favorable composite index of the merging districts for a period not to exceed three years. In effect then, there would be a financial incentive to merger without special fund allocation to support extraordinary costs associated with the merger. Clearly there would be some quid pro quo associated with such incentive, e.g. unless total governmental merger had accompanied the school merger some payback or "disincentive" would be extracted. In any event, every attempt should be made to have incentive funds built into the permissive legislation related to the merger. Since most Federal funds are categorical, their distribution would not greatly influence the economics of merger.

The development of an operational budget for 1982-83 can be as simple or as complex as the localities want to make it. A school budget should reflect the level of educational desires and aspirations held by a locality for its children.

Spending levels do have a relationship to quality education. High levels of spending will not ensure high quality. On the other hand, extremely low levels of spending will almost always preclude a quality program. As has been said earlier, both systems should be cognizant of the dangers inherent in a budget process which requires approval of two different governing bodies, the foremost concern being that one governmental unit could hold funding for the combined system at an inadequate level. It is beyond the scope of this report to suggest solutions for such possible problems, but we urge both bodies to give some thought to that area.

The two Superintendents should develop a budget for 1982-83 that they feel is needed to provide a quality education for the youth of Alleghany

County and Clifton Forge. After subtracting State and Federal aid to arrive at the amount which has been estimated, it should be included in the respective budgets of the local governmental units for use by the combined School Board and made available in scheduled installments by the governmental units. This might be accomplished by prorata vouchering at the end of each month or the transfer of funds from the county and city treasurer to a school division account on a scheduled (monthly/quarterly) basis.

Given the high cost of money (e.g. investment and interest opportunities), it is imperative that both governmental units supply funding support in such a way as to assure equity to those units. In addition, any variations in policy regarding money management which currently exist must be resolved (e.g. who invests what funds at what time, who reaps the benefit or interest on State funds provided they are not required immediately for operations).

Financial Planning - Action Steps

The following decisions should be in place prior to budget development.

1. Decision as to merged operation and extent of merger for school year 1982-83.
2. Assuming operational merger effective July 1, 1982, these decisions/actions will be necessary:
 - a. Agreement as to Board structure for management, policy making, decision making.
 - b. Designation of central administrative structure and appointments.
 - c. Approval of Salary-Benefits schedule, position authorization.
 - d. Review of transportation policy.

In order to assure orderly budget development these agreements/discussions should be concluded no later than February 1, 1982.

It is recommended that debt service not be incorporated in the combined budget development and that those obligations be retained by the separate governmental units unless and until some formal merger of governmental units takes place.

It is further recommended that once a budget has been developed for the merger of the combined systems that the per pupil cost for the merged systems be estimated on a per pupil cost basis and then translated to a dollar amount based upon the number of students served by the two jurisdictions. Local contributions should then be estimated by multiplying number of students by the cost per pupil less funding received from the State under the State Basic Aid formula, whether that be based on a differential or equal index. Once what is needed from local general funds has been determined, these general funds' needs should be submitted to the City Council and Board of Supervisors for inclusion in their budgets. It is hoped that many discussions will be held between Superintendents, Board Members, Council members and Supervisors throughout the budget preparation period so that no surprises will be forthcoming for anyone.

The method for computing local contribution is outlined under Option A in the figure which follows. This particular option assumes differential indicies and local contribution based upon the State's unwillingness to compute a uniform composite index for the merged systems.

Option B which is far simpler could be used when/if a uniform composite index has been approved.

Other options and adjustments are possible and may be appropriate during the first year's operation. For example, if no change is made in existing transportation policy, the total cost of transportation (and state

reimbursement) should be extracted from the formula. For further elaboration and options the Williamsburg-James City contract and budget document should be consulted.

It is the belief of the consultants, however, that fiscal merger should be as complete and equitable as possible with as few special exceptions and conditions as possible.

Figure 1

Option A

1. Estimated total budget of merged system	÷	Total number of students served	=	Estimated cost per pupil (merged system)
2. Number of students from sending school division	x	Cost per pupil (merged system)	=	Financing obligation of participating school divisions
3. Financial obligation of participating school divisions	-	State funds received by school divisions	=	Local contribution for participating school division

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Option B

1. Total budget for merged system	-	Total funds coming to merged school system	=	Local funds required
2. Local funds required	x	% of students from Clifton Forge	=	\$ Local funds required Clifton Forge
	x	% of students from Allegheny County	=	\$ Local funds required Allegheny County

*See also Section IV for illustration of Cost Comparisons

Section V

EDUCATIONAL PROGRAMS

In reviewing the curriculum available to students in the two school systems, considerable similarity exists. Students at Allegheny County High School naturally have a greater selection due to the larger number of students and teachers at that facility. Students in smaller schools generally have fewer elective options but often have the option available in greater depth due to staffing anomalies. For example, if a school can allocate only one or two faculty positions for electives, that school may provide four years of work in the designated elective and no opportunity in other areas. Another school with more diversified staffing may provide more variety across several electives but due to smaller initial enrollment may not be able to sustain enrollment in the area through the third and fourth years.

The work which follows is based upon the assumption that offerings available to students in the merged school system will be at least equal to what has been provided in the separate systems.

Below is a listing of courses which would be provided to students enrolled in the 8th grade using course names and labels from existing curriculum. Assuming a six period day, students would enroll in five required courses and one elective. Obviously several options to such a plan exist:

1. A seven period day could be utilized which would increase the number of electives at the 8th grade level.
2. Semester courses could be developed which would double or

quadruple the electives depending upon the six period vs. seven period decision.

These and other program options are clearly outside the scope of this report and are noted only to illustrate the kinds of options and decisions which remain. The decision not to offer foreign languages as an 8th grade elective is based partially on staffing and in large measure the fact that four years of a language would still be available in a 9-12 setting.

8th Grade Program

- Required - Science 8 (Physical Science?)
- Mathematics (Math 8, Pre-Algebra, Algebra)
 - Social Studies (Teenager & Law, Civics, Man and Society)
 - English 8
 - Physical Education and Health)

- Electives - Vocational Agriculture I
- Developmental Reading
 - Home Economics I
 - Art
 - Industrial Arts I
 - Music (Band and Chorus)

The High School Curriculum

Displaying the program options and course of study available to students at a school serving the students from both existing school divisions is a difficult task. The problems inherent in such an activity stem from the fact that the program available at any time is a product of resources available, accreditation standards, student needs and student interests. In some instances, available faculty resources/facilities rather than student needs or interests shape the program as well. For example, a school

system which has in its employ a faculty member qualified to teach English as a primary responsibility, but also certified to teach Spanish, may not be able to respond to student and parent requests for Latin. To do so would result in the under-employment of existing personnel, added cost to employ a part-time Latin teacher (if one could be found) and future commitments to a group of students who may lose interest in a specific subject as quickly as the interest evolved. It is not uncommon in these cases for a school division to acknowledge the importance of foreign language instruction and allocate resources to that function but compromise on the issue of which foreign language as a practical/economic consideration.

In addition, curriculum planning is dynamic. That is, the changing society, local concerns and external mandates all impinge on the development (and popularity) of program offerings. Finally, staffing (the availability of qualified personnel) and student interests (economic efficiency) are major determiners of curriculum.

The program of studies outlined below is based first on the existing offerings. Whether or not the conditions mentioned above would support the offerings in 1982-83 or beyond is a decision which can only be made once resources have been allocated and student needs and interests adequately assessed. It is not within the scope of this report to evaluate either the adequacy or appropriateness of the existing curriculum. The assumption has been made that these offerings, since they exist, are adequate and appropriate. The staffing requirements which follow the curriculum outline are based upon those assumptions.

9th Grade

- Required
- English
 - Social Studies (World Geography or World History)
 - Mathematics (Math 9, Pre-Algebra, Algebra I)

- Science (Biology or Earth Science)
- Physical Education and Health
- Electives - Foreign Language (Spanish/French)
- Vocational Agriculture
- Industrial Arts (World of Manufacturing/Construction)
(Basic Technical Drawing)
(Materials/Processes)
- Home Economics
- Journalism
- Developmental Reading
- Business Mathematics
- Art
- Music (Band/Chorus)

10th Grade

- Required - English 10
- Social Studies (World Geography/World History)
- Physical Education and Health
- Electives - Distributive Education
- Vocational Agriculture
- Home Economics
- General Business
- Typing
- Foreign Language (Spanish/French)
- Geometry
- Art
- Biology
- Developmental Reading
- Creative Writing
- Journalism
- Architectural Drawing
- Materials and Processes
- Music (Band/Chorus)

11th Grade

- Required - English 11
- U.S. History
- Electives - Foreign Language (Spanish/French)
- Creative Writing
- Journalism
- Developmental Reading
- Focus
- Algebra II - Geometry
- Chemistry
- Art
- Vocational Agriculture
- Home Economics - Foods
- Mechanical Drawing
- Distributive Education
- Sociology
- Music (Band/Chorus)

12th Grade

- Required - English 12
- U.S. Government
- Electives - Foreign Language (Spanish/French)
- Math 12
- Advanced Mathematics
- Trig/Analytical Geometry
- Physics
- Business Math
- Math 12 (Remedial)
- Art
- Home Economics
 - Interior Decorating
 - Foods
- Creative Writing
- Journalism
- Mythology
- Marriage and Family

- Family Living
- Sociology
- Music (Band/Chorus)
- Drawing
- Mechanical Drawing
- Distributive Education
- Focus
- Vocational Agriculture
- Developmental Reading

Clearly, some of the courses listed above can be combined. While efforts were made to match offerings in the two schools, it was not possible to determine if some courses were, in fact, sufficiently similar to merge without an examination of course content and syllabi. In addition, it appears as though some course work currently offered at Clifton Forge High School should not be continued since it duplicates functions, if not form, of work already available at the vocational school.

In any event, the analysis above does reflect a conservative approach to merger of the programs (there are probably more courses listed than should be). A thorough analysis of these courses and combinations will be required prior to program merger to assure that students do not find themselves enrolled in courses which duplicate previous work.

Another major curriculum policy issue relates to the amount of 8th grade work which will be offered in the high school. At an early date, the School Board must establish policy which determines how many courses an 8th grader must pass to be promoted to high school. The implications of such a policy decision are obvious. If a student passes two of four courses and is retained, are sufficient and appropriate resources and electives available at the 8th grade to serve the student? If the student is promoted, obviously at least one section of 8th grade work in each

subject area must be available at the high school level.

The two major activities which must be undertaken immediately then are:

1. Review of curriculum - merger of similar courses and elimination of redundant or unnecessary courses, and
2. Policy decisions regarding 8th-9th grade articulation.

The Board should also review graduation requirements for the two school systems and make sure that existing requirements are essentially the same. If they are not currently, they should be reviewed and a consistent policy established with provisions made to accommodate students in process.

It should be noted that curriculum articulation and merging of courses is not a simple undertaking. The instructional program for a school system is generally designed to meet specific objectives. Textbooks are selected, options provided, electives developed and teaching methods encouraged which are consistent with the school's philosophy regarding learning and the learner. Whether or not there exist major differences in the structure of the programs or the assumptions upon which they operate is not known. Such a possibility and the ramifications for program merger should not be overlooked however.

Co-Curricular Activities

School children and their parents place a high value on extra-class activities such as athletics, cheerleading, majorettes, annual staff, newspaper, forensics, student government, and special interest clubs. Careful attention should be given to ways and means of combining these activities. While the financial and administrative issues are important to adults, the harmony of the student body and smooth operation of the new school system will depend in large part upon how the students view the new operation and

their part in it.

The following principles should guide the reorganization of extra-curricular activities:

1. No student in an elected position should be required to relinquish that position before the end of his/her term.
2. For competitive positions, all students should have equal opportunity to try out, with the rules for selection clearly spelled out ahead of time so that the students know them.
3. For appointed positions, representatives of both high schools should participate in the selection of those students who will take office the following fall.

For the first year of operation, it is recommended that when feasible, co-captains, or co-leaders be named (football, etc.) For elected positions such as the president of student clubs and organizations, elections should be delayed until the Fall. Thereafter, the usual practice of holding elections in the Spring could be revived.

As soon as a decision is made to consolidate, a committee should be appointed to develop procedures for handling the whole extra-class activities program. The committee, consisting of students, parents, teachers and administrators from both systems, should meet throughout the 1982-83 school year with numerous opportunities for students to engage in cooperative activities such as fund raising, clubs, social activities, etc.

Instructional Personnel/Needs Assessment

This section consists of a chart showing the projected enrollment in each course, the number of teachers needed and the increase or decrease in personnel from current staffing.

<u>COURSES (9-12)</u>	<u>NUMBER OF STUDENTS</u>	<u>NUMBER OF SECTIONS</u>	<u>NUMBER OF TEACHERS</u>	<u>INCREASE/ (DECREASE)</u>
Eng 9	345	14	2 4/5	(2/5)
Eng 10	314	13	2 3/5	-
Eng 11	223	9	1 4/5	(1/5)
Eng 12	317	13	2 3/5	(1/5)
(s)Creative Writing	33	2	1/5	-
(s)Drama	7	1	1/10	-
(s)Mythology	14	1	1/10	-
Journalism	13	1	1/5	-
Dev. Reading	13	1	1/5	-
Annual Staff	15	1	1/5	-
Speech	30	2	2/5	1/5
Total English Dept. (9-12)				(3/5)
French I	25	1	1/5	-
French II	26+	2	2/5	1/5
French III	?	1	1/5	-
French IV	?	1	1/5	1/5
Spanish I	?	2	2/5	(-1)
Spanish II	?	3	3/5	-
Spanish III	?	1	1/5	-
Spanish IV	?	1	1/5	1/5
Total For. Lang. (9-12)				3/5
World Geo.	202	8	1 3/5	(1/5)
Humanities	24	1	1/5	(1/5)
World Hist.	163	6	1 1/5	(1/5)
U.S. Hist.	286	11	2 1/5	(1/5)
U.S. Govt.	317	13	2 3/5	-
Soc.	57	2	2/5	-
Focus (Core)	100	4	-	-
Adv. Soc. St.	?	1	1/5	-
Total Soc. St. (9-12)				(4/5)
Cons. Math	16		1/5	-
Math 9	124	6	1 2/5	(1/5)
Pre-Alg.	70	3	3/5	-
Math 12	3	1	1/5	-

<u>COURSES (9-12)</u>	<u>NUMBER OF STUDENTS</u>	<u>NUMBER OF SECTIONS</u>	<u>NUMBER OF TEACHERS</u>	<u>INCREASE/ (DECREASE)</u>
Alg. I	204	8	1 3/5	-
Alg. I-I	63	3	3/5	-
Alg. I-2	65	3	3/5	-
Alg. II	126	6	1 1/5	-
Geom.	135	6	1 1/5	-
Trig./Analy.	38	2	2/5	-
Adv. Math	19	1	1/5	(1/5)
Total Math				(2/5)
Science 9	61	4	4/5	-
Biology	318	13	2 3/5	-
Chemistry	110	5	1	1/5
Physics	40	2	2/5	-
Adv. Biology	21	1	1/5	-
Total Sciences				(1/5)
Gen. Bus.	119	5	1	-
Bus. Math	41	2	2/5	(1/5)
Typing I	176	6	1 1/5	(1/5)
Personal Typing		1	1/5	-
Pers. Rec. Kpg.	13	1	1/5	-
Library Science	-	-	-	-
Total Bus.				(2/5)
Phys. Ed. 9	316	10	2	(1/5)
Phys. Ed. 10	261	9	1 4/5	(2/5)
Adv. Phys. Ed.	32	1	1/5	-
Total PE				(3/5)
Vo-Ag. I	44	2	2/5	-
Vo-Ag. II	34	2	2/5	-
Vo-Ag. III, IV, V	23	1	1/5	-
DE I	18	1	1/5	-
DE II	17	1	1/5	-
DE III	15	1	1/5	-
H. Ec. I	94	5	1	-
H. Ec. II	69	3	3/5	-
H. Ec. III	11	1	1/5	-
(s)Family Living	20	1	1/10	-
Marriage & Family	17	1	1/5	-

<u>COURSES (9-12)</u>	<u>NUMBER OF STUDENTS</u>	<u>NUMBER OF SECTIONS</u>	<u>NUMBER OF TEACHERS</u>	<u>INCREASE/ (DECREASE)</u>
(s)Foods	15	1	1/10	-
Int. Dec.	9	1	1/5	-
Mat./Constr.	51	2	2/5	-
Basic Tech. Dr.	71	4	4/5	-
Arch. Dr.	38	2	2/5	-
M.D. III	10	1	2/5	-
Ind. Draft.	-	-	-	-
World of Manu.	38	2	2/5	-
Wood I	24	2	2/5	-
Wood II	23	2	2/5	-
Wood III	15	1	1/5	-
Voc. Shop.	13	1	1/5	(1/5)
Total Voc.				(1/5)
Art I	98	5	1	-
Art II	49	3	3/5	-
Art III	19	1	1/5	-
Total Art				-
(s)Gen. Music	15	1	1/10	-
Int. Band		1	1/5	-
Adv. Band		1	1/5	-
Choir I		1	1/5	-
Choir II		1	1/5	-
Total Music				(9/10)
Special Ed.	10		3	-
Special Ed.	5			-
Total Special Ed.				-
Grand Total				(19/5) or 3 4/5 teachers

The totals above, except for the last column, are meaningless because of semester courses, released work time, and central vocational school. The last column indicates the change in need for instructional personnel. Assuming that five periods is a full-time assignment, it appears that there would be a need for three and four-fifths ($3\frac{4}{5}$) fewer teachers, keeping in mind, however, that reducing by that number may not be practical. For example, in French and Spanish the figures show that three-fifths ($\frac{3}{5}$) of a teacher less is needed. On the other hand, unless a French or Spanish teacher with multiple certification is on the staff, it may be necessary to reduce the offering, or reduce the class size and the extra three-fifths ($\frac{3}{5}$) of a teacher.

It is recommended that no reduction of the teaching staff be attempted for the first year of consolidation. This would provide time to adjust the course offerings to the needs of students, give the students a chance to rethink their selection of courses and provide more opportunity for any reduction in staff to occur by attrition.

It is further recommended that one of the first actions of the new Board be that of appointing a committee to review and resolve issues relating to curriculum.

SECTION VI

PERSONNEL

One of the most critical immediate problems which must be dealt with in the merger of the two school systems is the area of personnel administration and policies/procedures related to the personnel function.

While variations in practice and policy between the Clifton Forge and Alleghany County school systems are not major, they are of critical importance. Given the potential impact of teacher morale on the quality of instructional programs and the extent to which currently employed personnel will stimulate support of or resistance to the merger, early resolution of issues in this area may spell the difference between success or failure of the merger.

School Staffing

As indicated in Appendix I, the current staffing profile for the two school divisions varies significantly as would be expected in the comparison of any two systems with similar size characteristics. While some of the variations can be accounted for by size alone, others may be due to either policy or practical considerations. It is not possible, for example, to determine whether personnel allocation practices in the two school divisions have been based upon policy or relative financial impact. The addition of one teacher in a four million dollar budget obviously has less impact than the addition of that same teacher in a one million dollar operation. The result of such a decision would, likewise, have dramatically different impacts on teacher-pupil ratios (e.g. with approximately 300 students at one grade level, a school board decision to eliminate one

teacher [from 12 to 11] would increase class size from 25 to 27.5. In a school division with 63 students at the same grade level, the same decision results in class size increase from 21 to 32 students. Obviously the larger the number of students, the more subtle the impact of staff additions or deletions.

The section of this report dealing with programs, services and curriculum suggests that approximately five teachers may be "saved" by merger of the two systems. This projection is based on "steady state enrollment" - the assumption that numbers of students in the merged system will remain constant - and the assumption that offerings provided in the merged system will incorporate all programs and services currently offered in either system. The School Board could, of course, make the policy decision to distribute these resources across the courses proposed with a resulting reduction in class size or investment of the "saved" personnel resources in expanded services and programs.

The recommendation of this report is to maintain the current level of staffing for one year (adjusted for enrollment growth or decline -- which is a separate issue) while the School Board deals with the policy issue of how to utilize "potential savings," an issue which no doubt will be influenced by the fiscal conditions of the two localities and the governing bodies which control the funding. Should the decision be made to reduce personnel, the recommendation is to apply reduction in force policies only when/if attrition does not occur in the staffing areas deemed to be "oversupplied" and only after a one year period of "shake down."

Assignment of Personnel

A more pressing concern is the selection of personnel to carry out functions which, by their nature, no longer require duplicated services.

It is assumed that the merger of the two systems will require only one superintendent, one clerk, one special education director, one high school principal, one football coach, one high school department head for English, etc. Assuming further that the merged school system elected to operate one high school and one transition (8th grade) school, how will faculty be assigned to those facilities, particularly when in the past assignments have been across multiple grade levels to programs (e.g. science, industrial arts, social studies, etc.) and not to grades uniquely?

While a matter for local decision, a number of suggestions are offered here which have proven useful in systems which have consolidated, closed facilities or staffed a new building.

In order of preference, school employees usually elect security over assignment. If the merged school system guarantees employment for one year (all that can be done legally) and expresses commitment to RIF over a two-three year period based upon attrition (recognizing that declining enrollment and fiscal constraints may limit such an expression to good faith), most current employees will have their basic concerns addressed.

Since the current plan is to operate two high schools during the first year of the merger, little is at stake in the merger for personnel currently employed. However, once the School Board has authorized positions for a consolidated program (which may employ fewer personnel), great concern will be expressed about both procedure and equity. All that can be assured is that the merged system will exercise appropriate practices in every way to assure that those who aspire to any position have an equal opportunity to compete for the position on an equitable basis.

Recognizing that the Board has a right and responsibility to assign the most qualified personnel to all positions, it is recommended that the positions affected by the merger be identified and listed with the

understanding that any employee of either school system who is interested and qualified may apply for the position. The announcements should also indicate that positions will be filled by interested and qualified applicants currently employed by one of the two systems unless no person from within is qualified or interested. Especially crucial is the listing of each position for which appointments are made annually and supplements paid. A possible form for soliciting interest in positions is attached for illustration purposes.

Once expressions of interest have been received from personnel in the two school systems, the two superintendents and high school principals should schedule interviews with those seeking positions and prepare a staffing recommendation for the operation of a total combined school program in 1983-84.

Sample Form for Soliciting Interest in Assignments

Name _____

Current Position _____

School _____

Teaching Assignment 1980-81:

1981-82:

Extra Curricular/Other Assignments 1982:

1. My preference for assignment in 1983-84 is:

(Please rate your choices 1, 2, 3)

A. Clifton Forge Building _____

B. County High School Building _____

C. No preference - wherever I am needed _____

2. My first choice of academic assignment is _____

3. My second choice of academic assignment is _____

(Please list general areas (e.g. Math, Science, Home Economics)
not specific courses (e.g. World Geography, Civics, etc.)

4. In addition, I would like to be considered for the following extra duty assignments:

County High School

Band _____

Chorus _____

Head Football Coach _____

Assistant Football Coach _____

J. V. Coach _____

Dept. Head English _____

Dept. Head Social Studies _____

Dept. Head Science _____

*Etc.

Clifton Forge School

Band _____

Chorus _____

Head Football Coach _____

Assistant Football Coach _____

J. V. Coach _____

Dept. Head English _____

Dept. Head Social Studies _____

Dept. Head Science _____

*Etc.

*Note

This listing will be completed when the School Board has identified the range and number of positions it wishes to fund and/or specify as annually appointed positions.

Staffing Procedures (Timing)

It will be extremely difficult but not impossible to implement a merged school program by the Fall of 1982. The sequence of events and the time established by the legislature for organizing the new school division will create certain problems with the contracting and assignment activities outlined in this section of the report. For example, teachers and other personnel must be employed prior to April 15. The merged school system will not come into existence until July 1, 1982. It does not seem reasonable for teachers to contract with a school division which will not be in existence to honor the contract. The merged system has no basis for entering into a contract until it is officially organized. The solution to this dilemma will probably require that contracts be drawn between existing school divisions and employees with the merged School Board ratifying commitments as a nearly first order of business at their July meeting. Other similar problems (e.g. bids and contracts) will require special planning and approval.

Personnel Procedures

While there are not significant differences in personnel procedures and practices between the two school divisions, it is critical that the two School Boards begin immediately to bring their policies and procedures together. Since neither school system employs a director of personnel, it is recommended that the Superintendent or his designate from each system along with a subcommittee from each School Board begin to examine both policies and procedures for recruitment, selection, supervision, reduction in force and salary/benefit practices to determine what changes must be made to bring the two systems into synchronization. While such an activity appears to be a relatively simple matter, there are certain matters of policy which may best be dealt with by the whole School Board or through

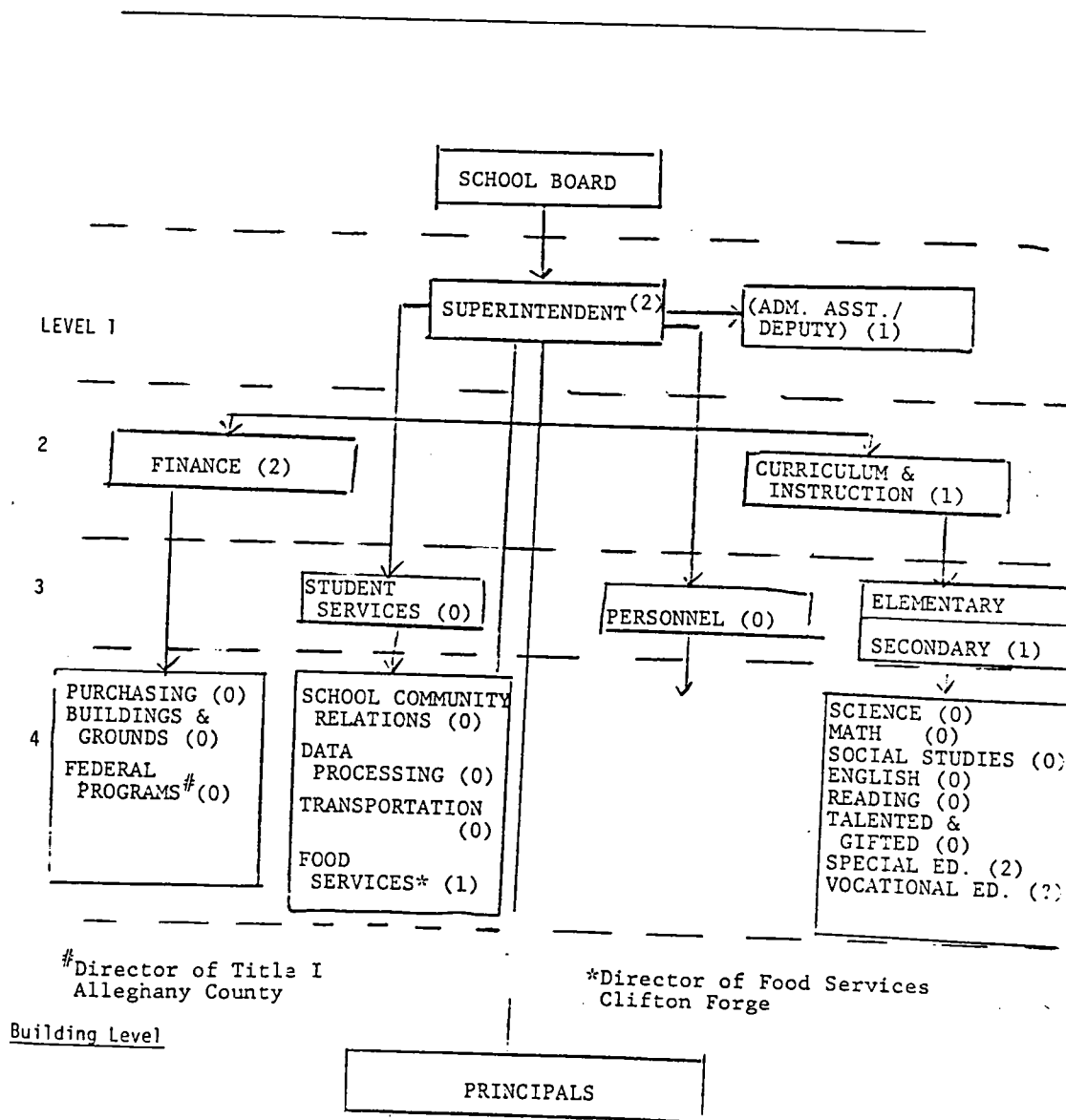
meetings of the combined Boards. For example, Alleghany County currently assigns a full-time principal to each elementary school and a full-time assistant principal to one school enrolling approximately 575 students. Clifton Forge, on the other hand, has one elementary principal assigned to two elementary facilities (with two head teachers) serving approximately 400 students. The School Board(s) should review the assumptions and guidelines which determine the assignment of administrative personnel to buildings to assure that these decisions are based upon some logical policy and do not become a topic of discussion regarding lack of equity based upon location of the facility. The guiding questions should be: How will the new school system administer the schools? What is expected of principals? What personnel resources should be allocated to this function? Not - Should each building have a principal?

Central Administrative Functions

The same kind of considerations must be reviewed regarding central administration staffing of the merged school division. Both school divisions currently assign personnel to the central operation of their respective school divisions. Neither, in the judgment of the consultants, have done so excessively. It is interesting to note that most school divisions generally develop their central office staffing by adding increments (personnel) in finance and instruction as the first iteration followed by directors of personnel and pupil services. Second tiers of directors, supervisors, coordinators, etc., usually evolve in data processing, school community relations, transportation, vocational education, special education, food services, purchasing, federal programs, buildings and grounds, and specialized academic areas. (See Figure 2).

While every school system carries out the functions described above, each does so uniquely. Since the number of personnel assigned to central

Fig.2 Illustration of Administrative Position Development



#Director of Title I Alleghany County

*Director of Food Services Clifton Forge

Building Level

office functions, is both a political and economic consideration, administrators in smaller school divisions are expected to carry out multiple functions. Administrative assistants are sometimes named to extend the Superintendent's multiple function assignment. Clerks of the Board become financial officers, directors and supervisors take on a variety of general functions.

The number of personnel which should be assigned to administer the merged system is both an economic and political question. How the personnel allocated to central administration and the directing, planning, organizing, monitoring and evaluating functions are assigned is very much a matter that the Board needs to deal with immediately. Clearly there is no need for the two Superintendents, two clerks and two directors of special education. Whether there is a need (or desire) for an equivalent number of personnel, will depend upon the School Board's assessment of level of services required or desired. (See Section III for additional discussion).

Salary/Benefit Considerations

While some differences exist between salary and benefit provisions of the two school systems, which must be adjusted prior to merger, the consequence of those adjustments to expenditures for the new system are not overwhelming. Salary and Benefits probably vary overall by less than two percent across the two divisions and can be brought into line with each other for less than five percent of total expenditures for all personnel. Assuming an increase in personnel costs for 1982-83 similar to the average for the past five years, the adjustment and conversion of benefits and salaries between districts can be accomplished at no real costs to the merged system above that which would have been expended anyway.

Illustration (assuming 8% salary/benefits increase for 1982-83) Teacher with Ten Years Experience						
1981-82	Benefits					
	Salary	Diff.	Ins.	VRS Life	Total	Diff.
Clifton Forge	13,992		1,248	100	= 1,348	
Alleghany County	14,300	(+308)	936		= 936	(-412)
Net Difference	308 - 412 = \$104 = 1%					
1982-83	Adjustment Costs					
	Salary	Benefits		Difference		
Clifton Forge	14,691	1,348		+699		
Alleghany County	14,691	1,348		+703	803	
Cost increased (including increments) = approximately 5%						

To be sure, there are other differences in benefits (e.g. sick days leave, retirements, buy-back provisions, holidays, etc.) which will need to be brought in line. These have only minor financial consequences, however.

Wages-Benefits Other Employees

Major differences exist in the structure of salary and benefits programs for administrators and classified personnel. While the fiscal consequences are relatively minor, it will be necessary for planners to agree upon the basis for reimbursement of various personnel. Both systems operate on a modified indexing plan which is keyed to the teachers base salary. While the Alleghany County approach appears to be based on a pre-determined ranking (value to the system) rationale, the Clifton Forge approach is based upon a reverse comparison to create an index (at least for administrators). For classified personnel, Clifton Forge depends almost exclusively upon an hourly rate comparison/computation system. Given the much smaller increments paid administrators in Clifton Forge but far greater number of steps (20 compared to seven in Alleghany County for

principals) serious policy review of the rationale for rewarding tenure and experience is indicated before any changes are implemented.

Likewise, classified personnel have a variety of "extras" or special conditions attached to certain positions which makes direct comparison by position almost impossible in this report. For example, there are instances of authorized extra hours, designation of head secretaries, foreman, etc., which will require review and clean up in order to bring the two systems in line. While the magnitude (in terms of dollars) in this area is relatively small, the problems in converting will be much more complex than those faced in merging the wages and benefits for professional personnel.

A final problem which must be resolved prior to merger is the matter of existing contracts held by each Superintendent which covers a four year period. While the two incumbents are in general agreement about the resolution of this phenomenon, there is, currently, a legal obligation to retain both as Superintendents of their respective school divisions. This problem should be addressed and resolved at the earliest possible date - either through resignation, negotiation or assignment of one incumbent to an associate position until the end of the term or some other mutually agreeable solution.

Summary

This section of the report attempts to highlight some of the major concerns and problems relating to personnel administration, planning and transition. The policy issues and recommendations are identified below which will require Board action.

1. All personnel currently employed should be retained for the first year of the merger (dismissal proceedings and enrollment decline-related RIFS not included). In other words, the merged school

system should reduce staffing consistent with current guidelines for RIF which would have occurred had merger not taken place. No personnel should be laid off the first year as a direct result of the merger except for attrition and/or unsatisfactory performance.*

2. Personnel not required after one year of the merger should be retained if financial conditions permit. The assumption here is that staffing will be reduced, if at all possible, through attrition. While such a recommendation implies a statement of intent, it is recognized that a number of factors (declining enrollment, economic considerations, and overstaffing in certain areas) may make this recommendation impractical.
3. Teachers holding tenure in either system should be granted tenure in the new system.
4. Board policy and procedures regarding personnel matters (e.g. recruitment, selection, supervision, evaluation) should be reviewed, revised and adopted by both school systems as early as possible but no later than May 1, 1982.
5. The two School Boards operating as a Committee of the Whole should review and approve basic changes in salary and benefits packages which bring the two districts in line. It is recommended that this action be taken independent of any discussion/negotiation with employee groups regarding employment conditions for 1982-83. While dialogue with employee groups is extremely important, the equalizing of basic contractual conditions, e.g. index, base salary,

*Note:

While this recommendation is not necessarily consistent with the consultants' position on the charge of assignment, we do believe it represents the position of School Board members, employees, school officials and other we talked with.

holidays, sick leave, dollar or percent insurance contributions, etc., must be accomplished by the School Boards as a first order of business. Following that activity, additional modifications may be proposed and adopted but those changes would be applied to the new single salary/benefits package rather than two separate packages.

6. The School Boards operating as a Committee of the Whole should review the systems's requirements for central administration -- coordinators, supervision and reporting -- and approve a central administrative structure for the coming year.

During the 1982-83 school year, the new School Board must deal with a number of personnel-related policies and decisions.

1. The School Boards must review their position viz a viz the importance or desirability of assigning a principal to each building, the conditions under which assistant principals are assigned and the philosophical underpinnings of reimbursement for administrative personnel, e.g. training, experience, length of contract, etc.
2. With the merger of student bodies to become effective for the 1983-84 school year, planning and staffing the program will be an important activity during the first year of merger. Policy decisions regarding allocation of faculty positions, minimum class size, range of activity programs at the two schools and other curriculum/program/service issues must be resolved. Following the development of a tentative academic program (curriculum) and a recommended extra curricular program, positions can be authorized to staff the approved programs. The Board will need to approve the number and type of teaching

positions as well as extra duty assignments (and supplemental pay schedules) for all positions within the system.

3. The School Board will need to establish or confirm procedures by which personnel within the district may apply for and receive equitable consideration for all positions in the school system in which they are interested and for which they are qualified.

The unique problem of contracting with employees for the coming 1982-83 school year must be resolved. The first problem is to make sure that those Board members who will constitute the "new" Board are aware of and supportive of personnel actions. The second problem is to determine a mechanism by which the goods and services of a "new" school system can be contracted for legally. One possibility is for the two School Boards, meeting as a Committee of the Whole, to approve the staffing recommendations submitted by the Superintendents and principals and determine which contracts will be written by which School Board. To simplify matters, the Clifton Forge board may wish to write contracts with the personnel assigned to the Clifton Forge location. Legal council should be sought to determine how to transfer contractual obligations to the new school system effective July 1, 1982. This unique circumstance may well be incorporated into the legislation as a way of ensuring the validity of the contracts, bids, and other continuing legal arrangements.

Table 1

SALARY AND BENEFITS ANALYSIS (TEACHERS)

<u>PA/BS</u>	<u>Allegheny County</u>	<u>Clifton Forge</u>	<u>Difference</u>	<u>Comparisons</u>
Start	\$10,848	\$10,640	\$192	<u>Salary @ 0, 10 and 21 Years</u>
Top	17,987	17,130	857	+192 Diff. (AC) Yrs. = 0
No. Steps	21	20	1 year	+300 Diff. (AC) Yrs. = 10
% Increments	(3/4/3.5/4.5)	(3/4/3.5/4.5)	Same	+857 Diff. (AC) Yrs. = 21
<u>Adv. Training Masters</u>				N Diff. 300+ Favor AC
	4 Steps	3 Steps		
	2241/448/672	224/672		
	\$1386	\$1320	\$ 66	
<u>Benefits</u>				<u>Benefits</u>
Health Ins.	75% S/Fam. Prem.	100%	\$ 25/mo. = \$300	\$400/Differential in Favor of Clifton Forge
VRS Life	-----	100%	\$10/mo. = \$120	
TWST Ins.	Yes	Yes		<u>Annual & Cumulative Day Buy Back</u>
Personal Lv.	3 days	3 days		Clifton Forge @ \$10 x 110 = \$1100
Vacations	N/A	N/A		Allegheny Cty @ \$ 5 x 60 = 300
Sick Leave	10-90	115-110		

SECTION VII

FACILITIES

The school facilities in Alleghany County, with the exception of the central office, are in very good shape - well built-and well maintained. The facilities in Clifton Forge are older, but usable.

No changes in the assignment of students in grades K-7 are recommended. In the County, the children are adequately housed, and will be so in the City as soon as the renovation of West Elementary is completed.

West End Elementary

This school is in the process of being renovated to provide nine regular classrooms for special education classes and administrative offices. This will give West End school a capacity of 265-310 students.

East End Building

This elementary building has 13 regular classrooms and eight modular units. This gives East End a capacity of 525-630 by continuing to use the modular units.

Clifton Forge High School

This building has a capacity of 450-500, with gym facilities at the armory being used. The facility is completely adequate to house the eighth grade program recommended in this report.

In grades 8-12, there is a need for reorganizing for the most efficient use of facilities, and providing the best learning environment for pupils.

A glance at the enrollment by grades provides an immediate clue to the most efficient pairing of grades with buildings:

<u>Grade</u>	<u>Clifton Forge</u>	<u>Alleghany County</u>	<u>Total</u>
8	67	294	361
9	59	283	342
10	76	237	313
11	77	186	263
12	73	254	327

The present Clifton Forge High School has been housing about 350 pupils. If all eighth grade students from both the City and the County were housed at Clifton Forge High, there would be about the same number of pupils there as in the past. The same is true for Alleghany County High with respect to grades 9-12.

The laboratories, libraries, cafeterias, gyms, restrooms and other central facilities should be adequate at both buildings for the foreseeable future.

It is recommended that the School Board consider assigning all eighth grade students in the merged school system to the facility currently serving the high school population in Clifton Forge. It is further recommended that the facility serving as the 8-12 school for Alleghany County be designated as a 9-12 school for the merged system.

Although the consultants did not inspect the facilities, it is understood that provisions have been made to upgrade the facilities for the School Board and central administration personnel to an appropriate level.

SECTION VIII
TRANSPORTATION

At the present time, Alleghany County transports approximately 80% of its students while Clifton Forge provides only limited transportation services (vocational and special education students).

In developing a transportation policy for the merged school division, the School Board will need to be alert to both equity and cost concerns. Assuming the operation of an 8th grade program in Clifton Forge and a 9-12 school at the Alleghany County High School location, there will be a need to transport some 300 students to Clifton Forge and approximately 280 students from Clifton Forge to the high school facility. These numbers do not represent actual increased transportation obligations since a number of students are already being transported to the Jackson River facility; a number of 8th grade Alleghany County students are being bussed past Clifton Forge to the high school and some high school students from Clifton Forge will probably transport themselves.

Regardless of that, a conservative estimate of students requiring additional transportation suggests a need to move 225-250 students each way under the proposed plan. Assuming use of buses both ways the merged school system may have a "three bus problem."

Computing the cost of new busses at \$22,000, the capital expense for additional transportation could be \$66,000. Annual operating expenses could be an additional \$35,000, of which approximately \$10,000-\$15,000 would be reimbursed by the State.

Estimated operating expenses are:

4 trips x 6 miles x 3 busses x 1.25 mile x 180 days = \$16,200, plus
3 drivers @ \$6,500 = \$19,500 for a total of \$35,700.

Thus the cost to the merged system for transporting secondary students only will be increased. A second major policy decision related to transportation of elementary students in Clifton Forge must be reviewed and costs estimated.

Regardless of the policy decision, the above costs are estimates based entirely on soft assumptions. It may be possible to transport all students using only currently available equipment through rescheduling the existing busses. There is little doubt, however, that additional costs will be incurred for increased student transportation.

The action steps recommended are:

1. School Board review existing state regulations for transportation to confirm what is required.
2. School Board review current practice to determine what is provided.
3. School Board establish policy as to what will be provided (equity) to students in the merged district (or develop options for costing).
4. School Board request staff to prepare cost estimate for new system of transportation or options.
5. School Board adopt option and include cost in budget planning documents.

At first glance, it would appear that Clifton Forge would be taking on the cost of a larger transportation system which it did not have before. This is not the case. Since each school system will be appropriating funds on a per pupil basis, the distribution of costs will be equitable.

Again, local policies should be established, as soon as possible, to cover all aspects of the combined school bus system.

SECTION IX

SUMMARY

The consultants would like to express thanks to many people for assistance in developing this report and the related recommendations. The members of the Clifton Forge City Council and the Alleghany County Board of Supervisors and their respective School Boards are to be congratulated for their leadership in this effort. Special thanks must go to Dr. Marty Loughlin and Dr. Mark Pace and their staff for providing the information and counsel without which this report could not have been completed. Finally, to the citizens and taxpayers of Alleghany County and the City of Clifton Forge for their input at the public meetings and their willingness to seek new solutions to persistent problems, thank you.

The material which follows is, primarily, a restatement of issues, options and recommendations found elsewhere in this report. It is included in this section to permit the reader easy reference to the major concerns and recommendations of this study.

ISSUES

1. School Board Representation (School Board Membership)

Options

- A. Representation based upon local funds contributed to operating budget (or percent of contribution to operating budget).
- B. Equal Representation.
- C. Representation based upon student population or student census.
- D. Representation based on population of political jurisdiction.

Recommendations

1. That School Board representation be based upon ratio of local funds contributed to annual operating budget with adjustments in School Board membership considered every three years.
2. That the merged School Board operate initially with all members of both Boards whose terms have not expired before July 1, 1982, serving until terms expire.
3. That the ratio of School Board membership be based upon a five member representation for Alleghany County and a prorated ratio representation for Clifton Forge.

2. Development of School Board Policy and Procedures Manual

Options

- A. School Board and staff review existing policy and procedures manuals. Identify differences, suggest appropriate policy language and seek School Board approval of revised manual.
- B. Contract with consultant to merge and update policy and procedures manual.

Recommendations

1. That the School Board and staff begin immediately to identify major differences which exist between the two policy and procedures manual.

2. That the combined School Board adopt policies and procedures which resolve obvious conflicts and amend for use either of the two existing policy and procedures manuals for operational use during the 1982-83 school year.
3. That the merged School Board contract with a private consulting firm or service agency (NSBA) to refine and upgrade the revised policy manual to incorporate policy decisions developed during the 1982-83 school year.

3. Moving From Legal Merger to Operational Merger

Options

- A. The school system, once becoming a legally merged operating unit, could attempt to merge all operations effective immediately.
- B. The school system could attempt to move toward operational merger in a series of steps (transition).

Recommendation

1. That the School Board move immediately to merge policy and administrative procedures as well as administrative personnel for the school system.
2. That the School Board delay merger of student bodies (grades 8-12), faculty assigned to those grades, extra curricular programs and transportation services for one year.

4. Central Administration of the Merged School Division

Action Required (Prior to 1982-83 School Year)

- A. Selection of Superintendent
- B. Organization of Central Staff (temporary)
- C. Assignment of Personnel to Functions (temporary)
- D. Merger of Salary/Benefits packages (temporary)
- E. Physical location of administrative offices
- F. Approval of Amended Board Policy/Procedures Manual (temporary)

G. Budget Preparation, Transmission, Approval

Action Required (Prior to 1983-84 School Year)

A. Physical transfer of records and central office personnel

B. Policy determination regarding:

1. procedures for allocating personnel

2. procedures for assigning personnel

3. administration of building units

4. curriculum articulation

5. transportation policy/staffing

6. food service policy/staffing

7. maintenance policy/staffing

8. programs and services

9. staffing

10. school names/colors/mascots, etc.

5. Financing the School System

Options

A. Total local revenues required could be charged back against the two local governmental units prorated by number of students from the two governments.

B. Local contribution adjusted by numbers of students and composite index adjusted the first year for differential service level (e.g. transportation).

Recommendations

1. Determine the total operational budget, excluding capital outlay, for the fiscal year for the consolidated division. Calculate all estimated state and federal categorical aid, and deduct this amount from the total expenditures, thus determining the basic operational cost. Divide this by the total number of students in ACM within the consolidated division. This will result in the per pupil cost

for which each locality shall be responsible for funding the basic program.

At this point, each separate governmental unit will apply its composite index to the number of its students in ADM, determining the portion per pupil they will receive from State Basic Aid, the state sales tax, and local appropriation to meet the total per pupil cost.

Using this method, the basic per pupil will be the same for both localities; however, the local appropriation to meet this cost per pupil will differ because of the difference in the state funding, based on the composite index, and the state sales tax.

EXAMPLE

TOTAL OPERATIONAL BUDGET (Excluding Capital Outlay) Consolidated Division		\$7,648,545.00
Categorical Aid		
State		-996,351.00
Federal		-366,443.00
NET OPERATIONAL COST TO COMPUTE PER PUPIL COST IN ADM		\$6,265,751.00
ADM		
Clifton Forge	800	
Alleghany County	3000	divided by
		3,800
PER PUPIL COST		\$ 1,648.38

DETERMINING LOCALITIES LOCAL APPROPRIATION

CLIFTON FORGE			Alleghany County	
State Basic Aid	\$439,898.00		\$2,209,597.00	
Per Pupil (800)	549.87	(3000)	736.53	
State Sales Tax	181,268.00		636,298.00	
Per Pupil				
Local Appropriation	697,936.00		2,100,750.00	
Per Pupil	872.42		700.25	

*Clifton Forge would pay \$172.17 per pupil more than Alleghany County from local appropriation due to the difference in the composite index.

*If transportation is not provided to Clifton Forge students during the 1982-83 school year, these costs would be apportioned to Alleghany County only.

6. Programs and Services

Action Required

- A. Development of 8th grade curriculum
- B. Development of 9-12 curriculum
- C. Policy regarding graduation credits
- D. Policy regarding 8th grade promotion
- E. Course and program articulation
- F. Extra-curricular policies and procedures
- G. Reimbursement and assignment procedures for extra duty personnel
- H. Transfer of personnel, equipment, supplies, materials
- I. Textbook adoptions
- J. Special Education, Vocational Education and special services personnel - allocation of personnel, range of services
- K. Determination of special services to be provided at 6th grade level

7. Personnel

- A. Elimination of duplicated administrative/supervisory positions and assignment of personnel to appropriate equivalent positions.
- B. Merger of salary schedules/benefits packages for all personnel (1983-84 school year).
- C. Development of mechanisms for contracting with personnel prior to formation of new school system.*

8. Transportation Services

Options

- A. Maintain transportation services as they currently exist with addition of services to transport students 8-12 as required.
- B. Provide transportation service to all students in merged school system based upon consistent policy.

*Note: Solicit legal counsel

Recommendations

1. Maintain transportation of students throughout the school division as is for one year with costs distributed to the two governmental units based upon that level of service.
 2. Develop cost estimates and plan for providing equitable transportation program throughout the merged school system in 1983-84.
9. Special Costs of Merger

Commentary

In addition to the many major issues addressed in this report, merger will require attention to numerous small details, many of which will require expenditure of public funds. Included in this area would be:

- a. school bus identification
- b. stationary, purchase orders, etc.
- c. scoreboards, athletic jerseys
- d. school name changes
- e. inventory and insurance modifications
- f. legal document review and revision.

Some of these items must be attended to while others may be delayed depending upon the concern expressed and relative cost/importance associated with the item. It is recommended that a committee be formed to develop a list of items which should be reviewed and a set of recommendations as to cost and timing/importance of such issues.

Appendix II

MATERIALS REVIEWED

Clifton Forge Personnel Directory, 1980-81/1981-82.

Clifton Forge 1980-81 Course Offerings and by Department descriptions of courses and sequences.

Clifton Forge 1981-82 Budget for Clifton Forge City Schools.

Benefits Plan - Clifton Forge, June 1980.

Clifton Forge Insurance Inventory - Value of Property.

Final Report: Consolidation Study Sub-Committee for Education, May 1976.

Alleghany County - Clifton Forge - Covington Public Schools: A Survey Report. George Peabody College for Teachers, Nashville, Tenn., 1973.

Minutes of Consolidation Study Group Meetings (1980-81) School Division Personnel (N.D.).

Consolidation Data - Alleghany County - Clifton Forge School Systems, May 1981.

Alleghany County Insurance 1980-81 Value of Building and Contents.

Alleghany County Budget, 1981-82.

Alleghany County Curriculum Guides, Grades 8, 9, 10, 11, and 12.

Program of Studies - Course Offerings 8-12.

Alleghany County 1981-82 Salary Scale.

Alleghany County 1980-81 Salary Scale and Personnel Directory.

Alleghany County Debt Service Report 1981-82.

Alleghany County Vehicle Inventory and Transportation Report (May 20, 1981).

Appendix I
Personnel Profile

Classification	Current Staffing (September 1987)		
	Clifton Forge	Alleghany County	Combined
<u>Administrative Personnel</u>			
Superintendent	1.0	1.0	2.0
Administrative Assistant	-	1.0	1.0
High School Principal	1.0	1.0	2.0
High School Asst. Principal	1.0	3.0	4.0
Elementary Principal	1.0 ¹	5.0	6.0
Elementary Asst. Principal	-	1.0	1.0
<u>Classified Personnel</u>			
Clerk	1.0	1.0	2.0
Cafeteria Manager	1.0 ²	-	1.0
Textbooks, Bookkeepers, Clerical	2.3 ³	2.7 ³	5.2
Mechanics	-	3.0	3.0
Drivers	1.0 ⁴	40.0	41.0
Maintenance Personnel	1.0 ⁴	8.5	9.5
Custodians	7.0	19.0	26.0
Aides	10.0	8.0	18.0
Secretaries	3.5	9.5	13.0
<u>Instructional Personnel</u>			
Directors/Supervisors	1.0 ⁵	3.0 ⁵	4.0
Elementary Teachers	29.5	102.0	131.5
Secondary Teachers	29.0 ⁶	65.0	94.0
Special Personnel	2.0 ⁷	-	2.0
<u>Other (Title I)</u>			
Directors/Coordinators	-	2.0	2.0
Teachers	2.0	1.0	3.0
Aides	1.0	1.0	2.0
Secretary	-	1.0	1.0
<u>Cafeteria</u>	6.0	- ³	N/A

¹ Clifton Forge assigns one principal to two schools and pays two head teachers @ \$1000/per school.

² Includes one textbook agent/secretary; one cafeteria/bookkeeper.

³ Includes one Deputy clerk; 1.2 clerical support; .5 textbook agent.

⁴ No regular maintenance personnel employed; 1.0 FTE contracted for.

⁵ Director of Special Education.

⁶ Director of Special Education; Director of Instruction/Elementary Education; Director of Secondary Education.

⁷ Speech Therapist; Special Education-VTE Resource Teacher.

⁸ Food Service personnel/programs administered at building level.

Appendix B
Resolution on Consolidation

EXCERPT FROM MINUTES OF A SPECIAL CALLED MEETING OF THE ALLEGHANY COUNTY SCHOOL BOARD ON DECEMBER 4, 1981:

By motion of Mr. Posey and seconded by Mr. Copenhaver, the following resolution was adopted:

RESOLUTION OF CONSOLIDATION

WHEREAS the County School Board of Alleghany County has approved (by a unanimous vote) consolidation of Alleghany County Public Schools with the Public Schools of the City of Clifton Forge,

BE IT RESOLVED that the County School Board of Alleghany County requests the Board of Education of Virginia to establish a consolidated school division for Alleghany County and the City of Clifton Forge to begin operation on July 1, 1982.

COPY TESTE:

School Board Clerk

Appendix C
Resolution on Consolidation

BOARD OF SUPERVISORS
COUNTY OF ALLEGHANY
Covington, Virginia

At an adjourned meeting of the Alleghany County Board of Supervisors held in the Board Committee Room, Basement of the Courthouse, Covington, Virginia at 7:00 P.M., December 7, 1981, the following action was taken:

<u>Present:</u>	<u>Vote</u>
Clarence W. Farmer, Chairman	Yes
M. H. Cahoon	Yes
Nancy M. Haynes	Yes
Janet D. Nelson	Yes
Harry A. Walton, Jr.	Yes

On motion of Mrs. Nelson, seconded by Mr. Cahoon, the following resolution was adopted:

BE IT RESOLVED by the Alleghany County Board of Supervisors that it hereby approves consolidation of Alleghany County Public Schools with the Public Schools of the City of Clifton Forge.

BE IT FURTHER RESOLVED that the Alleghany County Board of Supervisors requests the Board of Education of Virginia to establish a consolidated school division for Alleghany County and the City of Clifton Forge to begin operation on July 1, 1982.

A COPY TESTE:

Randal E. Arno
County Administrator

Appendix D
Resolution on Consolidation

RESOLUTION

WHEREAS, the City Council for the City of Clifton Forge desires to provide the best education possible within the financial resources of the community and

WHEREAS, the local cost for education has steadily increased over the past several years and

WHEREAS, consolidation of school districts has proved in some situations to be a solution to financial ills of small school divisions

NOW, THEREFORE, BE IT RESOLVED that the City Council for the City of Clifton Forge hereby approves the consolidation of the Clifton Forge City and Alleghany County School systems into one school division and

BE IT FURTHER RESOLVED that the City Council for the City of Clifton Forge hereby requests the Virginia State Board of Education to approve the consolidation of the Clifton Forge City School System with the Alleghany County School System effective July 1, 1982.

Adopted: December 7, 1981

Attest:

V. Craig Hudson
Clerk of Council

Appendix E
School Consolidation Agreement

MAJOR CONCERNS TO BE ADDRESSED IN AGREEMENT

FEBRUARY 2, 1982

The following are major concerns that should be addressed in the legal agreement establishing the consolidated school division. Some of these concerns have been informally agreed upon while are yet to be resolved.

1. Name of Consolidated School Division.
2. Formula for Determining Local Shares of Operating Budgets:

$$\frac{\% \text{ Pupils} + \% \text{ Real Estate Value} + \% \text{ Retail Sales Tax} + \% \text{ Personal Income} + \% \text{ Contribution to Last Budget}}{5}$$

$$\begin{aligned} \underline{\% \text{ Pupils}} &= \frac{\text{--- No. Pupils C.F.}}{\text{--- No. Pupils A.C.}} && \frac{\text{--- \% Pupils C.F.}}{\text{--- \% Pupils A.C.}} \\ & \frac{\text{--- Total Pupils}}{\text{--- Total Pupils}} \end{aligned}$$

Student numbers shall be those as reported to the Department of Education as of September 30 of the previous year.

$$\begin{aligned} \underline{\% \text{ Real Estate Value}} &= \frac{\text{--- Total Value of Real Estate C.F.}}{\text{--- Total Value of Real Estate A.C.}} && \frac{\text{--- \% C.F.}}{\text{--- \% A.C.}} \\ & \frac{\text{--- Total Value of Real Estate}}{\text{--- Total Value of Real Estate}} \end{aligned}$$

Real estate values as of December 30 of the previous year shall be used.

$$\begin{aligned} \underline{\% \text{ Retail Sales Tax}} &= \frac{\text{--- Total Retail Sales Tax C.F.}}{\text{--- Total Retail Sales Tax A.C.}} && \frac{\text{--- \% C.F.}}{\text{--- \% A.C.}} \\ & \frac{\text{--- Total Retail Sales Tax}}{\text{--- Total Retail Sales Tax}} \end{aligned}$$

Figures for the calendar year ending December 31 of the previous year shall be used.

$$\begin{aligned} \underline{\% \text{ Personal Income}} &= \frac{\text{--- Avg. Personal Income C.F.}}{\text{--- Avg. Personal Income Cov.}} && \frac{\text{--- \% C.F.}}{\text{--- \% A.C.}} \\ & \frac{\text{--- Total of Personal Incomes}}{\text{--- Total of Personal Incomes}} \end{aligned}$$

Personal average income for the year ending December 31 of the previous year shall be used.

% Contribution to Last Operating Budget = The percent contribution of each locality to the last operating budget.

3. Capital Settlement

- a) The school boards of Alleghany County and Clifton Forge shall contribute all land, building, and property held to the consolidated school division.

MAJOR CONCERNS TO BE ADDRESSED IN AGREEMENT (continued)

- b) Local shares for purchase of land, construction, renovation, or major alteration of buildings by the consolidated school board shall be the same as the percentage each contributed to the operating budget of the year the capital project was approved by the governing bodies.
4. Dissolution of Consolidated School Division

When a member desires to withdraw, and thus dissolve the consolidated school division, notice must be given by July 1, three (3) years prior to the intended year of withdrawal. All land, buildings, and improvements made to same shall be returned to the school board of the jurisdiction in which the property is situated. The school board receiving property or improvements to property purchased or improved by the consolidated school board under section 3, shall reimburse the other school board their original contribution to the project less 10% for each year the property was used by the consolidated school board.
5. Composition of Consolidated School Board.
6. Treasurer for Funds.

THIS AGREEMENT, Made and entered into this 30th day of June, 1982, by and between the SCHOOL BOARD OF ALLEGHANY COUNTY, THE SCHOOL BOARD OF THE CITY OF CLIFTON FORGE, THE BOARD OF SUPERVISORS OF THE COUNTY OF ALLEGHANY, and THE CITY COUNCIL OF THE CITY OF CLIFTON FORGE.

W I T N E S S E T H

THAT WHEREAS, the School Board of the County of Alleghany, the School Board of the City of Clifton Forge, the Board of Supervisors of the County of Alleghany, and the City Council of the City of Clifton Forge agreed by resolution to request the Board of Education of the Commonwealth of Virginia to merge the school divisions of Alleghany County and Clifton Forge pursuant to Title 22.1 of the Code of Virginia; and

WHEREAS, the Board of Education of the Commonwealth of Virginia in December, 1981 agreed to such a merger and created one school division to serve the County of Alleghany and the City of Clifton Forge; and

WHEREAS, effective July, 1982, the two school boards will merge into the Alleghany Highlands School Board; and

WHEREAS, the parties hereto wish to set forth the agreement under which the Alleghany Highlands School Board will operate; and

NOW, THEREFORE, for and in consideration of the services to be rendered by the Alleghany Highlands School Board, the School Board of the County of Alleghany, the Board of Supervisors of the County of Alleghany, the School Board of the City of Clifton Forge, and the City Council of the City of Clifton Forge, the parties hereto, do agree as follows:

1) Revenue, Expenditures & Unexpended Appropriations. Any and all revenue/income shall be treated as revenues of the Alleghany Highlands School Board without regard to which local jurisdiction such revenues are attributed. Any and all expenditures excluding debt service and compensation to School Board members shall be made by the Alleghany Highlands School Board in a manner it deen to be in the best interest of the school system; should unexpended appropriated funds exist at the end of the fiscal year, such unexpended appropriated funds shall be returned to the County of Alleghany and the City of Clifton Forge in the same proportion as their local contributions for that fiscal year.

2) Local Contribution Formula for Operational Expenses. The annual contributions of the County and the City shall be determined on the basis of the following formula:

$$\frac{\text{Percentage of Students} + \text{Percentage of Real Estate Tax Base} + \text{Percentage of Local Sales Tax} + \text{Percentage Contribution to Previous Budget} + \text{Percentage Per Capita Personal Income}}{\text{Total}} \times 5 = \text{Percentage Local Obligation}$$

The "percentage of students" shall be the average daily membership as of December 1. "Average daily membership" shall mean the sum of the total number of students enrolled on each school day for the months of September, October and November of the current fiscal year divided by the sum of the number of school days contained in such months.

The "percentage of real estate tax base" for a jurisdiction shall be computed as follows:

$$\frac{\text{Real Estate Tax Base (including improvements) of Alleghany County} + \text{Real Estate Tax Base (including improvements) of Clifton Forge}}{\text{Total Real Estate Tax Base of Jurisdictions}}$$

Divide each jurisdiction's tax base by the total tax base for the two to determine the percentage "real estate tax base".

The "real estate tax base" shall be established after December 30 of each year based on the tax records of each jurisdiction as of December 30 of the most recently completed calendar year.

The "percentage of local sales tax" shall be computed as follows:

$$\frac{\text{Local Sales Tax (1\%)} \text{ Collected in Alleghany County} + \text{Local Sales Tax (1\%)} \text{ Collected in Clifton Forge}}{\text{Total Local Sales Tax Collection of Jurisdictions}}$$

Divide each jurisdiction's local sales tax by the total local sales tax to determine the "percentage of local sales tax".

Local sales tax figures for each jurisdiction shall be based on the most recent publication of the Tayloe Murphy Institute in Charlottesville prior to January 1 of the year in which the budget is being developed.

The "percentage of local per capita personal income" shall be computed as follows:

$$\frac{\text{Per Capita Personal Income of Citizens of Clifton Forge} + \text{Per Capita Personal Income of Citizens of Alleghany County}}{\text{Total Per Capital Personal Income of Citizens of Jurisdictions}}$$

Divide the per capita personal income of each jurisdiction by the total per capita personal income of all citizens in the two jurisdictions to determine the "percentage of per capital personal income".

Per capita personal income figures for each jurisdiction shall be based on the most recent figures available from the Tayloe Murphy Institute as of January 1 of the year in which the budget is being developed.

"Percentage contribution to previous budget" shall be the actual percentage of each jurisdiction's contribution to local cost of the school operation budget last approved by the jurisdiction.

3) Resolving Operation Budget Funding Disagreements. Both the County and City governing bodies shall approve the school operating budget, and any amendments thereto, which said operating budget and amendments shall be submitted by the Alleghany Highlands School Board on or before April 1st. In the event that the two governing bodies have not approved identical school operating budgets by May 1st, each body shall submit the budgetary amount that it favors to a committee consisting of the Chairman of the Board of Supervisors of Alleghany County plus one additional member from the Board of Supervisors, the Mayor of Clifton Forge plus one additional City Council member, and the Chairman of the Alleghany Highlands School Board. The committee shall be convened by the School Board Chairman and shall determine by majority vote which of the two amounts favored by the governing bodies, or a compromising amount, shall be recommended to the governing bodies. Such recommendations shall be made to the governing bodies on or before May 15th. Any committee member shall have the right to call into the meeting persons with expertise on budget matters. The governing bodies shall take final action on the operating budget by May 20th.

4) School Board Representatives. For the first two years of operation as the Alleghany Highlands School Board, the Board shall consist of five members from Alleghany County appointed by the Board of Supervisors and four members from Clifton Forge appointed by the City Council. Thereafter, the School Board will consist of five members from Alleghany County and three members from Clifton Forge. Terms of Board members shall be in accordance with Section 22.1-53 of the Code of Virginia.

5) Contribution of All Property to New School Division The School Board of Alleghany County and the School Board of Clifton Forge shall transfer title of all properties, real and other, held as of June 30, 1982, to the Alleghany Highlands School Board to be used for school purposes. In the event that certain property or properties are determined to be no longer needed for school purposes by the School Board, the School Board shall declare such property or properties surplus. Such property or properties will thereafter be returned to the governing body of the original contributing school division.

6) Debt Service The debt service obligations of the Alleghany County School Board and the Clifton Forge School Board as of June 30, 1982, will be assumed respectively by the governing bodies of Alleghany County and the City of Clifton Forge. Debt service obligations made after July 1, 1982 shall be approved by the governing bodies and will be maintained by the Alleghany Highlands School Board.

7) Capital Improvements The cost of all capital improvements of lands, construction, and associated professional fees will be allocated to the County of Alleghany and the City of Clifton Forge by application of the formula used to determine the local contribution for operational expenses for the year that such capital improvements are approved by the governing bodies.

For the purposes of this contract, capital improvements shall be deemed to include all land purchases and new buildings, additions to existing buildings, all other renovations and alterations to existing buildings requiring state approval, and vehicle and equipment purchases made as additions to inventory and not as replacement of inventory.

8) Merging of Textbook Rental Systems The School Board of Alleghany County and the School Board of Clifton Forge agree to contribute to the Alleghany Highlands School Board on June 30, 1982 all assets, books, funds, and equipment of their respective textbook rental systems.

9) Ancillary Contribution Any services and/or non-monetary contributions, such as use of office quarters and computer service, etc., which may be provided by either jurisdiction to the Alleghany Highlands School Division, shall be presumed to be donated until such time that the contributing jurisdiction serves written notice that a charge will be made for the service at a pre-determined future date.

10) Separation In the event that either governing body wishes to withdraw and thus dissolve the Alleghany Highlands School Division, written notice of intent to withdraw, accompanied by a plan of dissolution and liquidation of assests shall be given to the remaining governing body and the School Board at least three years prior to the contemplated date of such withdrawal. All costs associated with separation, including development of the plan of dissolution, shall be borne by the party wishing to withdraw. Separation shall occur on July 1 of the contemplated year.

Separation shall not occur unless, at least one year prior to the contemplated date of separation, or any extensions thereof, the governing bodies agree to a plan of dissolution and liquidation of assets. In formulating the plan of dissolution, the governing bodies shall equitably apportion assests to reflect contributions made at the time of consolidation and all capital improvements made thereafter. Agreement to the plan of dissolution shall not be arbitrarily withheld.

If the ownership of school property, real or personal, or the percentage interest therein cannot be determined or is in dispute, either governing body may petition the Circuit Court in the jurisdiction where the property or any part thereof lies to determine the ownership or proportional ownership, thereof.

WITNESS the following signatures and seals.

SCHOOL BOARD OF ALLEGHANY COUNTY

By  _____
Chairman

ATTEST:

 _____
Clerk

BOARD OF SUPERVISORS OF ALLEGHANY COUNTY

By  _____
Chairman


ATTEST:

_____ Clerk

SCHOOL BOARD OF THE CITY OF CLIFTON FORGE

By _____
Chairman

ATTEST:

 _____
Clerk

CITY COUNCIL FOR THE CITY OF CLIFTON FORGE

By  _____
Mayor

ATTEST:

_____ Clerk

Appendix F

Letter From S. John Davis - Creation of the New School
Division



COMMONWEALTH of VIRGINIA

DEPARTMENT OF EDUCATION

P.O. Box 6Q
RICHMOND 23216

December 28, 1981

TO THE:

Members of the General Assembly
Clerk of the School Board in Alleghany County
Clerk of the School Board in Clifton Forge City
Clerk of the Alleghany County Board of Supervisors
Clerk of the Clifton Forge City Council

On Friday, December 11, the Board of Education for the Commonwealth, in agreement with resolutions received from the Board of Supervisors and School Board of Alleghany County and the City Council and School Board of Clifton Forge City, approved a resolution abolishing the City of Clifton Forge School Division and the Alleghany County School Division and creating a single school division for the county and city. The resolution calls for this action to become effective July 1, 1982.

This notice is being sent pursuant to Section 22.1-25 of the Code of Virginia and is subject to further action by the General Assembly if its members so desire.

Sincerely,

 S. John Davis
Superintendent of Public Instruction

SJD:smm

cc: Chairman, Alleghany County School Board
Chairman, Clifton Forge City School Board

Appendix G
Key Actors - Worner's Interviews

Interviews of Key Actors
by the Worner Team
December 17-18, 1984

- Randy Arno, Alleghany County Administrator
- Janie Barnette, Alleghany Highlands School Board
- Ken Bryant, Citizen
- Les Cherry, Executive Secretary, Alleghany Chamber of Commerce
- Jack Copenhaver, Alleghany Highlands School Board
- Sam Cook
- Andy Drezer, Citizen
- Richard Flora, Covington City Manager, Former Clifton Forge City Manager
- George Goode, Mayor, Clifton Forge
- Dan Goose, Alleghany Highlands School Board
- Jack Hammond, Citizen
- Helen Kostel, Alleghany County School Board, Alleghany Highlands School Board
- Herbie King, Citizen
- Louise Mansfield, Teacher, Alleghany High School
- Dave Minter, Citizen
- Janet Nelson, Alleghany County Board of Supervisors
- John Reynolds, Assistant Principal, Alleghany High School
- J. S. Sanders, Citizen
- Michael Scott, Alleghany Highlands School Board
- Randolph Scott, Principal, Alleghany High School
- Jo Ann Smith, Teacher, Alleghany High School
- Harriet Snead, Teacher, Alleghany High School
- Joe Wood, Clifton Forge City Council
- John Woodyard, Citizen.

Appendix H
Interview Procedures - Worner's Team

INTERVIEW

1. Some three years ago, the Clifton Forge City Schools and the Alleghany County Public Schools were merged to become the Alleghany Highlands Public Schools.

...In your estimation how has that merger worked?

...What would you list as the most significant benefits of the merger?

...What would you list as the problems or deficiencies related to the merger?

...Do you think the quality of education has improved, declined or stayed about the same as a consequence of the merger?

...Do you think the cost is more/less/about the same as it might have been had there been no merger?

2. Much has been said and written about public schools over the last 24 months. Several national reports have been very critical about public education and have claimed our nation may be "at risk" as a result of the decline in quality of the schools nationally.

...How accurately do you believe those criticisms describe education in this school system? Explain...

...What do you believe are the strongest points of the school system here?

...What are the weakest?

...How would you say the schools here compare to schools in comparable sized communities around the state and nation?

...If you could increase the emphasis or make changes in one or two areas (in schools) what would they be?

...How would you rate the financial support of schools vs needs of the schools locally?

...If additional resources were available for schools where would you spend them...?

3. Do you have any other comments you would like to make about the Alleghany Highlands Schools, its programs or services?

THANK YOU FOR YOU TIME HAPPY HOLIDAY SEASON.....

ALLEGHANY HIGHLANDS SCHOOL SURVEY

December 17-18, 1985

Interview materials--

The following script should be reviewed and used as a basis for the interview. Interviewers may read the material or paraphrase as they wish. Please make sure that the two major areas of questioning are pursued with appropriate follow-up probing.. Suggested questions are provided.

Note-taking is encouraged. As unobtrusively as possible..

HELLO, MY NAME IS _____

Thanks for taking the time to meet with me today. I'm working as a part of a team assigned to interview people in the community who are knowledgeable about the Alleghany Highlands School System.

These interviews are being conducted to validate and extend upon a written survey which is being/was distributed through the school system on Monday. The surveys and interviews are an attempt on the part of the school system to do two things----

1. make an assessment as to how well the system is doing (or not doing) its job and
2. collect information about the direction people feel the school system should be following for use in planning by the school system.

You have been identified as a person who is especially well informed, likely to have such information and willing to share it.

I have only 3 or 4 questions which are essentially open ended. Your responses will be held in confidence unless you request otherwise. Before I start do you have any questions about the purpose of this study???

If questions--answer or clarify or indicate you don't know...

If no questions--move on to interview format....

Appendix I
Key Actors - Researcher's Interviews

Interviews of Key Actors
by the Researcher

- Carroll Beever, Citizen, Covington, February 21, 1987
- J. R. T. (Tate) Bowen, Anti-Consolidation Committee, Hot Springs, June 30, 1986
- Clarence Farmer, Chairman, Alleghany County Board of Supervisors, Covington, June 20, 1987
- Richard Flora, Covington City Manager, Former Clifton Forge City Manager, Charleston, S.C., June 20, 1987
- George Goode, Mayor, Clifton Forge, September 17, 1987
- Dr. Aubrey Hall, Clifton Forge School Board, Clifton Forge, December 15, 1987
- Helen Kostel, Alleghany County School Board, Alleghany Highlands School Board, Clifton Forge, May 8, 1985
- Martin Loughlin, former Superintendent, Clifton Forge Public Schools, Emporia, October 16, 1986
- Janet Nelson, Alleghany County Board of Supervisors, Covington, June 29, 1987
- Mark Pace, Superintendent, Alleghany Highlands Public Schools, Covington, January 8, 1985
- Michael Scott, Alleghany Highlands School Board, Clifton Forge, January 10, 1985
- Leonard Switzer, Citizen, Former Covington School Board Member, June 26, 1987
- Harry Walton, Alleghany County Board of Supervisors, Covington, June 10, 1987
- Connie Whalen, Alleghany Highlands School Board, Clifton Forge, May 14, 1987
- Joe Wood, Clifton Forge City Council, Covington, June 28, 1987

Other Interviews

- Sam Cook, Administrative Assistant, Alleghany Highlands Public Schools, March 20, 1985
- Elinor Downey, Clifton Forge Commissioner of Revenue, October 21, 1987

- Randy Scott, Principal, Alleghany High School, May 15, 1985

Appendix J
Researcher's Interview Questions

INTERVIEW QUESTIONS

1. Describe the environment which prompted the school consolidation study which resulted in the formation of a new school system. (financial, social aspects) - How did school consolidation become a topic of interest?
2. What were the school boards' responsibilities in consolidating school divisions?
3. What were the superintendents' roles in school division consolidation?
4. What was the relationship between the Clifton Forge City Council and the Clifton Forge School Board? The Alleghany County Board of Supervisors and the Alleghany County School Board?
5. Do you know of any trade-offs included in the consolidation package? For instance, did making city water available to the county play any part in consolidation?
6. Did the State Superintendent of Public Instruction and the State Board of Education have any effect on consolidation? Did the legislature?
7. What were the goals of school consolidation? Have they been or are they currently being accomplished? Do you consider consolidation effective? Why? What made it work/not work?
8. Why have we not achieved total governmental consolidation, or what would be necessary to achieve governmental consolidation? Would governmental consolidation enhance school consolidation? Why?
9. What have been surprises in the consolidation process? What have been unexpected pleasantries? Unpleasantries?
10. Describe the environment in the schools at the time immediately prior to actual consolidation. How were students, teachers, and administrators affected?

11. How were uncertainties allayed?
12. What have been the results, positive or negative, of consolidation?
13. How did the superintendent named to the new division bind two units into one, satisfy both school boards, the two governing bodies, and lead his internal and external publics to acceptance?
14. Do you expect Covington City Schools to consolidate with the Highlands in the next decade?

Appendix K
High School Survey

HIGH SCHOOL SURVEY

The purpose of this survey is to determine how students view their high school experiences and their high school in general. There are no correct responses to the following statements. We only hope that you will respond to each statement honestly. For each statement, please circle one of the choices provided.

SA	Strongly Agree
A	Agree
TA	Tend to Agree
TD	Tend to Disagree
D	Disagree
SD	Strongly Disagree

Please do not put your name on this survey form. No one in your school will ever be told how any individual responded to this survey, nor will it be possible for anyone to find out.

Thank you for your help.

Respondent Information:

1. Class: ___ Sophomore ___ Junior ___ Senior
2. Sex: ___ Female ___ Male
3. Curriculum: ___ Vocational ___ College Prep ___ General
4. Class Rank: ___ Upper 1/3 ___ Middle 1/3 ___ Lower 1/3

Statements:

- | | SA | A | TA | TD | D | SD |
|--|----|---|----|----|---|----|
| 1. There are enough courses and programs offered at this school to meet the needs of students who plan to go to a college or university. | | | | | | |
| 2. Students are not encouraged to participate in activities at this school. | | | | | | |
| 3. Punishment is the same regardless of who breaks the rules. | | | | | | |
| 4. Teachers here care more about good students and have less time for those who are less able. | | | | | | |
| 5. This school is a friendly place. | | | | | | |
| 6. There are enough vocational programs available to students of this school to meet the needs of those who want to prepare for work right after school. | | | | | | |
| 7. There have been times when students would have liked to participate in a club or activity but didn't because | | | | | | |
| a. of transportation problems | | | | | | |
| b. of not feeling welcome | | | | | | |
| c. of financial constraints | | | | | | |
| d. of time constraints | | | | | | |

9.	Students in this school usually come to class prepared.	SA	A	TA	TD	D	SD
9.	Teachers here don't expect enough in the classroom from students.	SA	A	TA	TD	D	SD
10.	Most students treat other students with respect at this school.	SA	A	TA	TD	D	SD
11.	There are enough special education programs and services at this school to provide for the students here who need those services.	SA	A	TA	TD	D	SD
12.	Too much emphasis is placed on extra curricular programs such as sports, clubs, music groups, dramatics, etc. in this school.	SA	A	TA	TD	D	SD
13.	The students in this school don't have respect for the teachers.	SA	A	TA	TD	D	SD
14.	Most of the teachers keep students informed as to how they are doing in the classroom.	SA	A	TA	TD	D	SD
15.	Students really feel like they are a part of this school.	SA	A	TA	TD	D	SD
15.	This school does not expect enough of students.	SA	A	TA	TD	D	SD
17.	It wouldn't make much difference to me if there were no clubs or activities at this school.	SA	A	TA	TD	D	SD
18.	Students in this school are generally well-behaved in school.	SA	A	TA	TD	D	SD
19.	Teachers at this school try to make sure students understand the courses they teach.	SA	A	TA	TD	D	SD
20.	Students who are "different" are looked down on at this school.	SA	A	TA	TD	D	SD
21.	What is learned at this school will be useful to the students later in life.	SA	A	TA	TD	D	SD
22.	Rules and regulations about student behavior and discipline are not well known or understood by the students here.	SA	A	TA	TD	D	SD
23.	Teachers at this school let students know what is expected of them in classes.	SA	A	TA	TD	D	SD
24.	Students are proud of this high school.	SA	A	TA	TD	D	SD
25.	Students work up to their ability in this school most of the time.	SA	A	TA	TD	D	SD
26.	Rules and regulations about student behavior and discipline at this school are reasonable.	SA	A	TA	TD	D	SD
27.	Teachers here are fair.	SA	A	TA	TD	D	SD
28.	Students enjoy attending this school most of the time.	SA	A	TA	TD	D	SD

29. There is too much emphasis on academic performance at this school. SA A TA TD D SD
30. Students show little respect for school property in this school. SA A TA TD D SD
31. Teachers at this school are not willing to help when students ask for it. SA A TA TD D SD
32. The people at this school care about students. SA A TA TD D SD
33. Students place more importance on grades than learning at this school. SA A TA TD D SD
34. Cheating is fairly common at this school. SA A TA TD D SD
35. Teachers at this school try to vary their instruction to meet individual needs of students. SA A TA TD D SD
36. Teachers at this school know well the subjects they teach. SA A TA TD D SD
37. Teachers at this school are interested in the courses they teach. SA A TA TD D SD
38. Teachers at this school are deserving of respect from students. SA A TA TD D SD
39. Students are often given the grades A, B, C, D, and Fail to denote the quality of their work. Suppose the services provided by the school were rated in the same way, what grades would you give them?
- a. How would you rate the food services at this school? A B C D E F
- b. How would you rate the Library and Media services at this school? A B C D E F
- c. How would you rate the teachers at this school? A B C D E F
- d. How would you rate the counselors at this school? A B C D E F
- e. How would you rate the administrators at this school? A B C D E F
- f. How would you rate this school overall? A B C D E F
40. Much of what we read in the newspapers and hear on television suggests that the public schools are not doing a very good job. That students are not being asked to work hard enough, that the quality of work and expectations have declined, that discipline is a problem and that generally public schools are failing in their mission.
- This statement is an accurate description of this school. SA A TA TD D SD

Appendix L
Annual Teacher Survey

ANNUAL TEACHER SURVEY

The following statements apply more or less to schools. Please indicate the extent to which you believe each applies to your school and to the Allegheny Highlands Schools in general. Please circle your response.

KEY:

SD = Strongly Disagree
D = Disagree

MD = Mildly Disagree
MA = Mildly Agree

A = Agree
SA = Strongly Agree

IN MY SCHOOL

SD	D	MD	MA	A	SA
1	2	3	4	5	6

IN MY SCHOOL SYSTEM

SD	D	MD	MA	A	SA
1	2	3	4	5	6

1	2	3	4	5	6	1. Teachers are committed and dedicated to students.	1	2	3	4	5	6
1	2	3	4	5	6	2. The administration provides clear directions and priorities.	1	2	3	4	5	6
1	2	3	4	5	6	3. Teachers get along well with each other.	1	2	3	4	5	6
1	2	3	4	5	6	4. Parents support the teachers in matters of instruction.	1	2	3	4	5	6
1	2	3	4	5	6	5. The community has a high regard for the school(s).	1	2	3	4	5	6
1	2	3	4	5	6	6. The administration provides support and encourages high quality instruction.	1	2	3	4	5	6
1	2	3	4	5	6	7. The curriculum is well organized.	1	2	3	4	5	6
1	2	3	4	5	6	8. Information about school policies and plans is effectively communicated to teachers.	1	2	3	4	5	6
1	2	3	4	5	6	9. Parents are interested in education and encourage their children to achieve.	1	2	3	4	5	6
1	2	3	4	5	6	10. Consolidation has not had much impact on me personally.	1	2	3	4	5	6
1	2	3	4	5	6	11. Consolidation will not make much difference in the next five years.	1	2	3	4	5	6
1	2	3	4	5	6	12. Teachers are not very much involved in program planning or curriculum decisions.	1	2	3	4	5	6
1	2	3	4	5	6	13. Administrators communicate effectively with teachers.	1	2	3	4	5	6

IN MY SCHOOL
 SD D MD MA A SA
 1 2 3 4 5 6

1 2 3 4 5 6
 1 2 3 4 5 6
 1 2 3 4 5 6
 1 2 3 4 5 6
 1 2 3 4 5 6
 1 2 3 4 5 6
 1 2 3 4 5 6
 1 2 3 4 5 6
 1 2 3 4 5 6
 1 2 3 4 5 6
 1 2 3 4 5 6
 1 2 3 4 5 6
 1 2 3 4 5 6
 1 2 3 4 5 6

- 14. Teachers need to be more active in community activities.
- 15. Parents are too much involved in school matters.
- 16. The school board is committed to high quality education.
- 17. The superintendent is a strong advocate for quality education.
- 18. The school board is well informed about what goes on in the school(s).
- 19. The quality of education has improved over the last three years.
- 20. Teacher morale is higher than that in most comparable school systems.
- 21. Teachers are not well informed about what is happening in other schools in the system.
- 22. Teachers are willing to participate in curriculum planning and evaluation.
- 23. More time and energy should be devoted to staff development activities.
- 24. There needs to be more consistency in programs from grade to grade and school to school - too much "do your own thing."
- 25. I feel good about my association with education in this school/county.

IN MY SCHOOL SYSTEM
 SD D MD MA A SA
 1 2 3 4 5 6

1 2 3 4 5 6
 1 2 3 4 5 6
 1 2 3 4 5 6
 1 2 3 4 5 6
 1 2 3 4 5 6
 1 2 3 4 5 6
 1 2 3 4 5 6
 1 2 3 4 5 6
 1 2 3 4 5 6
 1 2 3 4 5 6
 1 2 3 4 5 6
 1 2 3 4 5 6
 1 2 3 4 5 6
 1 2 3 4 5 6

PLEASE CHECK:

- Administrator
- Teacher
- Other
- Elementary Level
- Secondary Level
- Other

Appendix M
Final Plan for Appointing Committees

Alleghany Highlands Public Schools

OFFICE OF THE
SUPERINTENDENT

110 ROSEDALE AVENUE
COVINGTON, VIRGINIA 24426
703-962-3969

September 20, 1982

TO: All Committee Members
FROM: E. Mark Pace, Superintendent
SUBJECT: Meeting Date

I would like to express appreciation in behalf of the School Board for your willingness to serve on one of the Committees for Renaming the Middle and Secondary Schools, School Colors, and School Mascots for the schools which will be opening in the fall of 1983. You will be engaged in a very important activity that will have a great deal of meaning in our efforts to consolidate and reorganize the schools.

The first committee meeting will be held at Alleghany County High School on Wednesday, September 29, at 7:00 P.M. The following rooms have been assigned:

Room No. 115 - Committee for Renaming Schools
Room No. 116 - Committee for Selecting School Colors
Room No. 117 - Committee for Selecting School Mascots

After the individual committees have met, a public hearing has been scheduled for 7:30 in the high school auditorium. This will provide citizens of Alleghany County and Clifton Forge an opportunity to have input by voicing their opinions to the Steering Committee relative to these important issues.

I shall look forward to seeing you on the 29th. Thanks again for your willingness to serve.

EMP/sa

Encs.

Serving The City Of Clifton Forge And The County Of Alleghany

Alleghany Highlands Public Schools

OFFICE OF THE
SUPERINTENDENT

110 ROSEDALE AVENUE
COVINGTON, VIRGINIA 24426
703-962-3969

September 20, 1982

NEWS RELEASE

Dr. Aubrey C. Hall, Chairman of the Steering Committee for Naming the Middle School and High School, School Colors, and Mascots for the Alleghany Highlands School System, announces that a public hearing will be held on Wednesday, September 29th, at 7:30 P.M., at Alleghany County High School.

All citizens of Alleghany County and Clifton Forge are encouraged to attend this hearing in order to have input into the selection of the names, colors, and mascots for the middle and high schools which will open in the fall of 1983.

EMP/sa

Alleghany Highlands Public Schools

OFFICE OF THE
SUPERINTENDENT

110 ROSEDALE AVENUE
COVINGTON, VIRGINIA 24426
703 962-3969

MINUTES

Steering Committee for Renaming Schools, Colors, and Mascots

Date and Place: Tuesday, September 14, 1982, 7:30 P.M.
The First National Bank, Clifton Forge, Virginia

Present: Aubrey Hall, Chairman, Steering Committee
Jim Snyder, Chairman, School Names Committee
Harrison Fridley, Chairman, School Colors Committee
Herbie King, Chairman, School Mascots Committee
Members of the Press

The meeting was called to order by the Chairman.

Dr. Pace expressed appreciation in behalf of the School Board for their acceptance of the responsibilities involved in serving as the chairmen of these committees. He reviewed the procedures and guidelines set up by the School Board and distributed a list of the people who had agreed to serve on each committee.

The Steering Committee agreed to the following:

1. To hold a public hearing for public comment on naming the schools, colors, and mascots at Alleghany County High School on Wednesday, September 29, 1982, at 7:30 P.M.
2. That each sub-committee would meet at the High School at 7:00 P.M.
3. To hold a Steering Committee meeting at the First National Bank, in Clifton Forge, on Wednesday, October 13, 1982, at 7:30 P.M.

Dr. Pace informed the committee that the staff contact person would be in touch with them reasonably soon.

The meeting was adjourned.

EMP/sa
9/15/82

Serving The City Of Clifton Forge And The County Of Alleghany

COMMITTEE FOR RENAMING
THE MIDDLE SCHOOL,
THE SECONDARY SCHOOL,
SCHOOL MASCOTS, SCHOOL COLORS

The Allegheny Highlands School Board will name a committee to rename the middle school, the secondary school, school mascots, and school colors. The total committee, under the direction of a steering committee, is charged with bringing recommendations regarding the aforementioned changes to the School Board by November 1, 1982.

Committee members will be representatives from the community, students, patrons, and school personnel, allowing for a broad-base of input into the recommendations of the committee. The School Board will appoint the committee chairmen who will form the steering committee.

The committees and their composition follow:

<u>School Name</u> - Jim Snyder, Chrm.		Laura Mitchell (AC)
SCA - (2)	Representative(s)	Liza M'ays (CF)
Governing Bodies - (2)	"	Joe Wood (CF) Janet Nelson (AC)
Chamber of Commerce - (1)	"	David C. Minter
High School Principal - (2)	"	Roy Putnam, Randy Scott
Teachers - (2)	"	Mike Farrar (CF)
Bill Hodges, Contact Person		Charles Holbert (AC)
Community Action Council (1)		Ms. Thelma Bradley
<u>Colors</u> - Harrison Fridley, Chrm.		
Junior Class Presidents - (2)	Representative(s)	Lisa Linkenhoker (CF)
Athletic Representatives:		Rusty Brown (AC)
Male - (1)	"	Peter Kostel (CF)
Female - (1)	"	Sharon Terry (AC)
Quarterback Club - (1)	"	Bob Deaton (CF)
Colt Club - (1)	"	Richard Zgol (AC)
Band Parents - (2)	"	Mack Humphries (AC) Bill Monroe (CF)
Governing Bodies - (2)	"	Russell Smith (CF) Nancy Haynes (AC)
Sam Cook, Contact Person		
Community Action Council (1)		Ione Callender
<u>Mascots</u> - Herbie King, Chrm.		
Band Presidents - (2)	Representative(s)	Anne Van Beek (CF)
Parent Advisory - (2)	Meriam Carpenter (AC)	Bill Taylor (AC)
H.S. Assistant Principals - (2)	"	John Reynolds (CF) Tom Dean (CF)
Athletic Representatives:		Eddie Rhea (AC)
Male - (1)	"	David Marcontell (AC)
Female - (1)	"	Dana Goode (CF)
Pansy Clifford, Contact Person		
Community Action Council (1)		
Colt Club (1) Quarterback C. (1)		Tom O'Meara - Qtrbk Clu

The guidelines for the selection of the work of the committee follow:

1. Recommendations of the committee are advisory to the School Board.
2. The various groups which will be asked to provide representatives to work on the committee will receive a request from the Superintendent to inform him of the person(s) by September.

(2)

3. An adult will be appointed by the School Board to chair each sub-committee. This person will serve on the Steering Committee. A student will be elected by the Committee to serve as co-chairman of each committee. A secretary will be elected by each committee. The secretary's responsibility is to keep minutes of each meeting. (Typing service will be available in the School Board Office.)
4. The committees must address the cost impact of their recommendations and report the estimated cost of final recommendations.
5. The committee should strive for concensus on recommendations; however, a simple majority shall constitute agreement.
6. Those people in attendance at a meeting shall constitute a quorum. School Board office personnel will serve as contact people. They will be non-voting participants.
7. The time frame in which this committee will function follows:
 - September - Meeting of the Steering Committee to determine:
 1. Schedule of Steering Committee meetings
 2. Schedule of sub-committee reports to the Steering Committee
 3. Procedures to be followed by sub-committees in submitting reports
 - September - First meeting of the entire committee
 - November 1- Present recommendations to the School Board.

EMP/sa
8/17/82

Adopted by Alleghany Highlands School Board - August 16, 1982

Appendix N
Schedule of Major Decisions

ALLEGHENY HIGHLANDS PUBLIC SCHOOLS
SCHEDULE OF MAJOR DECISIONS ON SCHOOL ORGANIZATION
OF THE MIDDLE SCHOOL AND HIGH SCHOOL
FOR 1982-83

The following provisions will serve as a guide in matters of assignment of certified personnel in the consolidated school division.

1. When a teaching or administrative position is advertised by the Allegheny Highlands School Division, applications will be received from only those persons who occupied a position, like the one being advertised, in Clifton Forge or Allegheny County. For example: If the position of Russian Language Teacher is advertised, only those persons who were Russian Language Teachers in Clifton Forge or Allegheny County may apply. Should both apply, a choice will be made between the two. Should only one apply, that person will be selected.
2. When a teaching or administrative position is established in the Allegheny Highlands School Division that is like a position in one or the other old school divisions (but not both), then the person who occupied such a position will be assigned. For example: Should the position of Russian Language Teacher be established and there was a person teaching Russian in Clifton Forge, but not in Allegheny County, then the person from Clifton Forge would be considered unless, the Russian teacher from Clifton Forge turned down the assignment.
3. Applications from persons outside the Allegheny Highlands School Division will only be sought when there are no applications from within the system from persons who were in a like position in Clifton Forge or Allegheny County.
4. Generally the same provisions as above will apply to the assignment of extra-curricular responsibilities; however, the administration reserves the right to make variances. Outside applications may be sought in the event that the best interests of the school division may be served by doing so.

Schedule of Major Decisions

- | | |
|-------------------|---|
| AUGUST
1982 | 1. Advertise High School and Middle School Principals - Superintendent |
| SEPTEMBER
1982 | 1. Name High School and Middle School Principals - Superintendent, School Board

2. Advertise Head Guidance at High School and Middle School - Personnel, High School Principal |
| OCTOBER
1982 | 1. Appoint committee or committees for re-naming schools, determining school colors, and mascots - High School Principal, Superintendent, School Board |

Schedule of Major Decisions
(continued)

2. Name Head of Guidance at High School and Middle School - Personnel, School Board
 3. Advertise Assistant Principal Positions - Superintendent - Personnel
 4. Advertise Head Football Coach - Personnel
 5. Advertise Girls' Basketball Coach - Personnel
- NOVEMBER 1982
1. Name Head Football Coach - Superintendent, Principal, Personnel, School Board
 2. Name Girls' Basketball Coach - Superintendent, Principal, Personnel, School Board
 3. Name Assistant Principals - Superintendent, Principal, Personnel, School Board
 4. Name High School and Middle School, Colors, and Mascots - School Board
 5. Establish Extra-Curricular Program for Middle School and High School - Principals, Secondary Supervisor, Superintendent, School Board
- DECEMBER 1982
1. Establish Curriculum - Secondary Supervisor, Principals, Superintendent, School Board
 2. Determine Teaching Personnel Needs - Personnel, Secondary Supervisor, Principals, Superintendent, School Board
- JANUARY 1983
1. Announce Teaching Positions in High School and Middle School - Personnel
 2. Receive applications through January 14 - Personnel
- FEBRUARY 1983
1. Advertise Head Basketball Coach - Personnel
 2. Advertise Head Girls' Gymnastics Coach - Personnel
 3. Advertise Head Wrestling Coach - Personnel
 4. Advertise Head Cheerleading Coach - Personnel
 5. Advertise Head Volleyball Coach - Personnel
 6. Advertise Indoor Track Coach - Personnel

Schedule of Major Decisions
(continued)

- MARCH
1983
1. Advertise Cross Country Coach - Personnel
 2. Teacher Assignment - Superintendent, Principal, Personnel
- APRIL
1983
1. Name Cross Country Coach - Superintendent, Principal, Personnel, School Board
 2. Appointment of All Certified Personnel - School Board
 3. Advertise Head Baseball Coach - Personnel
 4. Advertise Head Tennis Coach - Personnel
 5. Advertise Head Track Coach - Personnel
 6. Advertise Head Golf Coach - Personnel
 7. Advertise Head Softball Coach - Personnel
 8. Advertise Head Girls' Track Coach - Personnel
- JUNE
1983
1. Appoint Baseball, Track (Boys' & Girls'), Tennis, Golf, Softball Coaches - Superintendent, Personnel, Principal, School Board
 2. Appointment of Classified Personnel - School Board

NOTE : Extra-curricular assignments for the middle school will be added according to the extra-curricular program approved by the Board in November.

Appendix O

New High School Time Plan on School Organization, 1982-83

New High School
Time Plan on School Organization
1982-83

September

- a. Visit and confer with principals of consolidated high schools
 1. Pulaski County High School (1974)
 2. Spotswood High School (1980)

October

- a. Meet with both SCA presidents, sponsors, and athletic directors to coordinate cooperative activities/athletics for the remainder of the current school year and to begin drafting a new SCA constitution.
- b. Appear before both SCA organizations to discuss consolidation plans.
- c. Meet with faculties of ACHS and CFHS to review this plan.
- d. Work with Director of Instruction to design a secondary intent form for instructional/extracurricular personnel.
- e. Interview applicants for Director of Guidance of high school and coordinate a recommendation with the Director of Instruction.
- f. Meet with middle school principal, both athletic directors, and student representatives to determine an extracurricular program.
- g. Contact the Pioneer District and other schools regarding a football game to replace the Clifton game (number 2 spot).

November

- a. Meet with both athletic and band booster club presidents.
- b. Interview jointly with Superintendent and Director of Instruction for positions of assistant principals and coaches/sponsors.
- c. Set up parent socials in the evenings, one at each high school, to introduce new principal, assistant principals, director of guidance, and to discuss this plan.

December

- a. Notify VHSL of school name change.
- b. Purchase new high school stationery, envelopes, etc.
- c. Form the following advisory committees composed of equal representation from both high schools.
 1. School Ring/Seal/Yearbook (faculty & students)
 2. Student Attendance/Code of Conduct (faculty, parents & students)
- d. Meet with current cheerleader sponsors to design a tryout evaluation instrument and procedures.
- e. Principal and guidance staff explain new curricular offering to both student bodies by meeting with class levels at both schools on December 21.

January

- a. Guidance staff pre-registers students in current grades 8-11.
- b. Determine approximate number of teaching positions needed for next year.
- c. Director of Guidance and staff convene an evening meeting at each high school to discuss the new curricular course offering with parents.

February

- a. Coordinate interviews for coaching/sponsor positions with the Director of Instruction.
- b. Begin meetings with Superintendent, Director of Instruction, and Middle School Principal to review personnel intent forms and staffing needs of high and middle schools.
- c. Meet with new cheerleader sponsors to finalize tryout evaluation instrument and set up selection procedure/time table.
- d. Receive recommendation of the student attendance/code of conduct committee and propose a policy to the school board.

March

- a. Continue meetings to finalize certificated staffing of the high school.
- b. Receive recommendation of the school ring/seal/yearbook committee.
- c. Organize and administer cheerleading tryouts for two varsity and one junior varsity squads.

April

- a. Finalize recommendation for certificated staffing of the high school with the Superintendent and Director of Instruction.
- b. Distribute job descriptions and assign responsibilities to assistant principals.
- c. Form the following advisory committees composed of equal representation from both high schools.
 1. School Policy Handbook (faculty)
 2. Academic Honors (graduates/annual awards) (faculty, parents, students)
- d. Meet with assistant principal for activities/athletics to discuss athletic policy and the need to write a policy handbook.
- e. Continue interviews for coaching positions.

May

- a. Receive reports of the policy handbook and academic honors committees. Recommend a policy for each to the school board.
- b. Prepare a plan on staff development to be used during preschool conferences in August.
- c. Prepare a plan to paint certain areas of the school according to school colors, purchase cafeteria tables and chairs, etc.

June

- a. Finalize appointments to all coaching/sponsor positions.

August

- a. Implement staff development plan during pre-school conferences.

September

- a. Set up and manage elections of SCA officers, class officers, etc.

Appendix P
Composition of Consolidated board

3. PLAN FOR REVIEW OF PROPOSED PERSONNEL POLICIES

Dr. Pace stated that a copy of the proposed personnel policies has been sent to all Board members, one copy has been placed in each school, and a copy sent to each of the education associations. Each school and association has been asked to review and submit all comments in written form by Thursday, April 22, and these comments will then be duplicated and sent to all Board members. A time for review of these policies will be announced.

Dr. Pace gave a draft of the School Board By-Laws to each member and asked them to review and to write their comments on the draft.

4. COMPOSITION OF CONSOLIDATED BOARD

Mrs. Kostel reviewed the original plan to establish the membership of the new school board as five members from Alleghany County and five members from Clifton Forge for a period of two years. However, it has been learned that Section 22.1-53 of the Code of Virginia specifies that such a school board may not have more than nine members.

Dr. Hall made a motion that the School Boards recommend to their governing bodies that the Allegheny Highlands School Board be composed of five members from Alleghany County and four members from Clifton Forge for a period of two years, after which, composition would be based on the financial contribution of each jurisdiction.

The motion was seconded by Mr. Gross, and passed unanimously by the Boards.

5. SELECTION OF FISCAL AGENT

Dr. Pace stated that a fiscal agent, either the treasurer of Alleghany County or Clifton Forge, must be appointed in the very near future.

On a motion by Mrs. Janie Barnette, seconded by Mr. Posey, action was tabled until the next meeting in order for Dr. Pace to clarify some questions with the State Auditor's Office.

6. CENTRAL OFFICE ORGANIZATION

Dr. Pace stated that the consolidation and organization of the Central Office has been a question for some time and he hoped to have job descriptions for all positions in the Central Office by the next meeting.

Appendix Q
Course Enrollment Figures

COURSE ENROLLMENT FIGURES

Clifton Forge
High School

SUBJECT	1978-79	1979-80	1980-81	1981-82	1982-83	1983-84	1984-85	1983-84
<u>FINE ARTS:</u>								
Introduction to Art 8								
Art I	107	107	84	58	60	20	51	27
Art II			46	34	35	109	36	13
Art III	34	34	13	12	12	18	16	10
Art IV								
Intermediate Art			36					
Senior Art	39	41	18	12	14	23	22	
Introduction to Art	21	18		38	50	7	34	
Band 8						61	49	
Band-Intermediate	45		40	58		8	11	44
Band-Advanced	106	106	119	109	9	161	162	
General Music	15		9	5				
Choir I	34	34	12				21	
Choir II	12	12	15	18	19	14		26
Choir III	59	59	52	42	42	29		
Library Science	27	27		23	24	29	19	
<u>FOREIGN LANGUAGE:</u>								
French I	50	50	32	19	18	14	39	
French II	32	33	24	26	25	15	7	
French III	16	9	13	7	7	15	11	
French IV		7				1		
Spanish I	66	60	59	97	100	93	88	24
Spanish II	78	55	39	34	34	82	72	28
Spanish III	18	8	13	13	13	37	54	5
Spanish IV		7					12	
Modern Language								
Latin I					53	19		
Latin II						18		
						37		

COURSE ENROLLMENT FIGURES

Clifton Forge
High School

1983-84

Alleghany High School

1984-85

1983-84

1982-83

1981-82

1980-81

1979-80

1978-79

SUBJECT

HEALTH & PHYSICAL EDUC:

Health & P.E. I	297	328	308	313	305	338	105
Health & P.E. II	278	277	254	231	365	288	119
Health & P.E. III	247	270	225	244	262	295	142
Advanced P.E.	23	25	30	28	16	34	10
Driver Education							

LANGUAGE ARTS:

English 8 (B.S.)	146	57	53	48	148	165	30
English 8 (O.G.)	55	150	154	116	36	53	
English 8 (CH)	95	92	87	121	109	113	
English 9 (B.S.)	49	52	36	46	50	39	62
English 9 (O.G.)	133	127	156	132	121	150	
English 9 (CH)	82	107	102	94	66	116	
English 10 (B.S.)	30	40	15	15	30	43	59
English 10 (O.G.)	116	113	116	105	154	150	
English 10 (CH)	129	102	83	115	155	108	
English 11 (B.S.)	21	16	15	6	22	10	48
English 11 (O.G.)	121	137	130	109	163	129	
English 11 (CH)	63	77	64	74	50	82	
English 11 (AP)					22	29	
English 12 (B.S.)	21	22			17		68
English 12 (O.G.)	88	66	155	146	172	184	
English 12 (CH)	90	89	66	73	68	83	
English 12 (AP)			13	21	17	19	
Focus English					5	12	
Remedial English (8,9,10)			14				25
Remedial English (9-12)							11
Exploring the Arts							
Public Speaking	13	8	15	24		16	

COURSE ENROLLMENT FIGURES

Clifton Forge
High School

SUBJECT	1978-79	1979-80	1980-81	1981-82	1982-83	1983-84	1984-85	1983-84
<u>LANGUAGE ARTS:</u>								
Journalism	14	14	17	8	8	12	13	
Drama	10	9			7	20	21	
Creative Writing	18		10	16		7	13	
Mythology		8					5	
Humanities	26	9	13	23	13	22		
Developmental Reading 8			27	18	18	11	13	
Developmental Reading 9-12	35		10	11	12		6	
<u>MATHEMATICS:</u>								
Math 8 (B.S.)	40	40	42	43		20	50	24
Math 8 (O.G.)	113	113	100	86		91	127	
Math 9 (B.S.)	25	26	18	17		29	23	7
Math 9 (O.G.)	69	75	58	64		114	76	
Algebra, Part I	55	62	49	75		54	86	17
Algebra, Part II	24	25	35	62		59	41	8
Algebra I	135	136	98	131		103	171	45
Algebra II	78	62	71	90		135	138	16
Geometry (Regular)	85	79	74	69		149	156	38
Geometry (Accelerated)			33	28		33		
Remedial Math			9	3				
Calculus	8	7	14	10		9	17	12
Pre-Algebra	166	169	187	185		74	144	22
Trigonometry	25	26	24	33		50	67	
Consumer Math						26	71	13
Computer Science						99	84	
Focus Math						4	11	35

COURSE ENROLLMENT FIGURES

Clifton Forge
High School

Allcghany High School

SUBJECT	1978-79	1979-80	1980-81	1981-82	1982-83	1983-84	1984-85	1983-84
<u>SCIENCE:</u>								
Physical Science (B.S.)	52	59	35	38		60	56	
Physical Science (O.G.)	164	161	154	155	227	224	216	47
Physical Science (CH)	88	80	73	81	81	28	66	
Biology (B.S.)							18	
Biology (O.G.)	139	176	189	162	141	193	154	64
Advanced Biology						43	111	21
Chemistry	55	54	58	72	71	68	81	32
Advanced Chemistry								11
Physics	13	13	12	16	15	28	30	14
Focus Science						3		
Earth Science (O.G.)						23	219	56
Earth Science (CH)							42	
Focus Biology							10	
<u>SOCIAL STUDIES:</u>								
Man & Society	25	28	31	18				
Teenager & the Law	23	19	25	33				
Sociology	22	22	54	57		7		
World Geography	130	174	158	51		69	87	
World History (O.G.)	71	107	59	67		135	99	62
World History (CH)	111	82	75	51		81	119	20
U.S. History (B.S.)	14	17	28	35		66	43	
U.S. History (CH)	108	76	97	78		78	15	58
U.S. History (O.G.)	132	127	178	72		103	117	
U.S. Government (O.G.)	131	150	117	147		170	223	
U.S. Government (CH)	22	45	74	102		113	113	69
Advanced Social Studies		9	5			102	85	
							10	

COURSE ENROLLMENT FIGURES

Clifton Forge
High School

SUBJECT	Allegghany High School				1983-84	1984-85	1983-84
	1978-79	1979-80	1980-81	1981-82			
<u>SOCIAL STUDIES:</u>							
Social Studies 8 (B.S.)					34	31	
Social Studies 8 (O.G.)					121	157	
Virginia History 8					10		
Focus Social Studies					3	13	
Economics						19	
<u>SPECIAL EDUCATION:</u>							
English			17	16			22
Math			15	11			11
History			2				
Job Preparation			10	4			
Science			6				
Government				10			12
Biology				6			8
Social Studies							16
<u>VOCATIONAL EDUCATION:</u>							
DE I	13	12	16	19			
DE II	14	18	16	13			
DE III	9	9	10	15			
Mechanical Drawing I	38	43		23			
Mechanical Drawing II, III	19	20					
World of Manufacturing	16	17	22	36			
Typing I	140	153	123	110	33	19	13
Personal Typing	13	21	54		155	135	39
General Business	72	81	85	84	67	44	
Business Math	21	22	23	18	12	20	24
					40		23

SUBJECT

VOCATIONAL EDUCATION:

Voc. Agriculture I	28	32	57	39	11	50	17
Voc. Agriculture II	16	15	18	35	32	33	11
Voc. Agriculture III	17	17	18	18			
Voc. Agriculture IV	17	17				8	17
Woodworking I	26	20					11
Woodworking II	34	35					7
Woodworking III & IV							
World of Construction	32	33	44	50		43	
Home Economics I	74	85	92	66	24	20	17
Home Economics II	11	21	12	12	15	12	7
Home Economics III		10	20		11		
Family Living	18	18	29	17			
Interior Decorating	10	9	24	6	17	14	
Materials & Processes			63	44	38	20	
Architectural Drawing			35	21	21	17	5
Basic Technical Drawing			50	47	13	73	
Mechanical Drawing III & Industrial Drawing					17		
FOODS				14			
Introduction to Business					82	37	
Personal Record Keeping					82	37	19
Introduction to Home Ec.					11	35	
Electricity					14		3
Wood Technology					19	47	
Wood Technology II					26	23	
Power & Transportation					35		
Electricity & Metals							
Engineering						25	
Exploring Technology						16	
Modern Industry						14	
Economics							9

Appendix R

Final Report - Middle School Curriculum Committee

FINAL REPORT
MIDDLE SCHOOL CURRICULUM COMMITTEE

4. Course Offerings (continued)

Elective Courses - Semester - Art
Business (General Business and Bookkeeping)
Chorus
Creative Writing
Drama
Electricity
Home Economics
Mechanical Drawing (Basic)
Mythology
Typing
Virginia History
Vocational Agriculture
World of Construction
World of Manufacturing

The committee recommends that the seven-period per day schedule not include a study hall. A typical student's schedule could be:

1st Period - Pre-Algebra
2nd Period - English
3rd Period - Science
Lunch
4th Period - Health & Physical Education
5th Period - Social Studies
6th Period - Wheel
7th Period - Band

The committee further recommends that the student's promotion or retention be determined by an evaluation committee composed of the principal, the guidance counselor, and the student's individual teachers.

The Middle School Curriculum Committee would like to thank the Allegheny Highlands School Division for giving us an opportunity to present recommendations for the Middle School Curriculum.

Yours in education,

Middle School Curriculum Committee
B. C. Williams, Jr., Chairman

FINAL REPORT

MIDDLE SCHOOL CURRICULUM COMMITTEE

The Middle School Curriculum Committee would like to submit the following list of recommendations to the Allegheny Highlands School Board to be considered for the 1983-84 school year:

1. Credits Toward Graduation

The recommendation of this committee is that credits earned in the eighth grade should not count toward graduation from Allegheny High School.

2. Type of Daily Schedule

The committee recommends that the daily schedule consist of a seven-period day. Each period would be approximately 40 minutes in length.

3. Report Card Format

The committee did not have a specific recommendation concerning report card format. The committee felt that the report card format should be left to the administrative staff after final decisions are made concerning the curriculum.

4. Course Offerings

The committee recommends the following lists of courses to be included in the Middle School Curriculum. The courses are listed in two categories: A. Required Courses and B. Electives. Electives are further broken into year long courses and semester courses.

Required Courses - Math/Pre-Algebra/Algebra

English

Health & Physical Education

Science (General)

Social Studies (1. Citizenship; 2. Economics; 3. Geography)

The Wheel (Exploratory concept exposing students to six courses for one six weeks each)

* Wheel courses could be: Computer Literacy

Foreign Language

Home Economics

Woodworking

Art

Business

Elective Courses - Year Long - Band

Chorus

Developmental Reading

Remedial Reading

French

Latin

Spanish

* The student who elects to enroll in a full-year of a foreign language and band will be excused from the Wheel.

Appendix S

Final Report - Secondary Curriculum Committee

FINAL REPORT
SECONDARY CURRICULUM COMMITTEE

The Secondary Curriculum Committee was appointed by the Alleghany Highlands School Board in September and charged to provide recommendations on four major questions.

These questions and our recommendations are listed below.

1. How many credits will be required for graduation? Will credits toward graduation be earned by eighth grade students?

The recommendation of this committee is that a minimum of 19 credits be required for graduation. Credits earned in the eighth grade should not count toward graduation from Alleghany High School.

2. How many credits will be required in each discipline?

The committee recommends:

English -- 4
Social Studies -- 3
Health/Phys. Ed. -- 2
Math -- 2
Science -- 2
Electives -- 6

3. What will course offerings be at Alleghany High School?

The committee recommends that courses presently offered at Alleghany County High School and Clifton Forge High School be continued at the new high school.

In addition to those currently offered, the following new courses have been recommended by teachers from both schools and are endorsed by this committee:

Advanced Placement English (10th grade)
Advanced Placement English (11th grade)
Great Books (12th grade)
Wood Technology (A-pre-vocational and B-practical)
Latin I and II (Latin I offered in 8th grade)

The courses listed below are acceptable as recommended by the teachers:

Modern Language in Review (Russian and German)
Power and Transportation (2 semesters)
Horticulture (10th, 11th, and 12th grades)
Agricultural Business (10th,11th, and 12th grades)
Intermediate and Advanced Choir

We heartily approve of the two senior interest courses in Heating, Air Conditioning and Refrigeration and Health Care which are planned for the Jackson River Vocational Center next year.

The Committee further recommends that a student be allowed to schedule no more than one study hall per semester.

4. What should the report card format be?

The Committee recommends the format used by the Pulaski County Middle Schools shown below with appropriate changes to accommodate Allegheny High School's six grading periods and the addition of our numerical grading scale. We also recommend that the new high school follow the system presently used at Clifton Forge High School of reporting grades numerically.

NAME		PERIODS				GRADE			
FACILE		SUBJECT				TEACHER'S APPRENT			
YEAR		PERIOD				GRADE			
		PERIOD				GRADE			
		A	B	C	D	1	2	3	4
		1	2	3	4	5	6	7	8
LISTENS ATTENTIVELY									
FOLLOWS DIRECTIONS									
WORKS INDEPENDENTLY									
COMPLETES WORK ON TIME									
WORKS WELL WITH OTHERS									
TEACHER COMMENTS									

These recommendations were reached by consensus of this committee in accordance with the guidelines as provided by the school board. We firmly believe these recommendations are in the best interests of our students.

Respectfully submitted,

SECONDARY CURRICULUM COMMITTEE
 Bob Yarbrough, Chairman

Appendix T
Form for Indicating Preference for Assignment

1. My preference for assignment in 1983-84 is:

(Please rate your choices 1, 2, 3)

A. Clifton Forge Building _____

B. County High School Building _____

C. No preference - wherever I am needed _____

2. My first choice of academic assignment is _____

3. My second choice of academic assignment is _____

(Please list general areas (e.g. Math, Science, Home Economics)
not specific courses (e.g. World Geography, Civics, etc.)

4. In addition, I would like to be considered for the following extra duty assignments:

County High School

Clifton Forge School

Band _____

Band _____

Chorus _____

Chorus _____

Head Football Coach _____

Head Football Coach _____

Assistant Football Coach _____

Assistant Football Coach _____

J. V. Coach _____

J. V. Coach _____

Dept. Head English _____

Dept. Head English _____

Dept. Head Social Studies _____

Dept. Head Social Studies _____

Dept. Head Science _____

Dept. Head Science _____

Appendix U

Community Survey Results/Evaluation of Merger

PART II - INTERVIEWS

Purpose

The purposes of this portion of the Community survey were twofold:

- (1) to review the effects of the merger and solicit comments as to whether (and in what ways) the merger has been successful or deficient, and
- (2) to solicit evaluation and input data from knowledgeable community representatives as to
 - a. the quality of education in the community;
 - b. cost/quality comparisons with similar school systems; and,
 - c. suggested changes in policy/practice and priorities for resource allocation

in the Alleghany Highlands School System. (See Appendix - for Guided Interview Form)

Sample Selection

The selection of subjects for Part II of the community survey was accomplished by asking principals and other school officials to identify 5-10 "key actors" influential in the merger of the two school systems and/or knowledgeable about needs and interests regarding education in the community.

After receiving nominations, the names were recorded and the 24 "key actors" receiving the highest number of nominations were identified as targets for the interview. The list was examined to insure that no known "key actors" had been omitted by the process and that a reasonable

balance existed across three categories of citizens including:

1. governmental employees
2. governmental board members/representatives
3. non-governmental citizens

A final list of 27 key actors was prepared.

Survey Team - Procedures

The survey team was directed by Dr. Wayne M. Worner, Professor of Educational Administration at Virginia Tech. Four other members of the team included: Patti Blankenship, Pat Miller, Melanie Yules and Gail Keith. A set of procedures was developed to assure consistency in the interview process (See Appendix). Following an on-site briefing meeting on Monday, December 17, each survey team member conducted 4-5 interviews over a two day period. For the most part, interviews were conducted at the subject's work place. Following the interviews, members of the survey team met in a debriefing session during which each team member was asked to synthesize and summarize responses to the survey questions. Notations were made regarding consistency in responses (or lack thereof) within group categories (e.g. board members). Individual responses were not attributed. Dr. Worner prepared a general summary of the responses from the debriefing and collected the field notes for examination and comparison with the summary statement. Summary statements appear in the Findings section of this report.

Findings

How Effective Has The Merger Been? With respect to the questions related to merger, respondents over-whelmingly voiced the opinion that the merger had worked well. Major benefits most frequently cited included program quality and cost effectiveness.

Benefits of Merger

Specific program quality improvements noted were:

- expanded curriculum
- continuation of specialized classes
- more effective use of special staff competencies
- increased student competition

There seemed to be a general awareness that course offerings were broader for all students than previously but especially those students from Clifton Forge. Also a recognition that greater numbers of students make possible the continuation of specialized courses for a longer period of time than would have been the case with declining enrollment.

Cost benefit statements tended to center on efficiency and relative cost effectiveness rather than real dollar savings. While approximately half of the respondents suggested future cost savings would be more significant than initial cost savings, a fair number of the respondents believed that significant dollar savings had already accrued as a result of the merger.

Other positive changes in programs and services which received comment included: middle school organization (transition), improved foreign language offerings, expanded social interaction, additional courses, community cohesion, expanded transportation services, increased competition for college bound students.

Deficiencies of Merger

When asked what deficiencies or weaknesses respondents associated with the merger, nearly half responded "none". Those who did identify problems suggested that the problems had been insignificant and would likely decline

over time. Such items as integrating policies and procedures, selection of honor students, and issues of dollar equity in support of the school system were identified as "start up" problems which had been or were in the process of resolution.

One astute observer noted that students had adjusted more easily than parents to the merger. While it goes without saying that history and tradition are great impediments to change, the coming together of these two school systems has, according to those interviewed, been a remarkably smooth operation.

Several persons did observe that the budget making process, which requires approval by two governing bodies, is both cumbersome and potentially a major problem for continued success of the merger. As the actors change and the political dynamics shift, the school merger plan (which is based upon considerable good faith and trust) becomes more susceptible to external and non-school related issues.

Finally, 4-5 observers noted that the greatest weakness of the merger was that it did not include Covington and/or did not extend to other governmental services.

Other problems mentioned include: loosened ties between local government and the schools, concern about the insufficient number of minority role models (staffing), less individual attention/opportunity to participate for some, and identity problems. Generally, the interviewees believed that the schools are better and cost less (relatively) as a consequence of the merger. While some problems were noted, most were viewed as temporary and dissipating over time. Most of those interviewed recognized the tradeoffs associated with smaller school/larger school comparisons (e.g. individual attention vs. range of opportunities). All were in agreement that the merger should be judged as successful.

School Quality Issues

A second series of questions probed the perceived quality of the local school system, needed changes, fiscal support and priorities of the public.

When asked whether they believed local schools were "at risk", an overwhelming majority of the respondents indicated they did not believe criticisms of schools nationally were valid or particularly relevant to the local school situation. While several respondents indicated that problems did exist, most suggested the local schools were good and getting better.

Indeed, when asked to compare the local schools with schools in comparable sized communities, the largest group of those who had an opinion did so favorably. Generally, the schools were rated as "high average" or 6-7 on a 10 point scale.

Strengths of the School System

According to respondents, strengths of the school system outweigh the weaknesses by a considerable ratio. Mentioned prominently as strengths were:

- the physical facilities
- dedicated teachers
- competent administrators
- middle school program
- faculty evaluation plan
- community involvement in the school
(foundation emphasis)
- student relationships
- athletic programs
- focus on education
- excellent staff

Special emphasis was placed on the quality and commitment of personnel and the involvement of the community (with special note of the new Foundation Activities).

Weaknesses

Weaknesses identified included:

- difficulty of recruiting and retaining quality personnel
- over-emphasis of special interest groups (especially activities)
- lack of parental involvement
- level of community support
- use of community resources
- spelling and writing (language arts) emphasis
- physical plant
- minority staffing/role models

Of these weaknesses, special emphasis was placed on the problems related to teacher recruitment and retention (e.g. low salaries, rural area, etc.) and lack of parent involvement and support of the school programs.

Suggested Changes

When asked what changes they would make in the schools, the respondents listed a wide range of suggestions including:

- more emphasis on academics, less on sports (4)
- more competitive salaries (2)
- maintain the vocational program
- more emphasis on expressive and creative writing (2)
- eliminate study halls
- extend school year
- emphasize hi-tech and math (3)
- connect high school and vocational school (physically)

- improve communication within the system
- staff development
- improve physical education program
- balance arts (humanities) with science/math emphasis (2)
- upgrade needs assessment
- improve teacher morale
- better understanding of funding

Adequacy of Funding

As to whether the schools are adequately funded/supported, the largest number of those who ventured a response suggested that:

- the community does make a substantial effort
- the ability to provide additional resources locally is limited but if additional tax funds are to be spent, schools should be a high priority
- schools could use additional funds
- while some expenditures are questioned, on balance, the school system spends its money wisely
- the State has defaulted seriously in contributing its share - particularly given the state's continuing expectations/requirements (e.g. Standards of Quality and other movements).

Proposed Budget Targets

Were additional resources to be made available, a number of suggestions were made as to how the money should be spent. By far, the most often mentioned category of expenditures was improved teachers salaries. Approximately 80% of the respondents ranked teachers salaries as the top priority for expenditures. Other less often mentioned suggestions included:

facilities improvement

- general (5)
- auditorium (2)
- gymnasium

personnel

- summer employment for teachers
- recruitment (2)
- salaries improved (20)

program improvement

- general (2)
- math/science
- reading
- shop
- library
- computers

Clearly the major concern expressed by citizens had to do with the recruitment and retention of quality personnel. While not everyone agreed that increasing salaries would solve that problem, most indicated that additional resources for teaching personnel was a critical need. Respondents also indicated concerns about the difficulty in recruiting quality personnel to a rural area and particularly the difficulties in recruiting top notch minority teachers to the area.

General Comments

After responding to the set of questions, each respondent was given an opportunity to make general comments about the school system. Some of

them (in no particular order) noted the following:

- The recent efforts to organize an educational foundation and the attendant opportunities to visit the schools have been very well received.
- The school board and administration (with a few exceptions) gets very high marks for performance. Teachers and principals also received compliments from several respondents.
- Use of community resources and cooperation between governments is a value held by almost everyone we talked to. Few had suggestions as to how to make it happen; almost everyone wanted to look for ways.
- The community respondents exude great pride in their schools and their community. While acknowledging problems and difficulties- the overwhelming response to the work of the schools is positive.
- Some expressions of concern regarding the future health of the merger make it obvious that constant attention will be required.

Report Prepared By:

Dr. Wayne M. Worner
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Vita

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the scanned document**